

Manuscript preparation guide

This guide explains how to compose and format your content into a manuscript.

For camera ready books please see the [Camera ready \(LaTeX\) guide](#) (though many of the following principles will still apply).

We encourage you to review the [Manuscript submission guide](#) at this point too, to understand how everything will come together when you send us your manuscript.

The guide contains the following sections for each of the key components of your manuscript:

[Typescript \(text chapters\)](#)

[Front matter \(preliminary material\) and end matter](#)

[Endorsements](#)

[Artwork](#)

[Alt text](#)

[Permissions](#)

[Cover design](#)

There is also a final section on preparing [New editions](#).

Your book may also include additional content, formatting or features depending on your subject and your audience. Examples include further reading lists, review questions or example exercises. Please discuss this with your Commissioning Editor, who may direct you to additional subject-specific or technical information.

Diversity, equity, and inclusion

We believe in social justice, diversity, equity, and inclusion, and we support ethically responsible research. Many referencing guides include advice for using bias-free language, and we would encourage authors to consider this in their work. For example, Chapter 5 of the *APA Publication Manual*, 7th Edition contains guidelines for writing about people without bias across a range of topics, and specific guidelines that address the individual characteristics of age, disability, gender, participation in research, racial and ethnic identity, sexual orientation, socioeconomic status, and intersectionality.

We also encourage authors to consider diversity in their selection of contributors, texts, references, images, and case study examples.

Any language or imagery which could be considered bigoted, prejudiced, or triggering, including racist, graphic, disturbing, or sexist language and imagery, may be challenged and recommended for removal.

We do of course recognise that some work will by necessity engage with or quote such material for the purposes of critical analysis. If you anticipate using such material, we ask that you tell us in advance, so that we can prepare staff for any content they may find triggering/disturbing.

AI-based tools and technologies for content generation

Please be aware aware that using AI-based tools and technologies for chapter/book content generation, e.g. large language models (LLMs), generative AI, and chatbots (e.g. ChatGPT), is not in line with our authorship criteria. All authors are wholly responsible for the originality, validity and integrity of the content of their submissions. Therefore, LLMs and other similar types of tools do not meet the criteria for authorship.

Any assistance from AI tools for content generation and other similar types of technical tools which generate text content, must be clearly acknowledged within the book. It is the responsibility of authors to ensure the validity, originality and integrity of their book content. Authors are expected to use these types of tools responsibly and in accordance with our editorial policies on authorship and principles of publishing ethics.

Typescript

The typescript comprises the written elements of your book.

Each chapter (including introduction if relevant) should be composed as a separate Word document file. A sample chapter is provided [at the end of this section](#).

The chapter files should only include the final chapter text and editable images created in Word, but not any of the following:

- Artwork
Non-editable illustrative material should be supplied as separate files in the original format (e.g. eps, jpg, etc.). See our [Manuscript submission guide](#) for more information.
- Tracked changes
If tracked changes were used during the writing process, please ensure they are resolved, and that tracking is stopped on the version you submit.
- Comments
As with track changes, should you need to communicate specific requirements to us, please do so separately using the dedicated tools (such as the notes for the copyeditor form) or by email.
- Hidden text

Keep the layout simple. Your book will be professionally typeset, so you do not need to attempt to format the manuscript to convey a text design or how the final book will look. Please ensure you:

- Use a Unicode font available from Microsoft Word, such as Arial or Times New Roman.
- Number the pages of each chapter from 1 within each file.
- Add a line between paragraphs and avoid indents at the start of a paragraphs
- Do not use hyphenation to break words across a line (only in words where a hyphen is grammatically required).
- Do not present text in columns (even if columns will be used in the final book).

Please keep in mind that **all references, notes, and bibliographies or reference lists are included in the agreed word count.**

Callouts and Captions

Remember that the chapter text files should not contain anything that isn't text or isn't editable in Word. This includes:

- Figures that aren't editable (photos, screenshots, image files, etc.)
- Maps

These items should not be pasted or embedded in the chapter text files but submitted separately. See the [Manuscript submission guide](#) for more details.

These non-text items should, however, be described in the text using **captions** (and alternative text) and referred to clearly and consistently via **callouts** to indicate their inclusion and placement. This also applies to structured text that is included in the chapter, for example tables and boxes.

Name each item according to type, chapter, and order within chapter (rather than by sections within chapters), for example: Figure 1.1, Figure 1.2, Figure 2.1. Figure 2.2, Figure 2.3 etc.

The item numbers should match the file names for each item exactly. See the [Manuscript Submission guide](#) for more information.

Specific subject areas or complex books may require further categorisation, such as 'Example' for Music examples or 'Structure' for chemical structures.

Some smaller elements such as linguistic tables do not necessarily require specific labelling or numbering as they merely use a table for the practicality of formatting – ask your Editorial Assistant if unsure.

Callouts

Any item that needs to be inserted into the text needs a highlighted callout – a short, easily identifiable piece of text to indicate roughly where the item should be placed. The callout should match the naming of the item's file name exactly and should be highlighted to make it stand out. For example:

<Figure 2.3 here>

Note that, as per standard typesetting conventions, our standard text designs place any figures, tables, and boxes at the top or bottom of a page, as near to the callout as possible, but not necessarily in the exact location indicated in your manuscript.

When referring to non-text items, always be specific, for example "see figure 2.3" and do not refer to figures or tables "above" or "below,".

Captions

All numbered images and tables require a caption briefly describing the content.

Captions may also include any necessary source information such as who took a photograph, who provided some artwork, or where some data is from. Providers of this material may require a specific credit line as part of the permission to use that content; if this is the case, it is your responsibility to ensure that you include that in the caption (or wherever the provider has requested).

Here are some example captions:

Figure 2.3. A dog running along a beach. Photograph by the author.

Figure 3.1. Max Slevogt, *Wir können kein Licht auf die Palette spritzen*, 1898, ink on paper, 179 x 270mm, mounted on cardboard, 218 x 263mm. Landesmuseum Mainz, Inv. Nr. GS 2015/8. GDKE. Copyright: Landesmuseum Mainz (Ursula Rudischer).

Captions should be inserted directly below the callout (or the table) for that item.

Tables

Tables must be supplied in an editable format. Images of tables from other sources must be rekeyed.

Please use the table functionality in Microsoft Word and avoid using tabs and line breaks to construct the appearance of a table (which is prone to shift and become unintelligible during copyediting and typesetting). Larger, data heavy tables can be created in Microsoft Excel. Note that large tables might need to be typeset as landscape in your proofs if too wide to fit in portrait layout.

Editable tables should be included in the chapter text files rather than as separate files. See the [Manuscript submission guide](#) for more details.

Tables must follow the naming, numbering and caption conventions laid out above.

Boxes

Boxes can be used to isolate and highlight segments of text, perhaps for a definition or case study.

To indicate that a segment of text should be boxed, add appropriate tags, e.g. `<start box>` and `<end box>`.

Floating – standalone boxes should be positioned and numbered in the same way as a figure or table, with a caption, e.g. Box 1.1: Case Study, Box 1.2: Summary, etc.

Editorial style and conventions

You will need to determine certain stylistic approaches to take in your book, for example US or UK spelling, whether to use serial commas, and so on.

We do not have a specific 'house style', but your Commissioning Editor may suggest or request a specific style depending on your subject area, audience and/or primary market (i.e. predominantly US or UK readership).

The most important consideration is ensuring consistency of style throughout the manuscript, regardless of the conventions used. This applies to aspects such as spelling, serial commas, acronyms, and referencing style.

For a full list of stylistic considerations, see the [Notes for the Copyeditor](#) form. Consider these style choices while writing, rather than filling in the form before submission only to realise they are not consistent.

Once the most appropriate style for your manuscript has been selected, many authoritative resources are available to consult, for example the latest edition of *The Chicago Manual of Style*.

Referencing

Please check with your Commissioning Editor whether a specific style is expected.

If there is no specific expectation, any suitable referencing style can be used, so long as it is applied consistently throughout the manuscript, including in edited collections.

Some styles have multiple options (for example, Chicago has both author-date in-text references and notes/bibliography). Please select one and apply it consistently.

Bibliographies and reference lists

A bibliography or reference list should be provided at the end of each chapter so that chapters are accessible in isolation, especially in digital formats.

Every referencing style will include a bibliography or reference list containing full details of everything cited, though the presentation conventions may vary.

Digital Object Identifiers (DOIs) should also be included where available.

Notes

Notes can be used to provide further detail, or for referencing where appropriate to the chosen referencing style.

Notes should be numbered by chapter, not throughout the whole manuscript. We typeset notes as endnotes at the end of each chapter and will convert footnotes accordingly.

It is essential that notes are added using the 'insert endnote' functionality within Word. This allows for the numbering to be dynamically changed if the text is reordered. Guidance on how to use this feature is widely available.

Be economical when using discursive notes and remember that these are included in the word count. If your manuscript contains excessive text in notes, consider if it is essential to the book, and if so, incorporate it into the main text.

Headings

Headings and subheadings can help provide structure and promote readability.

In the book, headings will be employed at typesetting stage, following one of our established text designs. In your manuscript, the main consideration is clearly identifying different levels of heading for the benefit of the typesetter.

Please use no more than three levels of subheading unless absolutely necessary and avoid numbered headings unless prevalent in your subject area (e.g. STEM subjects, Linguistics) and/or approved by your Editorial Assistant.

We recommend using Microsoft Word's style gallery to indicate different levels of headings (i.e. Heading 1, Heading 2, Heading 3).

Alternatively, ensure headings are consistently and clearly differentiated through formatting, for example:

Heading level 1

Subheading level 2

Subheading level 3

Special characters

The book will be typeset in a suitable font depending on the text design and any special character requirements.

If your manuscript will include characters not generally found in Western European languages, e.g. Greek, Hebrew, or Arabic, it is essential that they are typed in a font which supports Unicode, such as Times New Roman or Arial.

Please use fonts available in Microsoft Word: do not use a downloaded non-Unicode font as we cannot use these fonts.

Note that not every Unicode font supports every language, especially East Asian languages. The following are available in Word (depending on the version you are using):

- Chinese: Microsoft YaHei, Microsoft JhengHei, SimSun, PMingLiU, or KaiTi
- Japanese: MS Gothic, Yu Gothic, or MS Mincho
- Korean: Batang or Malgun Gothic

Please submit a PDF of any chapters containing special characters and/or equations. This will act as a fixed reference for the typesetter to double check everything has been reproduced correctly.

You should also pay close attention to any special characters when checking the proofs.

Abstracts

Every chapter, including the introduction and conclusion, requires an abstract. The abstract is a selling pitch for the chapter, focusing on what it is about and what the reader can expect to gain from reading it.

Each chapter abstract should be:

- 100–200 words
- Written in the third person e.g. ‘this chapter discusses’, rather than ‘I discuss’
- Self-contained, without abbreviations, footnotes, or incomplete references

Place the abstract in the chapter file, before the main chapter text, under the heading ‘Abstract’ and highlight the abstract to distinguish from the chapter text.

See the [sample chapter](#) for a visual reference.

Abstracts are copyedited and will appear in the files for you to check during production but will not be visible in the final book, unless you have agreed otherwise with your editor. They will appear on our institutional eBook platform taylorfrancis.com.

For more details on the importance of abstracts see our guide to [Making your work more discoverable](#).

ORCID

ORCID is an effective way for each author to make themselves and their work discoverable to others, to ensure they are always appropriately credited and to promote their publications. For further information, including how to obtain an ORCID iD, please see the ORCID section in our guide to [Making your work discoverable](#).

Include an ORCID iD for every author of every chapter, repeating as necessary. Copy and paste ORCID iD(s) beneath the relevant author name(s) in each chapter Word document, beneath the chapter title and before the abstract.

Authored books: include author name(s) and ORCID iD(s) on all chapter title pages and book title page.

Edited books: include editor name(s) and ORCID iD(s) on book title page and on any chapter to which they have contributed as a named author (alongside other chapter author name(s) and ORCID iD(s)).

Double-check ORCID iD(s) for accuracy before submission (test by confirming they return the right profile!).

Neither abstracts nor ORCID iDs will appear visibly in the printed book.

Please avoid adding email addresses or other contact details for authors to your manuscript. This is for future-proofing as well as privacy reasons.

Research data

T&F Books encourages you to share any research data associated with your book (or chapter). This may take the form of videos, transcripts, and questionnaires as well as data files and spreadsheets. Please see our [Data Sharing Policy](#) for more information.

Shared data should be cited in line with your chosen referencing style and a data availability statement should be included in the preliminary material for your book. Templates are available [here](#).

Sample chapter

An editable Word version of the sample is also available [here](#).

1. Chapter title

Anne Author

<https://orcid.org/0000-0000-0000-0000>

Abstract

This chapter covers how to format your chapter files in the manuscript you will provide to Taylor & Francis. It covers manuscripts supplied in Microsoft Word format. The chapter includes all the basics; it emphasises that Taylor & Francis do not have a set house style, but instead require consistency throughout in terms of stylistic choices including spelling and referencing. It also includes guidance for including abstracts, such as the present one, and keywords, as below. It includes information on non-textual content and how this is indicated and referred to in the chapter itself, with specific guidance on callouts and captions.

The chapter text as it will appear in the book then begins here. Note that the purpose of this sample is to show how to include the various aspects outline above including abstracts, keywords, tables, figure callouts and special characters. The actual formatting in terms of line spacing and font size etc. only needs to be clear and consistent rather than following any requirements.

You may choose to refer to tables in the text, such as Table 1.1.¹ Note that the table has been added using the insert table functionality within Word, rather than being an image pasted into the document. Because this is created using Word and is fully editable, it is fine to include in the manuscript itself.

State	Abbreviation
Alabama	AL
Alaska	AK
Arizona	AZ
Arkansas	AR
California	CA

Table 1.1. Some U.S. states and their abbreviation

What about images?

You may also decide to include an image somewhere. In this case, it's a photograph, so see the Artwork section for details on the technical requirement of the file itself. The image file *should not be inserted into the chapter*, but instead flagged with a callout, along with a caption.

<Figure 1.1 here>

Figure 1.1. A dog running along a beach. Photograph by the author.

What about special characters?

If the manuscript includes any special characters or equations, make sure these are included in a font that supports Unicode so they will appear the same when opened on another computer or changed to a different font, and also provide an approved PDF of the chapter that can be used as a reference by the typesetter.

Example

Your book may include some ancient Greek such as the opening to the *Histories* by Herodotus: Ἡροδότου Ἀλικαρνησέως ἱστορίας ἀπόδεξις ἦδε, ὡς μήτε τὰ γενόμενα ἐξ ἀνθρώπων τῷ χρόνῳ ἐξίτηλα γένηται, μήτε ἔργα μεγάλα τε καὶ θωμαστά, τὰ μὲν Ἕλλησι τὰ δὲ βαρβάροισι ἀποδεχθέντα, ἀκλεᾶ γένηται, τὰ τε ἄλλα καὶ δι' ἣν αἰτίην ἐπολέμησαν ἀλλήλοισι.²

Reference list

Herodotus, *Histories*, trans. A. D. Godley. Cambridge: Harvard University Press, 1920.

Taylor & Francis, 'Manuscript preparation guide'. Taylor & Francis, 2021.

<https://www.routledge.com/our-customers/authors/publishing-guidelines>

¹ Note that the table is referred to by number, rather than just 'below'. See Taylor & Francis, 'Manuscript writing and formatting guide' (Taylor & Francis, 2020).

² Herodotus, *Histories*, trans. A. D. Godley (Cambridge: Harvard University Press, 1920), 1.1.0.

Front matter (preliminary material) and end matter

Front matter and end matter include all the supporting material a book requires in addition to the substantive content contained in chapters, such as the table of contents and the index.

The following information applies to most T&F Publications, but certain subject areas may organize their front and end matter slightly differently. Please consult your Editorial Assistant to confirm the appropriate content and order of front and end matter for your book.

Front Matter (Preliminary material, or “prelims”)

Submit your prelims as a single Word file. Include each of the following elements as relevant on the page indicated.

Endorsements (optional)

Half title page

- This should feature your title, but not subtitle.

Data availability statement (optional)

- To be included if research data is shared/cited. Templates are available from the Data Sharing Policy page.

Title page

Main title

Subtitle (optional)

“Edited by” (optional)

All author/editor names

- Ensure that the order and exact presentation of the names is final.
- If this has changed, flag to your EA so we can update our database, which feeds out online.

ORCID IDs for each author/editor (optional)

Dedication (optional)

- Do not include any epigraphs of copyrighted material.

Table of contents

- Format as a simple text list (do not use tables, tabs, columns, or any other complex formatting)
- Do not include page numbers (these will be added during typesetting and will not match the manuscript)
- To include the following

Front matter elements (from table of contents onward, as below in this list)

All chapter titles, to match the chapters exactly

For edited or multi-author collections, the names of chapter authors (presented on the next line below the relevant chapter)

Part numbers and titles (optional)

Chapter subheadings if relevant (no more than three levels including chapter title)

List of contributors (edited books)

- Alphabetical order by surname.
- Do not include titles as part of the name.
- Ensure names match both the contents and the chapters exactly.
- To include:
 - Name (in bold)
 - Affiliation
 - Country
 - Brief (50 words) professional biography (optional)
- Two options for presentation:
 - Sentence biography (preferred for Routledge)

Anony Mous is a fictional staff member at Taylor & Francis, UK and is on the board of Publishing Guidelines.

- Stacked (preferred for CRC Press) For stacked, please keep only the basic affiliation information and don't include street addresses, email addresses, phone numbers or department names.

Anony Mous

Taylor & Francis

Abingdon, UK

Foreword (optional)

A short introductory piece by someone else, for example a recognised figure in the field or a series editor.

Preface (optional)

A short piece by the author(s) explaining how the book came to be written. Anything more detailed dealing with the content itself should be treated as an introduction and therefore a standalone chapter.

Acknowledgements (optional)

- Personal or professional thanks to supporters or contributions beyond the author team.
- Crediting sources of third-party material using any wording requested with the grant of permission for use (a separate list of credits is also acceptable if the volume is substantial).
- Can be combined with or form the end of a preface if preferred.

List of acronyms and abbreviations (optional)

End matter

Appendices (optional)

Glossary (optional)

- Can be included as front matter if preferred.

Index

- Compiled during the Production process at proof stage
- To be completed by you as author/editor, unless agreed otherwise with your Commissioning Editor prior to manuscript submission (in which case you may wish to submit a list of essential terms for inclusion with your manuscript). See [Indexing guidelines](#) for more information.

Endorsements

Endorsement quotes from notable people in your field can boost the impact of your book. We encourage you to secure endorsements, but they are not mandatory.

Unless agreed otherwise with your Editorial team, securing endorsements is your responsibility.

If you send your endorsers' email addresses to your Editorial Assistant, they will send each endorser a free electronic copy of the book upon publication.

Specifications

It may seem obvious, but it is worth clarifying to potential endorsers that their quote should mention the book, or a feature of the book, and the benefit it delivers to the reader or the subject area.

Each endorsement must be no more than 50 words in length (1-2 sentences), including the endorser's affiliation as a credit line.

Example

"Through careful design and composition, T&F's *Author Guidelines* make it easier than ever to publish high quality, impactful academic and professional content. I would recommend this resource to all T&F authors and prospective authors."

Professor Joe Nemo, *Fictional Institute for Examples, Canada*

Submission and use

If you'd like endorsements to appear in your book they must be submitted as part of the manuscript along with the rest of your content. There is only space for two or three endorsements in the book.

Endorsements received after manuscript submission can still be added to your book's online profile. While there is space online for a few more quotes, keep in mind that customers will only read so many endorsements!

We will also take snippets from any positive reviews your book receives and display these as endorsements in your book's online profile.

Artwork

This section covers the technical requirements for images you wish to include in your book. For information on image callouts and captions within the script, see the Typescript section. For how to name, organize, and send files, see the submission guide.

If you did not agree to a specific maximum number of images, please discuss your intended inclusions with your Editorial Assistant in advance of manuscript submission.

Unless previously agreed with your Editorial team, please only include images in your book if they are essential to conveying your point(s) successfully, rather than for decoration.

Bear in mind that your book will be printed in black and white (unless agreed otherwise) so all imagery you include should be legible when in a greyscale format. For example, very dark, low contrast photographs or graphs with numerous shades or colours may not translate well and should be adjusted or omitted. References to colour within the text (e.g. “the blue section of Figure 2.1” should not be included.

Similarly, even if an image is technically good enough, consider how it will appear on the page, and whether the specific detail is important, or just the overall context. For example, a very detailed map at only five inches across may not be legible enough to identify towns or roads, but if the objective is just to show the broad shape or location of a country, it may be sufficient.

Halftones

Photographs, screenshots, and any other images with a continuous variation of colour and shading are considered halftones.

For a book of a typical trim size, halftones should be supplied as individual files at a minimum of 1,500 pixels wide and at their original resolution (the higher the resolution the better) to allow them to be printed across the full width of the print area on the page at a suitable print quality.

Do not use any software to artificially enlarge an image made up of pixels. While this may make it technically large enough, the image will appear pixelated and low quality.

Please discuss with your Editorial Assistant if you have an image that does not meet the above size requirements but is essential to the context of the book.

Halftones should be supplied as .jpg or .tiff files (screenshots can be supplied as .png files). Do not paste halftones into the manuscript. See the [Manuscript submission guide](#) for further details.

If you will be depicting people in your images, aim to reflect diversity as far as possible, including in characteristics such as age, gender and sexuality, ability, racial and ethnic identity, and cultural background.

Line art

Graphs, diagrams, equations, lines, and shapes over a plain background are considered line art. They are composed of block colours with little or no shading.

Line art should be supplied as editable files in the original format or software in which it was created. This will allow for both the whole image and individual elements to be resized and optimized for the page if needed without impacting the quality of the image.

The format will depend on what the image is and how it was made. Microsoft Office Word or PowerPoint can create simple diagrams such as flowcharts using in-built functionality, and Microsoft Excel can be used to create graphs and charts.

Most specialist software will have various options for exporting images. Suitable vector formats are .eps, .svg, and .ai (adobe specific).

Do not copy line art from other material and supply as a halftone. Diagrams or graphs should be remade where possible.

Where line art is only available as a halftone image it will need to adhere to the halftone requirements provided in this guide. A higher resolution is needed to print at a suitable quality; lines and curves can otherwise appear jagged.

While line art may include other text, do not embed the figure caption within the image. This should be provided separately (see the [Typescript section](#) for more details).

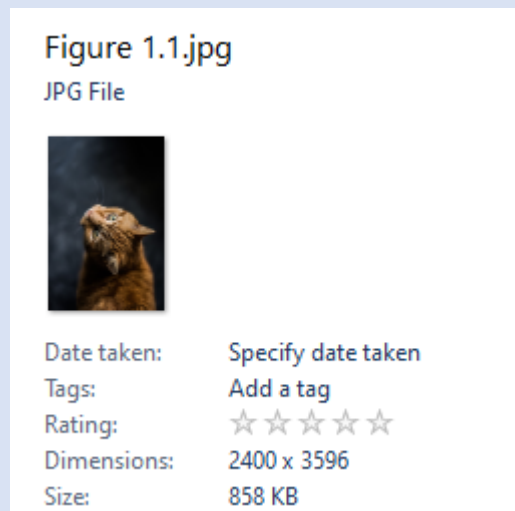
Composite images

If you have a line art image that includes halftone elements (for example, a large flowchart), supply the overall line art as above (i.e. editable) and the halftone elements separately in their best, original size and resolution. Flag to your Editorial Assistant that it is one 'figure' overall.

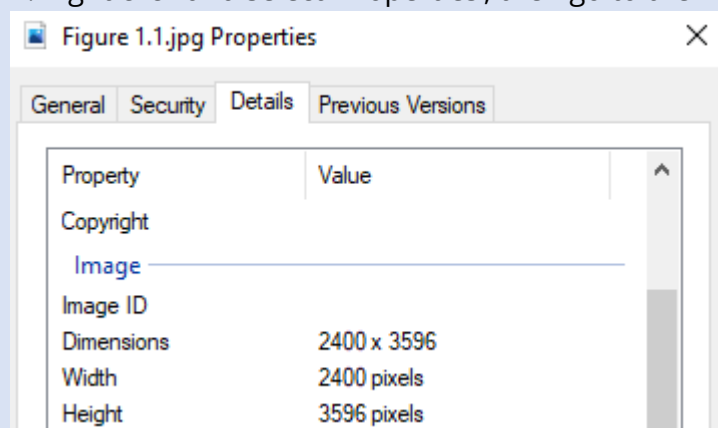
Checking image size

There are three ways to check that the width of your image is at least 1500 pixels in Windows Explorer:



1. Select the file and click Alt + Shift + P to show the Details pane:



2. Right click and select 'Properties', then go to the 'Details' tab:



3. Set your file view to 'Details' by selecting 'Details' view under the View tab at the top of Explorer. Then right click one of the columns in the window, click 'More', and select 'Dimensions' to add it as a column in your folder view:

Name	Status	Date modified	Type	Size	Dimensions
 Figure 1.1.jpg		01/02/2021 10:14	JPG File	859 KB	2400 x 3596

Remember to look at the image and confirm that it is clear and good quality at the right size.

Alt Text

What is alt text?

Alternative Text (alt text) is a short text description that can be digitally attached to figures or images to convey to readers the nature or contents of the image. It is used by systems such as pronouncing screen readers to make the object accessible to people that cannot read or see the object due to a visual impairment or print disability.

All figures in T&F publications require an alt text description (unless they are purely decorative, which is generally discouraged). This includes visual resources hosted in instructor resources, image banks, companion website downloads and author-hosted websites (all websites should be fully accessible in line with [Web Content Accessibility Guidelines](#)).

Video and audio content will require the equivalent for alt text, which is at the very minimum, a transcript. You can read more about creating transcripts on the [W3C website](#).

A complete guide to writing alt text is available on our [website](#).

Permissions

You need permission from the rightsholder(s) of any third-party material to use it in your book if the original source is under copyright.

If you think permission is not required for a piece of third-party material, you will need to provide proof. This includes where the original work is copyright exempt/expired/licenced and where you are invoking fair use/dealing.

You must document information on the use of and permission for all third-party material in your book in the [Artwork and third-party material permissions log](#) and submit this and the [Permissions declaration form](#) when you submit your final manuscript.

Unless you have made an alternative arrangement in writing with your Commissioning Editor, it is your responsibility as author (or for edited books, jointly as editor with your contributors) to obtain, and bear the cost of, third-party material and permissions.

Permissions can be complicated, time-consuming, and expensive. Our primary piece of advice is to avoid third-party material and avoid permissions. If you feel third-party material is necessary, get the process started as early as possible as it can take time for rightsholders to respond.

Overview of the permissions process

1. Identify third-party material
2. Confirm that third-party material is necessary
3. Determine copyright status of third-party material
4. Apply for permission
5. Document permission
6. Submit permission

Disclaimer

We have collated the information in this guide to help you with permissions, but we cannot legally judge if something needs permission. Our policy is to err on the side of caution. We encourage you to seek legal advice.

We will remove any third-party material for which evidence of permission or exemption is not provided.

1. Identify third-party material

Third-party material comprises anything you have not created specifically for the forthcoming work we are publishing. This includes:

- Material you or your company/institution has created previously, whether published or not
- Material from other T&F publications
- Redrawn artwork³
- Third-party material included in previous versions (such as dissertations) or editions

2. Confirm that third-party material is necessary

Referring to, describing, or discussing third-party material is often enough to serve the intended purpose of using it. If including third-party material is unavoidable, use only as much as is necessary to support the original content you are basing upon it.

3. Determine copyright status of third-party material

About authors, rightsholders and sources

The author of the source of material is not necessarily the creator or rightsholder of the material – they may have included it (presumably with permission) from a third-party. Please ensure you check the attribution/credit line or acknowledgements.

The author/creator is not necessarily the appropriate rightsholder from whom to secure permission (even if they are the copyright holder); the publisher or curator of the material will usually hold reproduction/distribution rights and is usually the best place to start.

About copyright

Copyright protects creative works⁴ as intellectual property, preserving the interests of the creator/rightsholder(s) and controlling use of material by others. The Wikipedia entry on copyright is a good place to start: <https://en.wikipedia.org/wiki/Copyright/>

And primary source information on US and UK Copyright can be found here:

UK Intellectual Property Office: <https://www.gov.uk/topic/intellectual-property/copyright>

US Copyright Office: <https://www.copyright.gov/>

Creative commons and open access

Copyright works may be made available via a creative commons licence, which is also the mechanism by which most publications are made open access. There are numerous

creative commons licences that allow varying degrees of freedom to reproduce material. See creativecommons.org for more information and links to creative commons media and sources.

If you want to use any third-party material in your open access book, you must additionally make sure that the permission granted by the rightsholders includes re use in an open access publication, stipulating which creative commons licence it will be published under.

Public Domain

Works in the public domain are those for which no exclusive intellectual property rights apply. These are usually therefore available for use without payment or permission, although attribution is ordinarily required. See [Wikipedia's entry on the public domain](#), which covers copyright expiry timeframes and plenty more.

Warning: the internet

It can be difficult to trace the original source of material and prove that it is in the public domain. There is an important difference between a work being 'publicly available' because someone has posted it on the internet, and 'in the public domain'

Material is not in the public domain simply because it is available online, where material is frequently posted without the knowledge or permission of the rightsholder(s).

Remember that is our policy to exclude anything without proof that it is usable, so you will need to provide this if you wish to use something in your work.

Fair Use and Fair Dealing

Fair use (US) and fair dealing (UK) are related legal concepts that allow the inclusion of brief excerpts or limited illustrations from copyright work without explicit permission.

There is, deliberately, no definition of either fair use or fair dealing (i.e. "up to 400 words"). Each case must be analysed to determine the reasonableness of the use.

Both US and UK law provide clear guidance for analysing fair use based on nature of the new publication, the purpose or character of the use, the amount of material being used (especially as a proportion of the original work) and the potential impact that its use may have on the original publication. We urge you to review information on this if you are considering relying fair use/fair dealing to justify the use of copyright material:

UK: <https://www.gov.uk/guidance/exceptions-to-copyright#fair-dealing>

US: <https://www.copyright.gov/fair-use/more-info.html>

Specific T&F policy on fair use/fair dealing

As a commercial publisher, the scholarly or education nature of our publications is rarely a justification for fair use or fair dealing.

Epigraphs do not constitute fair use or fair dealing and T&F do not allow for their inclusion. If you wish to include a quotation it must be embedded and actively addressed in your text.

Commonly used sources of permission-free material

Please review the information provided for any individual document or source to confirm in each specific case.

- Publications by the US federal government
- UK government and legal materials (Crown copyright):
<https://www.parliament.uk/site-information/copyright/open-parliament-licence/>
<https://www.nationalarchives.gov.uk/doc/open-government-licence/version/3/>
- European Court reports and judgments, treaties and regulations reproduced from EUR-Lex, Europa or Curia
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<https://books.google.com/ngrams/info>
<https://www.google.com/permissions/geoguidelines/>
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- Our science-related imprints and lists ⁵ can take advantage of the STM Permission Guidelines (of which T&F is a member and signatory) to use small portions of works published by other signatories for free, and sometimes without seeking permission. See: www.stm-assoc.org/permissions-guidelines/

Resources for finding the rightsholder(s)

A list of library holding directories, rights management societies and publisher associations is listed below that may help you track down the rightsholder of a work.

<https://www.hrc.utexas.edu/research/watch/about/>

<https://www.dacs.org.uk/>

<https://discover.libraryhub.jisc.ac.uk/>

https://www.literarymarketplace.com/lmp/us/index_us.asp

<https://arsny.com/>

<https://publishers.org/>

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4. Apply for permission

Unless otherwise agreed in writing with your T&F Editor, you will need

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Please discuss with your T&F Editorial Assistant if any third-party rightsholder requests anything more restrictive than the above or requires additional details (e.g. expected price, year of publication).

There are three options for requesting permission depending on the material and the rightsholders' requirements:

1. Request and obtain permission quickly through the [Copyright Clearance Center](#) if possible.
2. Follow the guidance on the work's page on the rightsholder's website or in their information section, especially if you are contacting a publisher (for example www.routledge.com/info/permissions). There may be a specific form or email address for permission requests.

3. Email your request to the likely rightsholder. Some suggested wording is included [below](#).

Be prepared to pay for permission and to negotiate any fees demanded (underscoring to copyright holders that the use, though commercial, is for educational or scholarly purposes, is a good tactic).

Permission email template

Edit/complete any portions in [square brackets]

Subject line: Permission request for [Routledge/CRC Press] book

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The material for which I am requesting permission is:

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to be reprinted in:

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Appropriate credit will be given in the book's acknowledgements and/or alongside the material. Please indicate your preferred wording.

If you have any questions about this request, please contact me at [insert contact info.]. Many thanks for your attention to this request.

5. Document permission

Use the [Artwork and third-party material permissions log](#) to keep track of your third-party materials, their permissions status, and your evidence.

Ensure that appropriate credit has been given in your manuscript, either alongside the material, or in an acknowledgements section. Follow any requirements given by the rightsholder in terms of location and wording.

6. Submit permission

Submit your [Artwork and third-party material permissions log](#), and all permissions evidence along with the rest of your manuscript materials on or before the due date. You will also need to sign and return the [Permissions declaration form](#).

Permissions will be assessed as part of the manuscript assessment. Production will not begin until all aspects of the manuscript, including permissions, are finalised. Material without adequate permission (or evidence that it is not required) will be removed.

Appendix A: non-exhaustive list of works potentially under copyright

Poetry

Prose

Dialogue (from film, theatre, television, etc.)

Lyrics

Transcripts

Music composition/notation

Private correspondence and personal information (including letters and email)

Translations

Epigraphs⁶

Software

Advertisements

Trademarks and logos

Images

Photographs (including of paintings and sculptures)

Images in which individuals are identifiable, especially children

Illustrations, sketches, and diagrams

Graphic art

Screenshots and screen grabs

ClipArt

Maps

Fiction and non-fiction

Books, essays, graphic novels, journal, magazine or newspaper articles, white papers

Letters and interviews

Social media, e.g. Facebook, Twitter, Instagram, Pinterest, YouTube, etc.

Blogs, websites, and search engines (including Wikipedia and Google)

Works by students/children

³ Unless you have substantially transformed the original through enhancement or character, i.e. to make a new work or a new critical point)

⁴ A representative list of creative works that may be subject to copyright is provided in this appendix.

⁵ CRC Press, Psychology Press, Routledge Built Environment and Routledge Behavioural Sciences.

⁶ As a rule, we do not allow epigraphs in our titles. These serve as an embellishment and are more suited to fiction or trade publishing. Should you wish to use a quotation in your work, please embed it in the text with suitable context and discussion.

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[CRC Press monograph cover designs](#)

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[Routledge \(International\) Handbook/Companion cover designs](#)

[Focus \(short form\) cover templates](#)

The choice of design is governed by the type of book, the imprint, and the series the book belongs to (if any). Where possible, we will offer you a choice of design and/or image for your book cover, so please ask your Editorial Assistant about your options.

Otherwise, your Editorial Assistant will discuss your cover design with you in the run up to manuscript submission. There is clear evidence that having a book cover image ready when your book is first publicly announced (usually around the time your book enters production) can boost its profile and potentially improve sales, so we aim to agree your cover design during the manuscript preparation stage.

New Editions

New editions of books should be planned with your Editor. The nature of the new edition and amount of revision required will determine how it should be approached and supplied, and we will advise accordingly and provide the appropriate files to be worked on.

If substantial changes and rewriting of the text is involved, it is preferable to submit a new manuscript in Microsoft Word. We can provide final (copyedited) text of the previous edition in Microsoft Word (once the new edition contract is signed).

If changes to the existing text are limited, or if the text design is complex, it is preferable to indicate changes on a PDF copy of the previous edition (which we can provide) using the in-built editing and note functionalities in Adobe Acrobat or Reader. The main thing is to ensure that revisions are indicated clearly and consistently. It may help to discuss a sample with your Editorial contact, who can check with the Production team to confirm that your approach is suitable.

If changes to the existing text are limited but substantial new sections, or even chapters, are being added, a hybrid approach is best. Mark up the PDF of the previous edition, including "insert text" indicators, and then supply the text for insertion in appropriately named separate Word documents.

For example, the first section of text to be inserted in chapter 9 would be saved in a file named 9A and an "insert text" indicator would be added to the PDF at the appropriate place stating "insert 9A here".

A few other things you will need to consider include:

Artwork

Please check with your Editorial team whether we can reuse artwork/figures from the current edition, or if these need to be resupplied.

Permission

Any permission for third-party material used in the previous edition will probably need to be obtained again.

Numbering

Any changes affecting chapter, figure, and table etc. numbering must be reflected throughout the new script or files. This may include references to that numbering elsewhere in the script and renumbering all sequential elements.