

open scholarly communication in the european research area for social sciences and humanities

Annual Report 2023





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1 Foreword



2023

2023 has seen OPERAS being deeply involved in the preparation consortium), a specific legal form for European infrastructures. At the heart of this process were many discussions that took place amongst the different OPERAS assemblies to build a sound plan and concept for the infrastructure's immediate and further future. This process is not without precedent as we have already seen such a dynamic development in recent years and it is crucial to align OPERAS' internal structures with the fast pace of its recent achievements. We are very aware of the need to coordinate the growing numbers of projects and cooperations on national, European and global levels. This is why we are working to further professionalise all of our activities on our way to becoming an ERIC.

Professionalisation also implies that there were developments within OPERAS apart from preparing the ERIC, most and foremost the results within the many OPERAS projects. 2023 saw the closing of four projects. I want to highlight the COESO project, which has strongly fostered the growth of citizen science and participatory research in the Social Sciences and Humanities; and the TRIPLE project, which has launched Go-Triple, a multilingual discovery service, which already shows proof of its expected wide-range impact. By the end of 2023, six projects continued building the growing catalogue of OPERAS services and new projects, of which I'd like to highlight CRAFT-OA and PALOMERA, added to this effort. Together with the already running DIAMAS project, they form a triad of endeavours to push forward equitable publishing. While OPERAS has supported Open Access since its start, e.g. by committing to Plan S and the Action Plan for Diamond Open Access, in 2023 Diamond Open Access became one of OPERAS' main focus areas.





This growth–more members, more projects, more services–has been possible also thanks to the very skilled and enthusiastic colleagues who joined the OPERAS Coordination Team (OCT).

While you might have gotten a rough idea by now of what 2023 had in store for OPERAS, all those aspects do not really touch the core of it. To understand the heart of OPERAS, you need to get in touch with the people who are committed to open scholarly communication in the Social Sciences and Humanities. The easiest way to do that is to attend a workshop of an OPERAS project or an OPERAS conference; or to get in touch with one of the Special Interest Groups (SIG) and support them in furthering their work on open scholarly communication.

See you soon!

Michael Kaiser (Max Weber Stiftung, Germany), Executive Assembly

A. Crasv





2 OPERAS Strategy

Making Open Science a Reality for Research in the Social Sciences and Humanities



WHAT WAS NEW?

WHAT WAS NEW? OPERAS Highlights 2023





OPERAS Strategy: OPERAS goals 2023–2025 A new and extended strategy to address the different fields of scholarly communication and develop the infrastructure



In a collaborative approach, a new strategy was set up in 2022 and 2023 that defines objectives for OPERAS and action points.

As part of the OPERAS-P project, a Strategic Plan (2019–2022) outlining the vision, mission, core values and pillars of the OPERAS Research Infrastructure was defined to support the application for the ESFRI roadmap. A lot of concrete results have already been achieved during these first 3 years, e.g. the structuration of the Association, the initial development of OPERAS services, the establishment of partnerships and the set-up of several national nodes as it was highlighted in the Annual Reports 2020, 2021 and 2022. In the new defined strategy, the vision, mission, core values and pillars remain the same, the focus of this update is on the objectives and action points, representing further implementation of the infrastructure.

2023-2025 Objectives matrix

Area / Topic → ↓	Redesigning ecosystem	Empowering community	Supporting bibliodiversity	Fostering quality
Governance and coordina- tion	(O1) OPERAS as a pan-European, effi- cient organisation and highly repre- sentative of the SSH Open ScholComm communities		(O2)The Diamond model supported as a major one in the scholarly communication ecosystem	
Portfolio of services		(O3) OPERAS services published and integrated with EOSC and other marketplaces and communities (regional, national, international)		(O4) Clear set of well-defined and operational services
Training and outreach		(O5) OPERAS mem- bers and communi- ties are trained and knowledgeable in SSH FAIR and Open Science practices		(O6) OPERAS mem- bers are trained and knowledgeable in SSH open science service delivery
Policy advising	(O7) OPERAS as a trusted advisor for national and Euro- pean OS strategies		(O8) Academic books are included in the Open Science policies	
Innovation		(O9) Supporting innovative scholarly outputs and services		

Find on the following pages these objectives, linked with the projects within OPERAS is working on these objectives.

OBJECTIVE 1. | OPERAS as a pan-European, efficient organisation and highly representative of the Social Sciences and Humanities and Open Scholarly Communication communities.

OPERAS will prepare the transition to become an ERIC. Several tasks are necessary to strengthen the governance and administrative aspects of the Research Infrastructure, in particular in the creation of its national node in Europe. The organisation gains efficiency by combining a well-structured organisation with defined processes with a flexible and agile management of the activities, consulting the communities.

SUPPORTED BY ALL PROJECTS, ESPECIALLY OPERAS-PLUS

OBJECTIVE 2. | The Diamond model is supported as a major one in the scholarly communication ecosystem.

As a result of the analysis of different Open Access (OA) models, the Diamond financing model, which does not require authors to pay fees for their research to be published, nor readers to pay for reading publications, has promised to be the most fair and equitable Open Access model yet.

SUPPORTED BY CRAFT-OA, DIAMAS

OBJECTIVE 3. | OPERAS services are published and integrated with EOSC and other marketplaces and communities (regional, national, international).

The visibility of OPERAS services is a key component to ensuring that target audiences are reached and the uptake of services is increased. This strategic objective takes a multi-pronged strategy by not limiting service discoverability to single sources that are owned and operated by OPERAS (i.e. website) and aims to leverage a variety of channels at regional, national, European and International levels (i.e. EOSC Market-place). OPERAS is also planning to reuse European Open Science Cloud (EOSC) core services such as for its own services, in coordination with the other SSH Research Infrastructures (SSHOC Tier 1).

SUPPORTED BY COESO, OPERAS-PLUS

OBJECTIVE 4. | Clear set of well-defined and operational services.

This objective covers the full service delivery lifecycle comprising the planning, development, operation, maintenance, and improvement of the service portfolio. This includes service strategies and roadmaps that will be created and updated to ensure the overall strategic alignment and promotion. In order to harmonise implementation approaches across a multi-provider federation, a formal management system will be developed to underpin continued professionalisation based on well-known standards as ISO 9000 (Quality Management) and FitSM (Service Management) with the aim of achieving organisational certification.

SUPPORTED BY COESO, OPERAS-PLUS, TRIPLE

OBJECTIVE 5. | OPERAS members and communities are trained and knowledgeable in SSH FAIR and Open Science practices

The objective is to ensure consistent knowledge of FAIR and Open Science, and supports the development of participatory research and Citizen Science a. The targets are the OPERAS members gathered in the SIGs, the SSH communities, and the civil society. The objective will be achieved by the definition of Open Science skills, the design of training modules, and the set-up of learning paths for actors of research in the SSH field.

SUPPORTED BY: OPERAS-PLUS, SKILLS4EOSC, COESO

OBJECTIVE 6. | OPERAS members are trained and knowledgeable in SSH Open Science service delivery

Training and knowledge sharing is a core principle that facilitates a collaborative environment and provides confidence to both users and providers. This objective uses a mix of both formal training and certification, informational webinars and presentations, as well as practical hands-on workshops that are tailored to the target audience. Activity coverage includes: the individual OPERAS services, the FitSM standard, as well as other more general topics such as OPERAS service alignment with EOSC and FAIR requirements, OPERAS Integrated Management System, and services and service delivery models in SSH Open Science.

SUPPORTED BY: OPERAS-PLUS, SKILLS4EOSC

OBJECTIVE 7. | OPERAS as a trusted advisor for national and European Open Science strategies

OPERAS aims to represent the SSH community in the creation, development, update and implementation of the national and European Open Science strategies, especially by focusing on open scholarly communication practices and in particular Open Access publications. OPERAS will contribute to these policies by developing relevant services to serve the needs but also by coordinating its diversity of stakeholders, amongst them the SSH researchers, in their expectations to develop successful Open Science practices.

SUPPORTED BY: CRAFT-OA, DIAMAS, OPERAS-PLUS, SKILLS4EOSC

OBJECTIVE 8. | Academic books are included in the Open Science policies

Open Science policies and strategies are potential game changers that can drive more Open Access to scholarly communication. However, OA book policies are still few and far between in the European Research Area. This objective focuses on research funding organisations, research performing organisations, and Open Access policy-makers at the national level to make well-informed OA book policies and strategies that align on a shared vision of OA to books, respecting diversity, equity, and inclusion. Facilitating an increase in OA book policies and strategies will help accelerate the transition to OA for books.

SUPPORTED BY: OAEBU DT GBB, PALOMERA

OBJECTIVE 9. | Supporting innovative scholarly outputs and services

This objective focuses on providing tailored guidance on the implementation of innovative scholarly outputs in SSH to OPERAS stakeholders, in particular authors, and developing services to support them. A multi-stakeholder, systemic approach is needed to provide support and recognition for innovative scholarly communication. This objective, stemming from the Future of Scholarly Communication report¹, will be addressed by establishing the OPERAS Innovation Lab as the knowledge hub for the OPERAS community, providing guidelines and counselling to stakeholders wishing to engage with innovative outputs, as well liaising between those stakeholders and relevant e-infrastructure providers.

SUPPORTED BY: OPERAS-PLUS

¹ Avanço, K., et al. (2021). Future of Scholarly Communication . Forging an inclusive and innovative research infrastructure for scholarly communication in Social Sciences and Humanities. Zenodo. https://doi.org/10.5281/zenodo.5017705

OPERAS as a Service Provider

Services Portfolio to support the scholarly communication community

As part of the OPERAS-PLUS project, a service management system for OPERAS was established. The services portfolio and catalogues of services were structured. The analysis of these existing services as well as new services to be captured as part of the service portfolio led to a clearer understanding of the types of services part of the OPERAS research infrastructure.

OPERAS offers a comprehensive approach to scholarly communication, supporting the entire cycle of scholarly communication and enabling greater community control over openness and accessibility. OPERAS aggregates, federates and scales up resources, providing services to increase the overall quality of Social Sciences and Humanities research.

There are three types of services provided by OPERAS:

MANAGED

Services managed by OPERAS, responsible for overall coordination, delivery and evolution.

COMMUNITY

Services managed directly by community providers but discoverable through the OPERAS catalogue. These services are required to have sustainable structures to be established, but receive direct OPERAS participation, contribution and support.

INTERNAL

Services necessary for managing and operating the OPERAS Research Infrastructure, both technical and non-technical.

These services can be grouped into eight categories: Discovery, Analytics, Quality Assurance, Research4Society, Multilingualism, Training, and Operational and Collaboration Tools. As part of this structuration process, the coordination functions of OPERAS in the service provision can be structured as followed:

Professional / Coordination Services

- Strategy and Policy Coordination
- Legal and Financial Coordination
- Community Coordination
- Communication Coordination
- Service Management and Technical Coordination
- National Nodes Coordination
- Project Management and Planning



Diamond , Open Access Landscape Study

The Institutional Publishing Landscape Report² collects and analyses the 685 survey responses

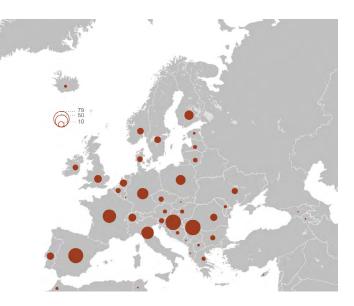
OPERAS extended its capacities and activities in the field of Diamond Open Access (OA). From March to May 2023 the DIAMAS project conducted a survey collecting information from institutional publishers and publishing service providers to illustrate the current state of Diamond Open OA within the institutional publishing landscape in Europe. The survey draws from the findings of the OA Diamond Journal Study³ and sets out to map how to support collaborative, community-driven and equitable publishing.

The Institutional Publishing Landscape Report⁴ collects and analyses the 685 survey responses, discussing not only regional, national and disciplinary differences and tendencies throughout Europe but also how institutional publishers are run and sustained, what activities they are involved in, and which services are outsourced. Furthermore, the report gives an overview of the challenges and opportunities for supporting institutional publishing in the future.

A synopsis of the report⁵ summarises the key findings.

The key findings are:

- ▶ Equitable, community-driven scholarly publishing and institutional publishing are closely linked. Therefore, efforts to further 'diamondise' scholarly publishing may prove to be most efficient when embedded in an institutional context.
- Main challenges: The further development of equitable, open scholarly publishing is hindered by a lack of sustainable funding and technical proficiency, the dependence on unpaid and voluntary work, as well as an insufficient support system. The creation of a European Research Area Diamond Capacity Hub (ERA-DCH) that will facilitate equitable OA scholarly will help to tackle these challenges.



DIAMAS survey responses per country

- ² Armengou, C., et al. (2023). Institutional Publishing in the ERA: Results from the DIAMAS survey. Zenodo. https://doi. org/10.5281/zenodo.10022184
- ³ Bosman, J., et al. (2021). OA Diamond Journals Study. Part 1: Findings. Zenodo. https://doi.org/10.5281/zenodo.4558704
- ⁴ Armengou, C., et al. (2023). Institutional Publishing in the ERA: Results from the DIAMAS survey. Zenodo. https://doi. org/10.5281/zenodo.10022184
- ⁵ Arasteh, S., & Blake, O. (2024). The European landscape of institutional publishing A synopsis of results from the DIAMAS survey. Zenodo. https://doi.org/10.5281/zenodo.10551710

The OA Book Usage Data Trust (OAEBU DT) effort under the umbrella of Fiscal sponsorship

Fiscal Sponsorship realised for OA Book Usage Data Trust



Currently, individual organisations encounter challenges when aggregating Open Access book usage data to make strategic decisions about their Open Access publishing and Open Access programs. They individually manage, compile, and link usage data metrics making it time-consuming. The Open Access Book Usage Data Trust (OAEBUDT) effort has taken on the challenge Open Access book usage data exchange and is adopting the International Data Space (IDS) model developed by the International Data Space Association (IDSA). At its core, the IDS works with the values of: 1) increased interoperability, 2) trust through secure and transparent exchange, and 3) multiparty data governance through usage controls and accountability measures.

In 2022, the Mellon Foundation awarded a project team led by the University of North Texas, OpenAIRE, and OPERAS to develop "governance building blocks" for the OAEBUDT in line with the Design Principles for IDS and emerging IDS certification specifications. Across 2023 and 2024, the project has been working on ethical data use guidelines to inform Open Access book usage data sharing agreements and technical requirements for data exchange between public and commercial Open Access book usage data creators.

Fiscal sponsorship (or fiscal hosting) refers to the practice of non-profit organisations offering their legal and tax-exempt status to groups—typically projects—engaged in activities related to the sponsoring organisation's mission.

- OPERAS proposes a comprehensive fiscal sponsorship framework:
- Fiscally hosted initiatives become a "program" operated by OPERAS
- Any work product is available to the public or to the charitable sector. OPERAS as the Fiscal Sponsor
 - Maintains all legal and fiduciary responsibility for the sponsored initiatives, its employees, and activities but
 - · Delegates the governance to a board elected/appointed by the initiatives founders / funders.
 - · Assures funders that the purposes and any restrictions of all grants and/or contributions will be met.

A Memorandum of Understanding has been established between the Open Access Book Usage Data Trust (OAEBUDT) effort community-governance Board of Trustees and the OPERAS AIBSL to allow OPERAS to fiscally manage donations and eventual technical-pilot-related contracts on behalf of the OAEBUDT effort. This step improves the OAEBUDT's ability to pursue funding opportunities in Europe while setting the stage for the technical IDS service pilots.







3 Governance & Management

Strengthening the collaboration among our members and with European institutions



OPERAS Governance OPERAS on its way to becoming an ERIC

2023 has been a full year to prepare the transition of OPERAS towards its willingness to become an ERIC. The Executive Assembly approved unanimously in May 2023 that OPERAS is supposed to become an ERIC. In order to prepare for this important step, planned for 2027, OPERAS AISBL has worked on a new governance structure by expanding its types of memberships.

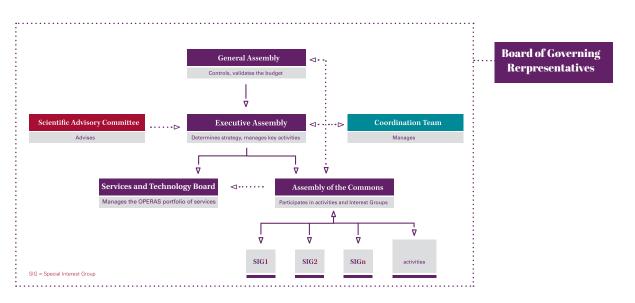
Five challenges have been foreseen:

- High risk for OPERAS to depend too much on projects funding
- Structural funding of OPERAS: unbalanced contribution from France through in-kind and regular ad-hoc subventions
- How to prepare ourselves to transition towards the funding structure of the ERIC
- GA members must have a more formal commitment to the AISBL (not possible in the Statutes actually)
- OPERAS must prepare for the potential valley of death between the end of the current infra dev and the launch of the ERIC

To secure OPERAS development and especially the services provision, the Executive Assembly, together with the Secretary General and the coordinators, have proposed to add a new type of membership: the mandated organisations. A Mandated Organisation is an organisation mandated by its Ministry or Research Council to represent the country at the level of the General Assembly (GA). This is based on the model of the EOSC-Association. Mandated Organisations do not deliver membership fees but *national contributions* that are adapted to GDP of the country or to other agreed principles and that can prefigure the creation of the ERIC (the legal mechanism used would be in the form of donations or subventions).

This proposition has been adopted by the last GA the 4th December 2023. It goes with the approval at the June GA to set up a Board of Governing Representatives (BGR), gathering the representatives of the Member States

The implementation of these changes can facilitate the distinction between the OPERAS GA and the BGR to be set up, as well as the topics to be addressed. In the OPERAS GA, topics are more focused on OPERAS activities and strategy. In the BGR, the main topic is the building of the ERIC. There might be some overlap as the overall strategy of OPERAS AISBL is the building of the ERIC but at least it is a way to distinguish between both in terms of composition and in terms of responsibilities.



Memorandi of Understanding are part of the OPERAS GA (or still ministries or research councils if they want to) and Ministries or research councils join the OPERAS BGR.

The OPERAS GA is a formal body in the context of a legal entity when the OPERAS BGR is an ad-hoc committee to prepare the ERIC.



OPERAS General Assembly

13 European countries steer OPERAS towards its way to becoming an ERIC

The General Assembly (GA) is the highest decision-making body and has the powers expressly granted to it by law or by the Articles of Association, in particular the following:



- Amendments to the Articles of Association
- Appointment and dismissal of the Statutory Auditor and the fixing of their remuneration
- Approval of the budget for the following financial year and of the annual accounts, as well as granting discharge to the Executive Assembly, the Secretary-General and the Statutory Auditor
- Voluntary dissolution of the Association
- Exclusion of Members.

The General Assembly (GA) is currently composed of EU and international infrastructures that commit to supporting the development of OPERAS, ministries (or proxies) corresponding to the countries where the core members are located, and the Chairs of the Assembly of the Commons (AoC), elected by their peers to represent the Ordinary Members at the GA. Members of the OPERAS Coordination Team attend in a supporting role.

Represented in the General Assembly:

- Croatia
- Finland
- ▶ France
- Germany
- ► Greece
- Italy
- Netherlands
- Norway
- Poland
- Portugal
- Slovenia
- Spain
- United Kingdom

Supporting Members:

- DARIAH ERIC
- ▶ DGLFLF
- Göttingen SUB
- University of Nanterre

Ordinary Members:

2 Representatives of the Assembly of the Commons



OPERAS Scientific Advisory Committee

12 experts of scientific excellence to guide OPERAS on ethical, technical and scientific matters from 12 European countries

The OPERAS Scientific Advisory Committee (SAC) is an independent body composed of twelve experts of high scientific excellence from twelve countries, who advise, monitor and provide recommendations on the ethical, scientific and technical aspects of the infrastructure and its activities. It was established in December 2020.

The SAC was steered by its two co-chairs. A monthly online meeting is fostering ongoing discussions among the members on different topics. In January the SAC met face-to-face in Brussels focusing on range of internal processes, strategic collaborations, and technical recommendations as the SAC actively engaged in planning to support OPERAS' objectives. Key points were improved communication within OPERAS bodies, effective SAC contributions to OPERAS objectives, and potential collaboration with the European Commission on terminology and translation. Specific discussions on GoTriple and the OPERAS strategic plan took place during the meeting. One of the SAC members was able to present his work on Multimedia automatic processing techniques and how they could be exploited in a scholarly communication context, opening a path to explore further research and development collaboration with OPERAS. During the cause of the year more topics were discussed regularly in monthly meetings and several experts joined the discussions to share their perspectives and projects like Almudena Fernandez from the European Commission's General Directorate of Translation discussed "Terminology work in the Spanish Department (DGT/EC)," while Susanna Fiorini from Université Sorbonne Nouvelle presented on "Translations and Open Science," exploring the role of translation technologies in supporting multilingualism in scholarly communication. At the conclusion of the year, the Committee engaged in a collective reflection regarding the structure and frequency of its meetings to better structure its efforts in 2024. In 2024, the recruitment of new SAC members will be operationalised and two topics were selected to be worked on, under the lead of the two co-chairs of the committee.



Elea Giménez Toledo



Jean-Claude Guédon

In 2022, the two new co-chairs of the OPERAS Scientific Advisory Committee were voted in:

Elea Giménez Toledo is a tenured Scientist at Institute of Philosophy, Spanish National Research Council (CSIC) since 2006. She has a PhD in Library and Information Science (University Carlos III de Madrid) and is head of ILIA: Research Team on Scholarly Book, principal Investigator of Scholarly Publishers Indicators (SPI) and coordinator of ES CIENCIA Interdisciplinary Thematic Platform, an institutional project by CSIC on Spanish as a language of scientific communication. She has coordinated the reports on Spanish Academic Book Publishing developed for Federation of Spanish Publishers (FGEE) and the Association of Spanish University Presses (UNE).

Her research is focused on academic book publishing and its connection with research evaluation of humanist and social scientists. The relevance of the academic book industry in each country, the intrinsic value of the publication of results in monographs, quality in publishing, the manuscript selection processes, bibliodiversity, multilingualism in scholarly communication, digital transformation and open access transition for small and medium size publishers are fundamental axes of her research. She is now conducting a research project on scholarly book publishing at Iberoamerican level in collaboration with the Regional Center for the Promotion of Books in Latin America and Caribbean (CERLALC) and Association of Latin American and Caribbean university presses (EULAC). She is also leading, together with Gunnar Sivertsen (NIFU, Norway), the development of Academic Book Publishers (ABP): a global and multilingual register, an initiative backed by ENRESSH COST action.

Jean-Claude Guédon, a historian of science by training, retired as "professeur honoraire" from the Université de Montréal at the end of 2018. His interest in scholarly communication started with an online journal, Surfaces – the oldest in Canada, now available on the Érudit site – that ran from 1991 until 2001. He is one of the original signatories of the Budapest Open Access Initiative and has been active in the Open Access, Open Science movements ever since. He has served as an expert for the European Commission since 2008, and chaired the Expert Group on the Future of Scholarly Communication and Publishing between 2017 and 2019. He is a member of the Scientific Board of the Nexa Centre for Internet and Society at the Politecnico of Turin and collaborates with various UNESCO initiatives on open science.

All members with one field of their expertise:

 Jonathan Chibois France, Interdisciplinary Institute of Contemporary Anthropology (IIAC), anthropology
Elea Giménez Toledo Spain, Spanish National Research Council (CSIC)/ENRESSH, Literature and Digital Humanities
Jean-Claude Guédon Canada, Université de Montréal (professeur honoraire), Literature
John Howard Ireland, University College Dublin/Coláiste Ollscoile, Baile Átha Cliath, Archaeology, Anthropology, History and Philosophy of Science
Mikolaj Leszczuk Poland, AGH University of Science and Technology, Telecommunications
Samual Moore United Kingdom, Coventry University, Digital Humanities
Anna Neovesky

Germany, Academy of Sciences and Literature, Mainz, Digital Humanities

Federico Pianzola

Italy, University of Milano-Bicocca and Sogang University, Literature

Elena Šimukovic

Lithuania, Zurich University of Applied Sciences (ZHAW), Science and Technologial Studies

- Erzsébet Tóth-Czifra Hungary, DARIAH, Linguistics
- Koen Vermeir Belgium, CNRS, Philosophy of science
- Irena Vipavc Brvar Slovenia, CESSDA, Statistics

OPERAS Executive Assembly

13 prominent national organisations committed to steer OPERAS on its path to maturity

The Executive Assembly is the day-to-day governing and decision-making body of the OPERAS AISBL. It is composed of ten prominent national organisations (OPERAS Core members) from ten European countries, that commit to steer OPERAS on its path to maturity.

Franjo Pehar/ Croatia



University of Zadar / Franjo Pehar is Associate Professor and Head of the Laboratory for Interactive Systems and User Experience. He also serves as the Director of the Doctoral Study "Knowledge Society and Transfer of Information" and is focused on scholarly communication, bibliometrics, digital publishing, and HCI.

Lea Ryynänen-Karjalainen/ Finland



Federation of Finnish Learned Societies / Lea Ryynänen-Karjalainen is the Executive Director of the Federation of Finnish Learned Societies since 2014. Before the Federation she has worked as the Vice Rector of the Metropolia University of Applied Sciences, senior science adviser at the Research Council of Finland and several university management positions.

Vassiliki Apostolopoulou / Greece



National Documentation Centre

She joined EKT as a Research Associate working on an EU-funded project focusing on scholarly communication and Open Science policies. She holds a PhD in Political Philosophy, and she is a postdoctoral researcher in the field of Performing Arts.

Niels Stern / Netherlands

OADEN



Niels Stern is Managing Director of OAPEN and Co-director of DOAB. He began his career in scholarly book publishing in 2003.



Michael Kaiser / Germany

Max Weber Stiftung

Michael Kaiser is a historian and Director of the department perspectivia.net, library and IT affairs at the headquarters of the Max Weber Stiftung (MWS).

Lionel Maurel / France



CNRS / Lionel Maurel is Scientific Deputy Director at the National Institute for Humanities and Social Sciences of the CNRS (French National Centre for Scientific Research). Two units in the CNRS are particularly involved in the development of the OPERAS AISBL: OpenEdition and Huma-Num.

Elena Giglia / Italy



University of Turin

Elena Giglia, PhD in Italian literature, Masters' Degree in Librarianship and Masters' Degree in Public Institutions Management, is Head of the Open Access Office at the University of Turin.

Monica Roos / Norway



erih+ / Monica Roos is a Senior Advisor at The Norwegian Directorate for Higher Education and Skills. She has the overall responsibility for the technical and professional developement erih+ and the Norwegian Registry. She has 20 years experience in Academic Publishing and Open Science.

Maciej Maryl / Poland



The Institute of Literary Research of the Polish Academy of Sciences Maciej Maryl is Assistant Professor

and Deputy Director of The Institute of Literary Research of the Polish Academy of Sciences (IBL PAN) and founding head of the Digital Humanities Centre.

Delfim Leão / Portugal



Delfim Leão is Full Professor at the Institute of Classical Studies at the University of Coimbra. Former Director of Coimbra University Press (2011–2021), he is Vice-Rector for Culture, Communication and Open Science.

Aleš Pogačnik / Slovenia



The Research Center of the Slovenian Academy of Sciences and Arts Aleš Pogacnik is Editor-in-chief and General Manager of Založba ZRC, publishing unit of ZRC SAZU. He holds an MA in Philosophy.



Pilar Rico-Castro / Spain

FECYT

Pilar Rico-Castro is Head of the Open Science Unit at FECYT National Representative at the National Points of Reference for Open Science and at the EOSC SB Expert Groups of the EC. National Expert at the Horizon Europe Programme Committee Research Infrastructures.

Graham Stone / United Kingdom



Jisc

Graham Stone is Jisc's subject matter expert for OA monographs. He is the Lead for Communications on OA monographs within Jisc and is responsible for developing and managing strategic relationships.



Frank Manista / United Kingdom

Jisc / deputy / Frank Manista is a Policy and Engagement Manager at Jisc. He engages with teams at Jisc who participate in EU-wide projects and ensures the awareness inside Jisc on the different engagements and the promotion outside, particularly around Open Access.





OPERAS is: 64 major organisations, including 9 new member in 2023

Members of the Executive Assembly



▶ 64 major organisations → 23 countries



In 2023, OPERAS welcomed 3 new core members from 3 countries, 1 supporting member and 5 new ordinary members

Core members

The Federation of Finnish Learned Societies (TSV)



Federation of Finnish Learned Societies

Established in 1899, TSV stands as a pivotal national cooperative body in Finland, fostering collaboration among learned societies, enhancing scholarly communication, and advocating for the utilization and recognition of research findings. It notably manages the Journal.fi platform, offering Open Access publishing services to its members, and supports the Edition.fi service for Open Access monographs.

This partnership is a testament to both OPERAS and TSV's commitment to promoting Finnish science on an international scale, with a particular focus on multilingualism in scholarly communication – a commitment highlighted by their collaboration on the Helsinki Initiative and various projects aimed at supporting Diamond Open Access Journals and addressing challenges in multilingualism and gender equity. The inclusion of TSV in the OPERAS Executive Assembly not only marks Finland's representation in this esteemed group but also underscores a shared dedication to enhancing the visibility and impact of Finnish research globally. Through this collaboration, OPERAS and TSV are set to enrich the scholarly communication landscape, emphasizing the crucial role of national languages and the unique challenges faced by small-scale, non-profit SSH publishers in Europe and beyond.

Spanish Foundation for Science and Technology, F.S.P. (FECYT)

As the national node for Spain, FECYT's integration into OPERAS is a milestone that reflects a shared commitment to advancing Open Science. This partnership aligns perfectly with Spain's recent strategic moves towards Open Science, including the National Open Science Strategy and legislative reforms that support open access and scientific dissemination. FECYT, a public foundation under the Ministry of Science and Innovation, is at the forefront of developing institutional Open Access publishing models through its leadership in the DIAMAS project, the first of its kind funded by Horizon Europe. This initiative aims to establish European standards for good publishing practices, a goal that resonates with OPERAS's vision.

FECYT's role extends beyond project leadership; it is instrumental in providing technical support, funding, and certification services to Spain's academic publishing community. This includes professionalization services for scientific journals, assessment calls for journals and monograph collections, and the operation of RECYT, an OJS-based open edition platform. By joining OPERAS, FECYT will not only facilitate the implementation of Spain's National Open Science Strategy but also contribute to the development of a sustainable, non-commercial, and public-based digital infrastructure for scholarly communication. This membership is expected to enhance the internationalisation of FECYT's public services, leveraging its involvement in significant international networks and initiatives such as the EOSC Steering Board, the EOSC Association, OpenAIRE, LA Referencia, and COAR. FECYT's incorporation into OPERAS marks a significant step towards fostering an ecosystem of science that is accessible, interoperable, and open, reinforcing Spain's role in the global scientific community and furthering the impact of Spanish research and scholarship on an international scale.

erih+

erih+ is a European journal index covering the Social Sciences and Humanities field, providing a list of quality-checked journals. The services are placed in the Norwegian Directorate for Higher Education and Skills where also the Norwegian Register for Scientific Journals, Series and Publishers are placed. The two journal indexes work together in several areas to ensure quality and efficiency in both lists. The erih+ services also consist of an article service which is powered by Dimensions. They harvest articles from the indexed (approved) journals and present the articles in a powerful article search: https://erih. dimensions.ai/discover/publication The article search is free and open and provide full-text in the cases where the articles are open access. The erih+ journal index is also a free and open-to-all service.

Supporting member

Paris-Nanterre University

Paris-Nanterre University is a versatile French university institution, offering a diversified range of academic programs and research activities that encompass a broad spectrum of disciplines in the humanities and social sciences. Each year, it welcomes over 35,000 students. Its network of university libraries comprises 14 establishments.

The library of Paris-Nanterre University offers a variety of collections in paper format, including books, theses, journals, films, DVDs and access to online documents. These resources are available through several dozens of databases, which offer ebooks, scientific journals (all systematically referenced individually in our catalog), online encyclopedias, legal precedents, press articles, as well as various specialized online corpora.

Ordinary member

Agencia Estatal Consejo Superior De Investigaciones Cientifícas (CSIC)

The Spanish National Research Council State Agency (CSIC) is the largest public research organisation in Spain, the fourth-largest public research institution in the European Union and the sixth in the world. Attached to the Ministry of Science and Innovation, with independent legal personality, the CSIC plays a key role in scientific and technological policy in Spain and around the world.

Its aim is the promotion, coordination, development and dissemination of multidisciplinary scientific and technological research to contribute to the advancement of knowledge and economic, social and cultural development, as well as the training of personnel and advice to public and private entities in these fields.

The CSIC carries out research, innovation and training in all fields of knowledge – from the most basic or fundamental aspects of Science to the most complex technological developments – distributed in three global areas: Life, Society and Matter.

Lorraine University

UNIVERSITÉ With an outreach across 2 metropolises, 10 towns & cities and urban areas within its region, Université de Lorraine invests wholeheartedly in knowledge production and sharing. It is committed to raising the level of citizens' educational attainment through intensive research involving both the basic and applied strands. Université de Lorraine resolutely committed itself to the path of Open Science at the beginning of the decade 2010, leading to the first seminar on the subject in 2016. Since then, this commitment has been gradually expanded, with a series of annual colloquia, institutional and financial support for open editorial initiatives, and the adoption of the national archive HAL as the University's official bibliography in 2018. Since 2019, a dedicated steering committee has been at work, accompanied by three operational committees on open publication, data and software, with the aim of providing researchers with a secure environment to enable them to more easily cope with current developments in the world of research.

University Press of Rennes



Established in 1984 at the initiative of the teaching staff and researchers at Rennes 2 University, the University Press of Rennes (PUR) emerged with the aim of overseeing the publication and promotion of research outcomes in the field of humanities and social sciences. Over time, this editorial network expanded to include 12 partner universities, thereby contributing to making PUR one of the most influen-

tial public publishing houses in France. Their mission is to disseminate a wide range of disciplines in the Francophone world. The adoption of an independent and quality-focused editorial policy is ensured by the presence of an editorial committee composed of representatives from the 12 partner universities.

The purpose of the Presses Universitaires de Rennes is to closely reconcile scientific rigor with the imperative of dissemination among the most diverse segments of society. This reconciliation is based on a dual conviction, upheld on a daily basis: firstly, the certainty that publication constitutes the arena where sciences are put to the test and where they demonstrate their validity (through criticism and debate, the demonstration of rationality and argumentation); secondly, the belief that solid, clear, and distinct publications represent the privileged tool not only for the advancement of knowledge but also for the education, instruction, and emancipation of all citizens.

The University Presses produce specialized collections for research, publishing textbooks in a series called Didact; distributing journals, and creating essays and books with illustrations to reach a broader audience. All publications are available in libraries, can be ordered from their website, or accessed directly through electronic open-access platforms, including the most notorious in the country such as Cairn, Numilog; OpenEdition Journals; OpenEdition Books; and Persée.

University of Cyprus

University of Cyprus Library The University of Cyprus has the largest university library in Cyprus in terms of building and collection. Accordingly, the Library (established in 1992) managed to gain the respect of the academia and the general public of Cyprus and soon was able to participate in consortia and networks of Europe and beyond. In December 2018 the Library relocated to its new premises, the Learning Resource Centre – Library "Stelios Ioannou" on the University Campus. The building houses all Library functions, services and collections, which spread to five levels combining stacks, reading rooms, work stations, study areas, a 24-hour reading area, as well as a children's library in a dedicated, specially designed area. The building has 950 seats for studying in all levels, including 31 four-seat and six-seat group study rooms.

Among other tasks and projects, for the last 15 years the University of Cyprus Library is actively supporting the European Commission's vision for Open Science. Since 2009, the Library has been participating in European projects and acting as the Only National Open Access Desk (NOAD) in the country.

Thoth



Thoth is a metadata management and dissemination platform and service specifically tailored to tackle the problems of getting Open Access books into

the wider supply chain. Thoth enables publishers to ingest, create, manage and export fully open, CCO-licensed metadata for their books in a variety of formats and platform-specific flavours of e.g. MARC, KBART, JSON, and ONIX via open APIs, and facilitates the dissemination of OA books to metadata and content aggregator platforms as well as into repositories participating in the Thoth Archiving Network.

OPERAS Assembly of the Commons

OPERAS community actively engages in in the development of the OPERAS Research Infrastructure

The Assembly of the Commons (AoC) gathered twice in 2023. The first AoC was held in April and the second one in May 2023.

The purpose of the first Assembly of the Commons was to present OPERAS' annual Implementation Plan and to collect contributions and feedback from the OPERAS community. This meeting gave the OPERAS ordinary members the opportunity to learn more about OPERAS strategy for the following years and to actively take part in the process. Vanessa Proudman and Mark Huskisson chaired the meeting and the Implementation plan was presented by members of the OPERAS Coordination Team (Pierre Mounier, Yannick Legrè and Karla Avanço).

During the May 2023 meeting, the Special Interest Groups presented their current and planned work and highlighted how their objectives and activities are aligned with the OPERAS Implementation Plan. Around 40% of the ordinary members were represented in each of the Assembly of the Commons.



Vanessa Proudman is the Director of SPARC Europe with 20 years of management experience in facilitating access to knowledge through Open Access, Open Science, Open Culture and Open Education in Europe. She is advocating for change to increase more equitable access to knowledge through international, national and regional policymaking and extensive advocacy work. Prior to SPARC Europe, she worked at Tilburg University on various international initiatives, was programme manager at Europeana and led a department on information and IT at a UN-European region research institute in Vienna for over 10 years.



Mark Huskisson is responsible for Business Development at the Public Knowledge Project (PKP), the developer and stewards of OJS, OMP, and OPS. PKP develops open-source software systems that manage the complete scholarly publishing workflow for journals, monographs, and preprints, and conducting scholarly communication research on questions of Open Access and Open Science.





OPERAS Service and Technologies Board

The Services and Technology Board (STB) is responsible for managing the portfolio of services and associated technologies regarding OPERAS AISBL and OPERAS federated services. This includes all services that are planned, live or to be retired/discontinued. The STB conducts regularly scheduled service reviews. It also collects inputs from other relevant groups or leaders such as Executive Assembly, General Assembly, OPERAS Coordination Team, Special Interest Groups, Scientific Advisory Committee, etc. for research community needs and evolution of technology. Responsibilities include:

- Advise OPERAS management on the priorities for evolving the service portfolio
- Conduct regularly scheduled service reviews with service owners
- Maintain a service strategy and implement the recommendations from the OPERAS GA, EA, OCT and SIGs
- Steer the creation, review and approval of service design and transition packages, including descriptions and specifications alongside any information to be added to the service portfolio
- Ensure that major changes to services and solutions are endorsed by the process managers/owners

Obtain approval from the relevant governance bodies for all new services and services to be discontinued. The STB holds regular monthly meetings.

OPERAS Coordination Team

The OPERAS Coordination Team provides several different coordination, management and secretariat functions for the OPERAS Research Infrastructure to support, liaise and advise the Executive Assembly and the different bodies of OPERAS. It gathers a variety of expertise and knowledge to support the building of OPERAS as an ERIC in areas such as: Strategy and Policy; Legal and Financial; Community and Communication; Service Management and Technical Coordination; National Nodes; and Project Management and Planning.



OPERAS Coordination Team at a Meeting in December 2023 in the office in Brussels.



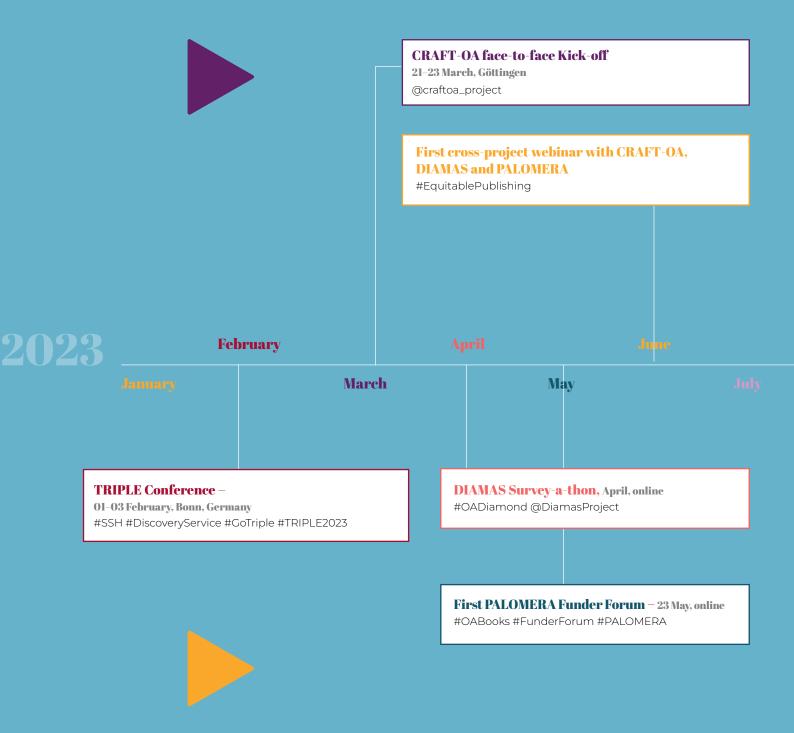




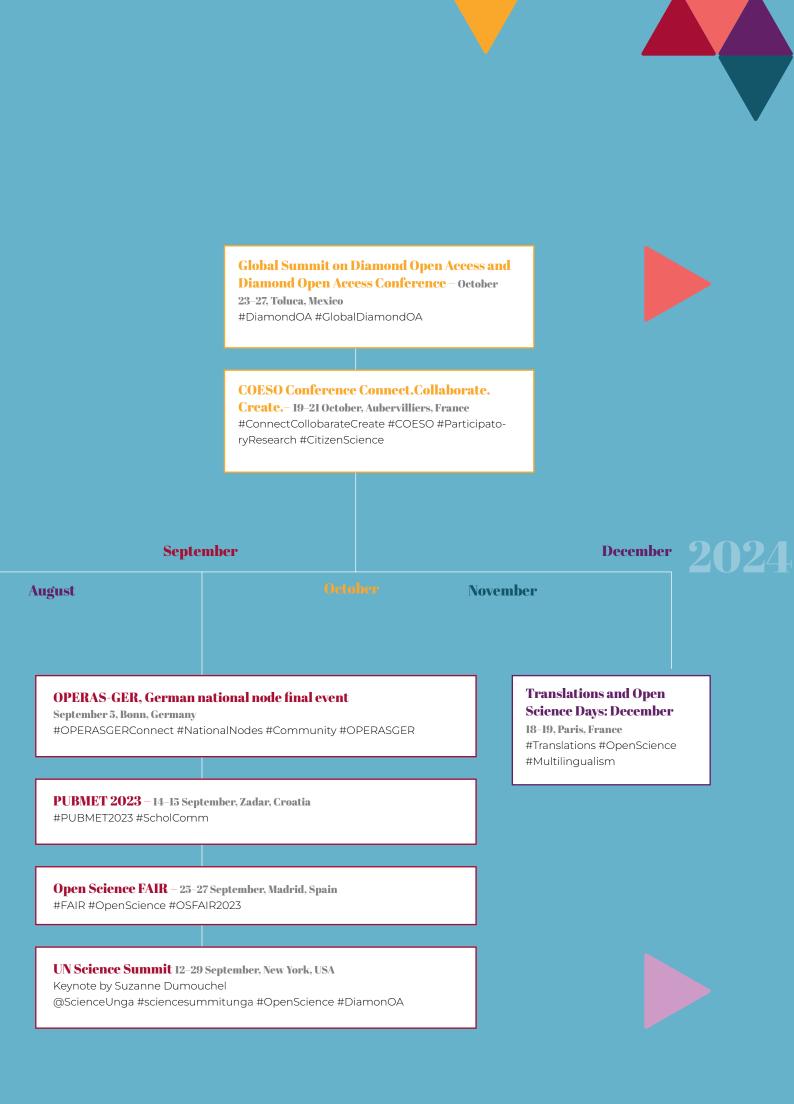
Engaging with the community: Presenting results and learning about the community's needs







OPERAS and the consortia of its projects organised 126 events and workshops and presented at several large Open Science events to network and engage with the community and different stakeholder groups. This page only shows a small selection of different events and presentations for different stakeholders. Some events and activities are highlighted on the following pages.



Focus on ► Global Summit on Open Access

The purpose of the Global Summit on Diamond Open Access is to bring the Diamond OA community together in a dialogue between journal editors, organisations, experts, and stakeholders from all continents. This unique event consists in a series of hybrid and multilingual events organised from 23 to 27 October 2023 in Toluca (Mexico) by Redalyc, UAEMéx, AmeliCA, UNESCO, CLACSO, UÓR, ANR, cOAlition S, OPERAS and Science Europe.

In the conclusions the way forward was described.¹ The results of the 2nd Diamond Open Access Conference are published in a report.²



The Global Summit on Diamond Open Access was an event that brought together 688 participants from 457 institutions and 75 countries. A global community actively collaborating to promote the consolidation of the Diamond Open Access Model.





¹ https://operas.hypotheses.org/6792

² Saenen, B., Ancion, Z., et al. 2024, Februar 20). 2nd Diamond Access Conference Report. 2nd Diamond Open Access Conference, Toluca, México. https://doi.org/10.5281/zenodo.10683099

Focus on ► TRIPLE final conference: "Improving Discovery and Collaboration in Open Science"

In February 2023, the final conference of the TRIPLE project brought together 154 participants from 19 European countries to discuss how to improve discovery and collaboration in Open Science, particularly with a focus on the main output of the TRIPLE project, the multilingual and multidisciplinary GoTriple Discovery platform. 3 keynotes, 4 workshops, 10 presentations and two roundtable discussions shed light on topics such as Metadata, Knowledge Production and A.I., collaboration and multilingualism and scholarly communication.



3 keynotes

4 workshops

10 presentations

2 roundtable discussions

154 participants

Focus on ► COESO's final conference: "Connect.Collaborate.Create. Bridging communities to foster participatory research and citizen science"

In October 2023, the Connect.Collaborate.Create. conference brought academia and society together in Paris (Campus Condorcet) to address citizen science and participatory research in the social sciences and humanities disciplines. With 170 participants from across four continents, 3 keynotes, 27 breakout sessions, 2 plenary panels, 16 posters, and organised networking activities, the 3-day event cultivated knowledge exchange, idea generation and networking among citizen science practitioners, funders, policy makers, ethics experts and more. Co-organised by the COESO project and the PRO-Ethics project, both funded by the EU Horizon 2020 research and innovation programme, the conference covered a range of topics, including: developing better support services and research infrastructures for participatory research; evaluation and assessment of citizen science; the responsibilities of policy makers to enable a democratic scientific system; how funders can facilitate meaningful societal participation in research; and more. The full program and links to reflective blog posts from a variety of participants are on the website.



170 participants27 breakout sessions16 posters

3 keynotes2 plenary panels

Focus on ► UN Science Summit

In her Keynote at the UN Science Summit in New York Suzanne Dumouchel, OPERAS Partnerships Coordinator, and Director of the EOSC Association, linked the future of people-centred science with the discours on Open Science, community-led publishing and Diamond Open Access. OPERAS was honoured to be part of the discussion on the next internet generation:

Suzanne Dumouchel described the role of science in moving from technical to human and social needs by installing community labs and a Diamond protocol for all.



Working together on the future of the internet: Bob Kahn, Suzanne Dumouchel, Vinton Cerf at the UN Science Summit

UN Science Summit

Session: People Centered Science and Digital Regulation leading to a People Centered Future (210913), Friday September 22, 4.15 pm CEST

Keynote: Suzanne Dumouchel, OPERAS Partnership Coordinator, Director of the EOSC Association





Science Summit at UNGA78 12-29 September 2023



OPERAS National Nodes Activities

OPERAS established a roadmap for national nodes in 2023

The development of the OPERAS National Nodes received a great boost during 2023 with the creation of the first roadmap for all the existing and future nodes of the OPERAS Research Infrastructure. Within the work carried out during the year, guidelines were established for the existence and sustainability of the nodes, which represent OPERAS at the national and local levels and grasp the needs of each national community.

The nodes active on the OPERAS-PLUS project established a vision for the OPERAS nodes, together with a strategy to be followed during the coming years. The strategy organises as well requirements and metrics to be collected and supported in each national community. OPERAS currently has 13 national representatives that are supported by the OPERAS Coordination Team to build-up national communities.

The OPERAS-PLUS Work Package 7, which is dedicated to supporting the national nodes, has also put together efforts to deliver a second report on the OPERAS national nodes challenges and opportunities.

All in all the nodes presented OPERAS and their national activities at 16 external events and organised 4 conferences themselves. OPERAS-SL and OPERAS-HR both organised a first event to officially start their national communities. All together they organised 4 trainings on OPERAS services, 3 on FAIR-related topics and 3 on Open Science topics and impacted more than 230 people in their countries with this trainings.

Highlights

OPERAS-GER Final Event, 05 September 2023, one day on-sight, with 40 participants

OPERAS-HR (kick-off), 16 June 2023, hybrid, 60 participants

OPERAS-SL Presentation of the OPERAS infrastructure and the GoTriple service: discovering research results in the social sciences and humanities, 14 April 2023, virtual, 23 participants

OPERAS



OPERAS

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OPERAS-PL, Representation at the DH2023 in Graz, 10 to 14 July 2023



The Special Interest Groups 7 Special Interest Groups gathering from OPERAS members

The Special Interest Groups (SIG) are an important part of the OPERAS engine. Due to their nature, the SIGs are the groups capable of identifying needs and challenges coming from the broader community. Such needs and challenges can then be addressed by OPERAS through projects and the development of new services. Furthermore, the SIGs represent a forum to produce feedback and to assess if OPERAS activities meet the needs of the community.

OPERAS (SIGs) gather experts and promote an international, multi-disciplinary working atmosphere. The groups are open to all members of the OPERAS community.

The SIGs are still using a roadmap as a planning tool for detailing yearly activities and align objectives with OPERAS' strategies, methods, and ongoing projects.

Highlights of 2023

The **Advocacy Special Interest Group** organised an Open Chat Series⁶ with experts in advocacy and communications, researchers, publishers and other members of the SSH community. The series highlighted the connection of the SIG with OPERAS services, such as Go Triple⁷ and the Innovation Lab⁸. The series received some general communication support to advertise the events from the OCT

The **Best Practices Special Interest Group** defined their modus operandi of contribution and collaboration primarily with the Horizon Europe funded DIAMAS project⁹. The SIG participants represented the OPERAS community as experts in best practices and provided feedback on the first version of the Extensible Quality Standard for Institutional Publishing (EQSIP)¹⁰, an output of the DIAMAS project

How-to-advocacy: An OPERAS "open chat"

How to Advocate for Innovation in Scholarly Communication?

OPERAS 29 March 2023, 11:30-12:30 CEST

⁶ https://operas-eu.org/special-interest-groups/advocacy-2/how-to-advocacy/

⁷ https://www.gotriple.eu/

⁸ https://lab.operas-eu.org/

⁹ https://diamasproject.eu/

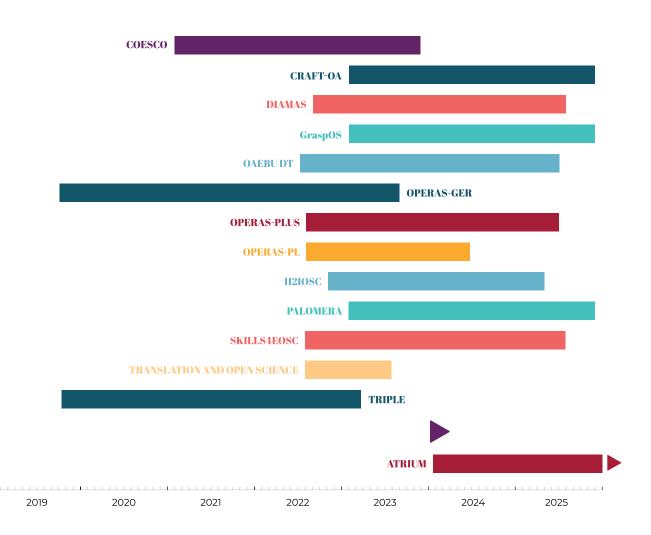
¹⁰ Armengou, C., Redhead, C., & Rooryck, J. (2023). D3.5 Extensible Quality Standard in Institutional Publishing (EQSIP) V1.0_approved by the EC. Zenodo. https://doi.org/10.5281/zenodo.10406062

Projects OPERAS and the Executive Assembly participated in 13 projects running in 2023

OPERAS had in total of **13** active projects in 2023: **3** new (GraspOS, Craft-OA, PALOMERA), **4** closed (COESO, Triple, Translation, OPERAS-GER), and **6** running projects (Skills4EOSC, DIAMAS, Advancing to Launch by Developing IDS Governance Building Blocks – as part of the OAEBU DT effort, OPERAS-Plus, OPERAS-PL, H2IOSC). **1** proposal (ATRIUM) was submitted in 2023 and, with the funding approval, will start in 2024.

Among all, **9** projects receive EU grants via Horizon 2020 and Horizon Europe Programs. OAEBU DT's current project is supported by the Mellon Foundation (United States) while **4** OPERAS node projects receive national fundings from France, Poland, Italy, and Germany. With different levels of involvement, OPERAS contributes either by participating as a key member or acting as a coordinator leading overall project management and implementation.

In 2023, OPERAS broadened and deepened its impact via projects at national, pan-European, as well as international level. The projects support the infrastructure in developing different areas:



Research Infrastructure

On its path to becoming operational as an ERIC in 2028 and selected as an infrastructure in the ESFRI Roadmap, OPERAS aims to structure, develop, and consolidate the European Research Infrastructure ecosystem and open Social Sciences and Humanities scholarly communication. **OPERAS-PLUS**, funded by Horizon Europe Programme, carries the mission to support new ESFRI Research Infrastructure projects in their preparatory phase. **OPERAS-GER, OPERAS-PL** and **H2IOSC**, as national node projects, contribute and strengthen the linkage of RIs landscape. **ATRIUM** aims to advance frontier knowledge in the scope of Arts and Humanities by building Research infrastructures services.

Open Access: Diamond OA Model of Publishing, Policy Alignment of Open Access Monographs, Open Access Books

OPERAS commits to the transition of Open Access (OA) for scholarly communication with projects addressing a wide range of access aspects.

By improving technical infrastructure for publishing with tools, resources as well as services, and enhancing operational capacity of scholarly publishers and service providers, **DIAMAS** and **CRAFT-OA** foster the growth of Diamond model of Open Access publishing that upholds access quality, sustainability, usability, and equity. **PALOMERA**, speeds up the transition and alignment to Open Access for academic books by supporting the development and implementation of Open Access book policies and strategies. To answer the challenge of aggregation, curation and benchmarking of Open Access book usage data, the **OAEBU DT effort** works towards launching a data space (adapted from the international data spaces (IDS) data space model) to facilitate exchanging reliable OA book usage data in a trusted, equitable, and community-governed way.

Open Science: Practices of Citizen Science & Innovation

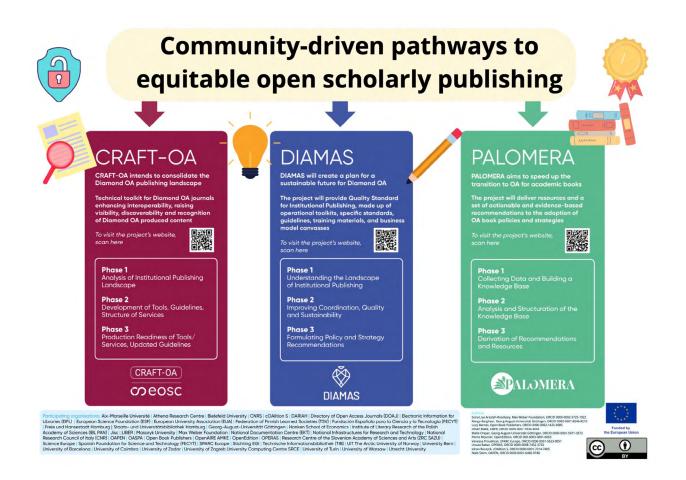
OPERAS' ambition is to remove barriers in the SSH scholarly communication system and make Open Science a reality for the European Research Area and the world beyond.

One of the innovative practices was put in place through **TRIPLE** discovery service which acts as a metadata navigator for local repositories, national and international aggregators. Connecting research and society, **COESO** supported 10 citizen science pilots. Together they collaboratively designed a common platform VERA, which is one of the OPERAS core services, to co-create new knowledge and community solutions. **Skills4EOSC** is building an Open Science and FAIR training ecosystem relying on common methodologies and Competence Centers that will be set up within the EOSC environment. **Translations and Open Science** tackled challenges to multilingualism by exploring new translation processes and technologies based on the community needs and **GraspOS** builds an open and trusted federated infrastructure to support and enable reforms towards open science-aware responsible research assesment.



Project Name	Start	End	Funding Information	Coordinator	Website/further infor- mation
COESO	Jan. 2021	Dec. 2023	H2020-SwafS-27-2020	EHESS / OpenEdition	coeso.hypotheses.org/
CRAFT-OA	Jan. 2023	Dec. 2025	HORIZON-IN- FRA-2022-EOSC-01	UGOE	craft-oa.eu/
DIAMAS	Sept. 2022	Aug. 2025	HORIZON-WIDE- RA-2021-ERA-01	Université Aix Marseille / OpenEdition	diamasproject.eu/
GraspOS	Jan. 2023	Dec. 2025	HORIZON-IN- FRA-2022-EOSC-01	ATHENA – R&I CENTER	graspos.eu
OAEBU DT	Jul. 2022	Jun. 2025	Mellon Foundation	UNT	www.oabookusage. org/
OPERAS- GER	Oct. 2020	Sept. 2023	Federal Ministry of Eduation and Re- search Germany (BMBF)	MWS	operas- ger.hypotheses.org/
OPERAS- PLUS	Sept. 2022	Jul. 2025	HORIZON-IN- FRA-2021-DEV-02	MWS	operas-eu.org/pro- jects/operas-plus/
OPERAS-PL	Sept. 2022	Aug. 2024	Polish Ministry of Ed- ucation and Science	IBL PAN	operas.pl/
H2IOSC	Nov. 2022	Apr. 2025	NextGenerationEU – NRRP M4C2	CNR	https://www.h2iosc. cnr.it/
PALOMERA	Jan. 2023	Dec. 2025	HORIZON-WIDE- RA-2022-ERA-01-42	OPERAS/ OAPEN	operas-eu.org/pro- jects/palomera/
Skills4EOSC	Sept. 2022	Aug. 2025	HORIZON-IN- FRA-2021-EOSC-01	GARR consor- tium	www.epos- eu.org/skills4eosc
Translation and Open Science	Sept. 2022	Aug. 2023	French National Fund	OPERAS	operas-eu.org/ projects/ translations-and- open-science/
TRIPLE	Oct. 2019	Mar. 2023	H2020- INFRAEO- SC-02-2019	CNRS	www.gotriple.eu/
To Come in 2024					
ATRIUM	Jan. 2024	Jun. 2027	HORIZON-INFRA- 2023-SERV-01-02	DARIAH	https://atrium-re- search.eu/

Focus on 🕨 💐 PALOMERA



The PALOMERA project (Policy Alignment of Open Access Book Monographs in the European Research Area, Jan 2023 – Dec 2024, funded by the European Union)¹¹ seeks to understand why so few Open Access (OA) funder policies include books, and to provide actionable recommendations to change this.

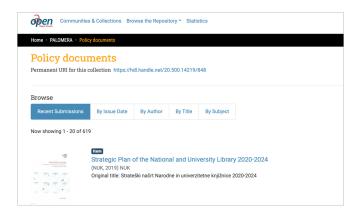
After kicking off the project in January 2023, the initial phase of data collection started where the project collected around 900 documents across 29 countries. Within this process, more than 450 policies were preliminarily analysed by the research team to draw the policy map needed in the second phase happening in the first two quarters of 2024. At the same time, numerous online public events were held to consult with different stakeholder types (publishers, researchers, librarians, infrastructure providers, policymakers, funders and similar) to feed into the project's information-gathering phase. Additionally, the project prepared itself for the very first validation event with the aim to hear feedback from the community on the gathered documents and make sure it captures anything missing. This was marked by announcing the PALOMERA Knowledge Base¹², which can already be used for browsing all the documents that have been collected. This tool is set to become a significant resource in its own right and provide insights into the policy landscape for OA books, and the needs, gaps and perspectives for further policymaking.

Another very important output established by the PALOMERA project is the Funder Forum. The idea of creating a Funder Forum surfaced when several European research funders (including FWF, SNSF, NWO,

https://operas-eu.org/projects/palomera/

¹² https://knowledgebase.oabooks-toolkit.org/communities/d1a1c329-7b66-44ff-b888-c1573a3cac85

UKRI, DFG, ERC and the EC) participated in a workshop on OA books in October 2021 organised by OAPEN. A common interest was expressed to have OAPEN coordinate a forum where research funders can convene to discuss OA books. As scientific coordinator of the PALOMERA project, it now makes sense to install this forum, and also use it to address OA book policymaking across Europe, which is diverse and not yet widespread. The Funder Forum facilitates the exchange of practices and experiences between research funders about



policies designed to promote OA of academic books, and – where possible – align such policies and practices. It explores ways to deal with challenges and obstacles identified by the participants collaboratively. In 2023, there were two Funder Forum events organised with others planned in 2024 already. This was accompanied by the publication of the PALOMERA's first policy brief¹³ including recommendations on supporting this particular type of discussion forum.

Finally, PALOMERA has joined forces with two sister projects, CRAFT-OA and DIAMAS, also funded by the European Union, in a cross-project collaboration effort towards *Creating Community-Driven Pathways to Equitable Open Scholarly Publishing*. In a webinar series, conference presentations, meetings and other events, this collaboration aims to share the projects' joint efforts with the community, discuss the nature of 'community-driven' projects and listen to questions that need to be answered.

To conclude its work, the PALOMERA project is set to deliver the resources and a set of actionable as well as evidence-based recommendations for the adoption of OA book policies and strategies by the end of 2024.

Focus on > The Translation and Open Science project

The Translations and Open Science project was launched in 2020 by the French National Fund for Open Science (FNSO) with the aim to explore the role of technology-aided translation in promoting multilingualism in scholarly communication. Following a first report¹⁴ published in 2020, four exploratory studies were conducted in 2022–23 under the coordination of OPERAS in order to assess the feasibility of a technology-aided, collaborative translation service for open scholarly communication, combining digital language resources, translation technologies and human skills. In particular, the studies aimed to:

- Identify translation-related needs, practices and tools of the main stakeholders in scholarly communication;
- Map and collect existing bilingual publications in order to build specialised language resources, in particular translation memories and terminology databases;
- Evaluate a selection of machine translation engines in a variety of scenarios of scholarly communication;
- Suggest a sustainable operating model for the future service.

¹³ Niels Stern, Johan Rooryck. (2023). D4.1 – PALOMERA 1st Policy Brief: Alignment beyond PALOMERA (1.5). Zenodo. https://doi.org/10.5281/zenodo.8402385 and https://operas-eu.org/projects/palomera/results/palomera-1st-policy-brief/

¹⁴ https://hal-lara.archives-ouvertes.fr/OUVRIR-LA-SCIENCE/hal-03640511



Susanna Fiorini presents the Translations and Open Science Project at the TRIPLE final conference.

The four studies involved some 60 participants including researchers, publishers, academic translators, technical and editorial staff from dissemination platforms, librarians, legal experts, research engineers, academic students, and decision makers.

Project outcomes

The picture that emerged from the studies shows a great diversity of existing translation needs and practices, with the same diversity being found in the landscape of translation tools, some of which offer better performances but not without raising a number of questions regarding ethics, transparency and independence. Such findings prove that an informed but flexible approach is required for the development of the future service, which should serve as a meeting point for the interests of the different stakeholders in multilingual scholarly communication.

More information about the project and the four exploratory studies can be found on the following pages:

- ▶ Translations and Open Science page on OPERAS website¹⁵ (in English)
- Project blog¹⁶ (in French)
- > Translations and Open Science page on the FNSO website¹⁷ (in English and French)

The project was presented at 11 events during the period 2022–24 throughout Europe (France, Germany, Italy, Portugal) and in Canada. The two-day workshop that marked the end of the current phase of the project – the *Translations and Open Science Days* – was held in Paris with around 30 participants on-site and a dozen participants connected on-line.

¹⁵ https://operas-eu.org/projects/translations-and-open-science/

¹⁶ https://tradso.hypotheses.org/

¹⁷ https://www.ouvrirlascience.fr/report-by-the-translations-and-open-science-working-group/

Focus on ► COESO: COllaborative Engagement on SOcial Issues project



In its final year, the COESO project (2021–2023), funded through the EU Horizon 2020 R&I Programme, continued to foster the growth of Citizen Science in the Social Sciences and Humanities. Citizen Science and participatory research methodologies bring society and academia together to co-produce relevant research. In its three years, COESO enabled 10 "Pilot" citizen science projects¹⁸ in the social sciences and humanities, each with a focus on a specific social issue and involving different SSH disciplines. In addition to providing the Pilots with funding, COESO facilitated Mutual Learning Exercises (MLEs)¹⁹ among Pilot members – for shar-

ing knowledge and practices with each other, especially in regards to research storytelling. Pilot members also provided input and feedback during the design and development process of the main COESO output: the VERA hub. 2023 saw the finalisation of several activities: in January, COESO launched the VERA hub²⁰, a public digital platform where researchers and society members can network, find and set up tools for project collaboration, and search for research funding. Presentations about the platform were made throughout the year, and by December, 49 researchers and 70 citizen sciences were registered (including private and public profiles). VERA's funding tool, in particular, was continuously enhanced throughout the year with the ongoing addition of relevant SSH citizen science funding opportunities, and COESO further engaged European funders²¹ in conversation about how best to support SSH citizen science. In another area of the project, COESO applied internal communication data from the Pilots to develop a "proof of concept" for a potential tool, "Cooperation Analytics"²². The tool utilises Natural Language Processing techniques to analyse written and spoken language for the purpose of assisting citizen science practitioners to self-assess how they cooperate with each other. Additionally, COESO interviewed the Pilot members about their work and featured a number of them in an engaging podcast series, "Exploring Citizen Science"23, and a multilingual article series, "Terrains Communs" (English: "Common Grounds"²⁴), on the Cafebabel online magazine - thus increasing the visibility and recognition of the SSH contribution to citizen science. Information about COESO's key results, including the 10 Pilots, were featured at its well-attended final conference, "Connect.Collaborate.Create."²⁵ in October 2023. All 33 of COESO's deliverables remain openly available on Zenodo (#COESO Project).

The project came to a close in December 2023, and OPERAS will continue to support society-academic research collaborations through its commitment to the ongoing management of the VERA hub. OPERAS is currently searching for funding opportunities and partners to continue supporting citizen science and participatory research within social sciences and humanities disciplines, as part of its "Services for Society".

- ¹⁸ https://coeso.hypotheses.org/pilots
- ¹⁹ https://doi.org/10.5281/zenodo.10046771
- ²⁰ https://vera.operas-eu.org
- ²¹ https://coeso.hypotheses.org/funding-advocacy
- ²² https://coeso.hypotheses.org/4551
- 23 https://podfollow.com/exploring-citizen-science
- ²⁴ https://cafebabel.com/en/article/tag/common-grounds/
- ²⁵ https://ccc.sciencesconf.org/





Services 9 services in production, 3 in various phases of evaluation and design

OPERAS offers a range of useful services that can greatly benefit researchers and authors in the SSH community. These services enable researchers to discover open scholarly resources, improve the quality of peer-review practices, engage in collaborative citizen science projects, and more.

OPERAS Service Catalogue

Discovery Services:

GoTriple Exploring Social Sciences and Humanities research in multiple languages

Or Pathfinder Finding editorial services for academic publishing

Quality Assurance Services:



Increasing transparency about peer review for monographs

Research for Society Services:

O Hypotheses Fostering research dialogues and impact through academic blogging

Activating participatory research in Citizen Science

Analytics Services:

vera

Metrics

Measuring usage and impact of Open Access content

The current service portfolio with some brief descriptions are provided below:

GoTriple: enables users to discover and reuse open scholarly resources in multiple languages. It also allows users to connect with other authors and researchers in the humanities and social sciences and provides innovative tools such as visualisation, analytics, web annotation, trust building and recommender systems.

Metrics: collects usage and impact metrics from various sources related to published Open Access books, which can be accessed, displayed and analysed from a single access point.

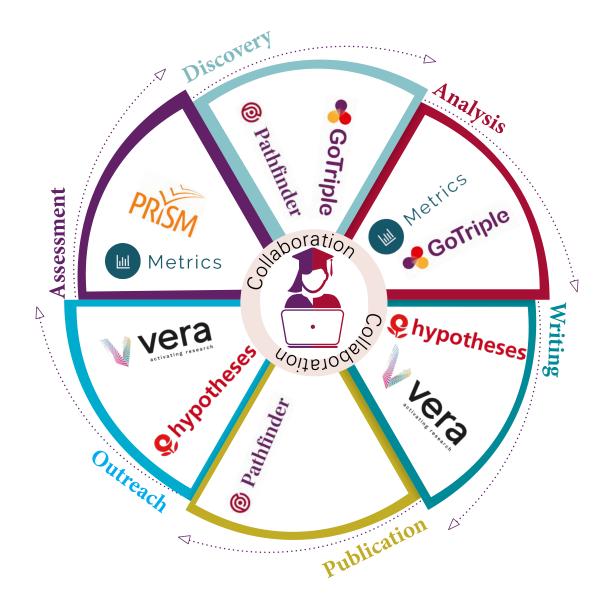
PRISM (Peer Review Information Service for Monograph): aims to improve transparency and trust in Open Access book publishing by providing standardised information about the peer-review process.

Hypotheses: a platform that provides a space for SSH research blogs, fostering innovative formats of scholarly communication and offering multilingual content.

VERA: a platform that allows SSH researchers to build citizen science projects together with diverse stakeholders and provides tools to facilitate the collaboration and the project's development.

Pathfinder: enhances the visibility of editorial services and connects editors and editorial managers with services and service providers.

Translation: Though this service is undergoing only a design study, it is included here as it is a dedicated task part of OPERAS-PLUS WP5. The platform aims to provide a collaborative environment for researchers and professionals to translate



OPERAS Services and Research Lifecycle

OPERAS Internal Services



OPERAS ID

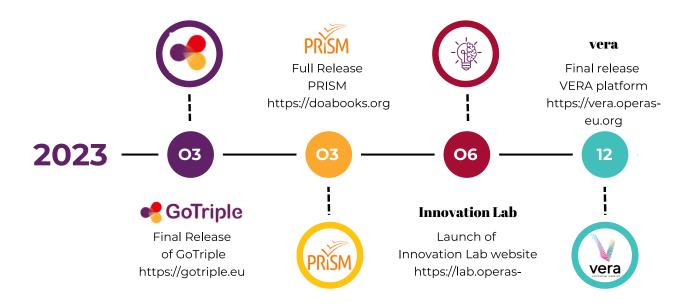


Internal services include:

- **FitSM®:** a training and certification program in lightweight service management mainly for OPERAS members.
- OPERAS ID: provides a single solution for user registration across all services, offering federated identity such as ORCID, Google, EGI Check-in.

Messaging: dedicated Mattermost server for collaborative messaging.FitSM® is a training and certification program in lightweight service management mainly available for OPERAS members.

OPERAS also offers a range of professional services to support the management and coordination of scholarly communication in the SSH. This includes consultancy services on topics such as FAIR data management, IT service management (ITSM), policy development and Open Science. OPERAS also provides communication and outreach services to help increase the visibility and impact of SSH research.



The last year was primarily centred around the technical development of services. We witnessed many services transition between different phases, and we successfully implemented a system to manage and monitor these transitions effectively. Additionally, we established a robust governance structure to ensure smooth operations of our services.

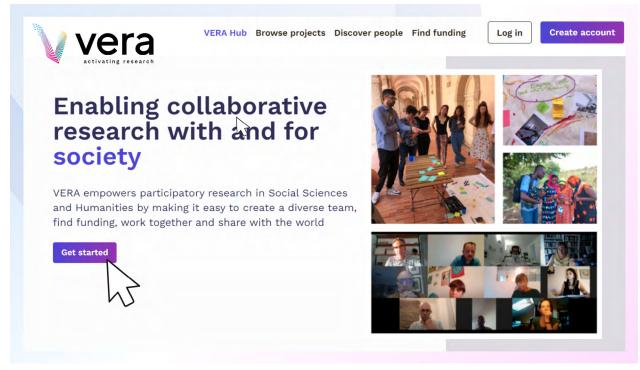
At the start of 2022, there were only 4 services in Beta, with 6 services either in the design phase or earlier. Therefore, it was a busy year from a development perspective. By the end of mid-2023 (the timing of writing), 9 services were in production, 0 in Beta and only 3 in Alpha or under design.

Currently, we have 6 services in the OPERAS service catalogue and 11 in OPERAS service portfolio.



The VERA hub²⁶ connects and supports SSH researchers and society members to co-create research together. It enables **collaborative research with and for society**, empowering participatory research in the social sciences and humanities by making it easy to create a diverse research team, find funding, work together and share project information with the community. VERA was developed together with citizen science practitioners through the COESO project (2021-2023) and released to the public in January 2023. It is updated regularly in response to community feedback. The VERA Hub tutorial²⁷ provides a quick overview of how to use all its features. In late 2023, representatives from the OPERAS national nodes were trained on how to use VERA and provided with resources for conducting VERA trainings and demonstrations in their respective countries.

- For professionals working on social issues and academic researchers
- ▶ Use matching tool to find research partners
- Browse useful collaboration tools
- Search for funding
- Post project updates



Page view: https://vera.operas-eu.org/

²⁶ https://vera.operas-eu.org/

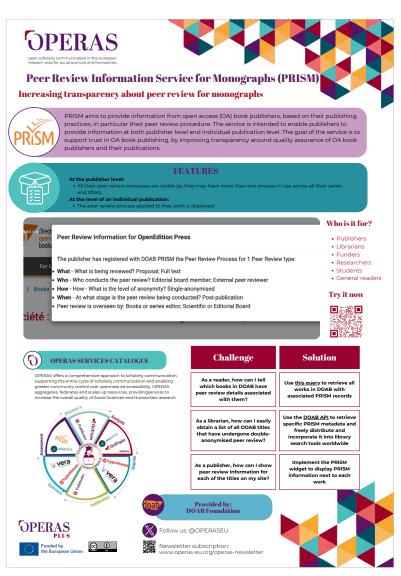
²⁷ https://www.youtube.com/watch?v=cBQGGOR3JJ8&t=110s



The Peer Review Information Service for Monographs, PRISM²⁸ for short, is a free quality insurance service for publishers, aimed at increasing trust in open access book publishing by improving transparency around peer review procedures. It is provided by the Directory of Open Access Books (DOAB) and has been part of the OP-ERAS service catalogue²⁹ since its launch in November 2022.

PRISM gives publishers the opportunity to display information about their peer review procedures across their entire catalogue in a standardised way, on both a publisher level and an individual title level. At the publisher level, all peer review processes are visible, as multiple processes may be used across series and titles. At the individual publication level, the specific peer review process applied to that title is applied.

In 2023 over 5,000 PRISM records were added to DOAB. The majority of these records can be attributed to KIT Scientific Publishing and Taylor & Francis, but there are now 13 publishers who participate in PRISM. A PRISM widget was developed for participating publishers to display on their website and can be deployed using information found in this documentation³⁰.



PRISM Poster Presentation

During Peer Review Week (25–29 September 2023), DOAB published a blog promoting PRISM and encouraging publishers to consider using the service. PRISM was also mentioned earlier in 2023 in the celebratory blog for the 10th anniversary of DOAB.

PRISM benefits all stakeholders in the scholarly communications ecosystem by giving librarians confidence in recommending Open Access publications to their patrons, allowing funders and users to see key details about quality control processes of Open Access books, and of course, providing publishers with the opportunity to showcase their best practices.

²⁸ https://www.doabooks.org/en/publishers/prism

²⁹ https://operas-eu.org/services/prism/

³⁰ https://github.com/trilobiet/prism-widget

OPERAS FAIR Activities

Adoption of FAIR principles to Social Sciences and Humanities research results

In 2023, the FAIR principles adoption was integrated with OPERAS training-related activities. In the context of the Skills4EOSC project, OPERAS prepared an extensive learning path for researchers that includes a FAIR principles' presentation. In terms of services, the FAIR principles were also addressed through the GoTriple platform: the end of the project was also the time to deliver the final version of the platform's Provider Handbook, which details the data management best practices improving the referencing on the GoTriple. More precisely related to the publishing activities, the FAIR principles were an essential part of the deliverable from the CRAFT-OA project which was delivered at the end of 2023: "Report on Standards for Best Publishing Practices and Basic Technical Requirements in the Light of FAIR Principles".³¹ The OPERAS team directly contributed to this deliverable. In addition, the OPERAS team continued its coordination work with ERICs in the SSH in order to connect the FAIR related activities in the widest range of SSH disciplines. OPERAS and the ERICs CESSDA, CLARIN and DARIAH met during the year to exchange information about their respective projects and collaborated in the shaping of the training for researchers achieved in the Skills4EOSC context. In a more global context and in collaboration with SSHOC members, OPERAS submitted to RDA (Research Data Alliance) the proposition of a WG dedicated to the alignment of multilingual vocabularies that represent in themselves a FAIR-enabling tool. The WG should become active in the course of 2024. Besides the continuing activities within Skills4EOSC, CRAFT-OA and RDA, the OPERAS team intends to increase the FAIR awareness and adoption in the OPERAS community thanks to the SIG Standards.



OPERAS engagement in Europe Empowering Social Sciences and Humanities research by collaboration

The European Commission has been supporting Open Science for many years, both at a political level with official documents and a financial level with infrastructure funding and the building of the EOSC. Most recently are the *Council Conclusions* on Research Assessment and Implementation of Open Science, which emphasises the role of Open Access publishing as a core component of Open Science.

OPERAS was identified in the *Conclusions* as one of the major organisations able to support the "European approach and capacities for academic publishing and scholarly communication". Open Science goal is a more sound and transparent science, which can be a game changer in the achievement of the UN Sustainable Development Goals. Hence, research should not only be responsive to societal needs but co-created in deep dialogue with society itself.

The *Conclusions of the Council on Research Assessment and Implementation of Open Science* clearly insist on the need to better support Open Access publishing and open scholarly communication from both a financial and a strategic perspective. To increase the impact of science, and especially its use and reuse by different stakeholders, open scholarly communication practices must be shared and improved in a coordinated manner. This coordination should be managed at the political level by the Member States, and also at the scientific level by increased collaborations between scientific organisations: defining priorities, gaps; supporting Open Access publishers^[1]; developing innovative practices of scholarly communication, increasing the visibility and access of the scientific outputs, etc. This list, coming from the *Council Conclusions*, shows how Open

Access is an asset in the Open Science policy and the need to have a Research Infrastructure dedicated to it.

³¹ Armengou, C., Edig, X. van ., Laakso, M., & Umerle, T. (2023). CRAFT-OA Deliverable 3.1 Report on Standards for Best Publishing Practices and Basic Technical Requirements in the Light of FAIR Principles (Draft). Zenodo. https://doi. org/10.5281/zenodo.8112662

THE COUNCIL OF THE EUROPEAN UNION [...] WELCOMES the setting up of [...] dedicated research infrastructures such as [...] OPERAS (Open scholarly communication in the European Research Area for social sciences and humanities);³²

Collaboration is also addressed in the context of the European policy on Research Infrastructures, especially "for the advancement of science, science diplomacy, tackling global challenges and increasing access to excellence" as written in the Council Conclusions on Research Infrastructures published in December 2022. In this perspective, it is particularly welcome to engage with Research Infrastructures that have close relations or that are part of the same scientific domain. The European Strategy Forum on Research Infrastructures (ESFRI) has developed a dedicated taxonomy for Research Infrastructures based on their specialties and socio-economics impacts. The Social and Cultural Innovation (SCI) domain, for instance, deals with Research Infrastructures that are related to Social Sciences and Humanities.

Collaboration

OPERAS RI has engaged into several collaborations on different levels with the SSH ESFRIs. Three different tools structure the general framework of collaborations between OPERAS and the SSH ESFRIs:

- Signature of MoUs: with the SSHOC community in May 2022 and with CESSDA in September 2022.
- Opening a seat at the General Assembly level through dedicated supporting membership with DARIAH.
- Being partners in different EU projects for the SSH community (OPERAS-P, TRIPLE, OPERAS-PLUS, SSHOC, Palomera). Most of these projects are initiated by OPERAS to call for collaboration with the existing ERICs from the Social and Cultural Innovation domain.
- Being part of the SSHOC governing board to address in an aligned way the SSH needs.

OPERAS added values

OPERAS Research Infrastructure is a member of the EOSC Association and as such it has joined the operational group made of the ESFRIs that are members of the Association.

- In collaboration with Science Europe, Coalition S and ANR, it published the Diamond Action Plan and will be the provider of the future capacity centre for Diamond Journals.
- OPERAS has been identified as one of the primary organisations able to support the "European approach" and capacities for academic publishing and scholarly communication" in the Council Conclusions on Research Assessment and Implementation of Open Science

OPERAS has signed the Coalition for Advancing Research Assessment (COARA) call on research assessment and supports the Coalition through some of its services. OPERAS actively participates joined in two working groups linked with its activities:

- Multilingualism and language biases in research assessment.
- Recognising and rewarding peer review

Find more details on the role of the OPERAS Research Infrastructure in the first policy brief of the OPERAS community.33

³² Council of the European Union, Research assessment and implementation of Open Science, Council conclusions (adpted on 10 Jun 2022), p. 9, https://www.consilium.europa.eu/media/56958/st10126-en22.pdf

³³ OPERAS Community: Supporting European capacities for Social Sciences and Humanities academic publishing and scholarly communicaion: The role of the OPERAS research infrastructure, Policy Brief, 2023, DOI: 10.5281/ zenodo.11505526 57



Measuring the progress: OPERAS Key Performance Indicators and Objectives





In 2023 a monitoring framework was developed for the OPERAS Research Infrastructure to oversee OP-ERAS activities, measure its long-term impact and give governing bodies and managers an overview to fine-tune the performance. It provides metrics and key performance indicators (KPIs) across various aspects of the OPERAS research infrastructure. The framework is developed to provide KPIs aligned with OPERAS' objectives and pillars and to demonstrate its influence on society, economy, innovation and policy.

The OPERAS Central Hub is responsible for organising self-assessment and consultation, monitoring KPIs and risks, providing guidance on quality management to National Nodes and Service Providers, and employing benchmarking and best practices to support the planning and development of quality management of OPERAS.

The performance of OPERAS ERIC shall be evaluated annually against a set of KPIs. The list of KPIs is expected to evolve according to needs and practicality. The KPIs are categorised into 5 types:

- Communication indicators
- Service indicators
- Community indicators
- Financial & socio-economic indicators
- Governance & management indicators

In addition to these, OPERAS has a set of KPIs for assessing the recognition, relevance and impact of OPERAS. As a starting point, a few of these indicators are introduced in the following sections. For 2023 we can present a choice of indicators. They can show OPERAS impact on strengthening and improving the European Research Area by 1. Facilitating Open Access in the ERA; 2. Enhancing collaboration and 3. Supporting innovation.

Governance & Management Indicators

Indicator	2023
Percentage of performed actions defined in the Strategic Implementation Plan in total until 2025	31.3%
Number of Actions performed	52 of 166

Communication Indicators

Indicator	2023	Increase in comparism with 2022 in %	
Publications on Zenodo	133	148%	
Visitors on website operas-eu.org	27,811	47%	
Blog Posts https://operas.hypotheses.org	23	-4%	
Social Media (Twitter/X, LinkedIN, Facebook, Instagra	am together)		
Follower:	4,533	30%	
Posts:	587	52%	

Events (including main projects events and national nodes events)			
People reached and engaged in outreach activities	6000	-	
Days of engagement events (not including internal communities)	17,6 (142 hours)	-	
Numbers of events (without trainings)	126	80%	

Services Indicators

OPERAS has 6 services in the OPERAS service catalogue and 11 in OPERAS service portfolio. (Status April 2024)

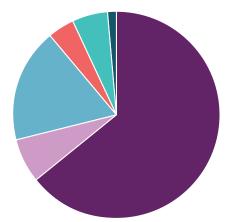
- ▶ **GoTriple**, a discovery platform for Social Sciences and Humanities in multiple languages, provides access to over **15 million documents from more than 1,300 data sources**.
- Hypotheses, a dedicated service within the portfolio fostering research dialogues and impact through academic blogging, draws approximately 1,1 million visits per month, hosts around 5,000 active blogs, and engages over 20,000 active accounts.
- VERA, activating participatory research in Citizen Science, supports around 100 projects.
- **PRISM**, a tool for increasing transparency about peer review processes for monographs, hosts approximately **6,000 titles** and connects **18 publishers**.
- Pathfinder, a service aimed at finding editorial services for academic publishing, collaborates with 4 service providers to offer 27 options.
- Metrics, a service measuring usage and impact of Open Access content, engages with 49 publishers and about 3,300 books tracked, complemented by the installation of around 40 widgets to enhance user interaction and accessibility.
- Significant progress includes the operationalisation of the OPERAS ID, which simplifies user access across all OPERAS services and currently integrates Google, ORCID and EGI Check-in, others in the development pipeline, and the FitSM training that enhances service management capabilities within the community.

These developments underscore OPERAS' commitment to fostering an integrated and efficient research infrastructure.

Indicator	2023	
Service Providers		
Members in the Services and Technologies Board	8	
In-kind contribution of service providers public, yearly	€327,000	
In-kind contribution of service providers private, yearly	€128,00	
OPERAS members are trained and knowledgeable in SSH open science service delivery		
Number of training events (FITSM training)	3	
Number of training participants	37	
From (number of countries)	11	

Community Indicators

Indicator	2023
Ordinary members	47
New ordinary members in 2023	5
	University of Lorraine, University of Rennes, Library University of Cyprus, CISC, Thoth
Core members	13
New core members in 2023	3
	FECYT, Spain; Federation of Finnish Learned Soci- eties: Finland; erih+, Norway
Supporting members	4
New supporting members in 2023	١
	University of Nanterre, France
All members	64
All member countries	23



- Ordinary members
 - New in 2023
 - **Core members**
 - **New in 2023**
- Supporting members
- **New in 2023**

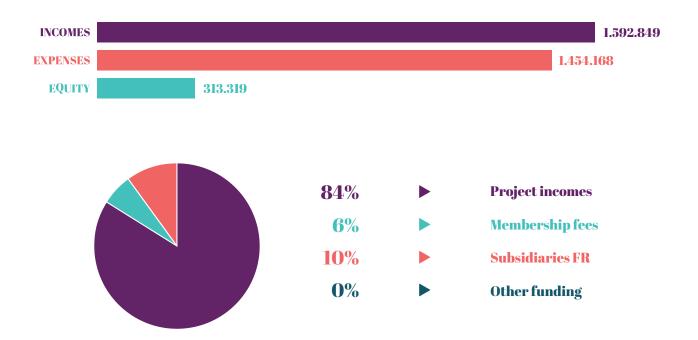


Financial Overview and Indicators

In 2023 the OPERAS budget has been growing enourmous thanks to more projects participation of the OPERAS AISBL. The financial statement is presented as of 31 December 2023. The end-of-year accounts show a positive result amounting to 174,638 \in , which accumulated to the previous end-of-year totals 313,319 \in .

Table of OPERAS Financial statement 2023

Income and Expenses	2023 (€)
Projects incomes	1.335.662
Membership fees	95.000
Subsidiaries France (ministry and CNRS)	157.665
Other funding	4.522
Total Incomes	1.592.849
Sub total employee costs	-862.236
Sub total office costs	-123.058
Sub total financial and professional costs	-87.217
Sub total project costs	-381.657
Total Expenses	-1.454.168
Projected end of year result	138.681
Profit end-of-year 2022	174.638
Brought forward end-of-year 2021	313.319
Cumulative profit (equity)	313.319







OPERAS AISBL project resource used in 2023 and funding claimable

Projects resource (person months PM)	Used PM in 2023	Total for funding (€)
CRAFT-OA	6,3	67.280
DIAMAS	12,1	77.814
GraspOS	6,0	70.109
OPERAS-PLUS	21,1	309.434
PALOMERA	11,3	130.353
Skills4EOSC	9,0	47.915
TRIPLE	1,7	62.562
OAeBU Data Trust	7,4	73.162
FNSO Traduction/Open Science and Translation	13,5	101.651
Total project resource 2023	88,4	940.279

Number of Members of OPERAS participating in projects in 2023 (linear projection of the total funding/total project months)

The table below shows the participation of OPERAS' members in the EU funded projects and how the community-building is supported by the EU funding.

Project	OPERAS Members	Total Project Partners	Number of Members	SUM of Funding 2023* (€)
CRAFT-OA	Core members	23	7	310.854
	OPERAS AISBL	23	1	67.280
	Ordinary members	23	5	161.438
	Supporting members	23	1	245.375
CRAFT-OA Total			14	784.947
DIAMAS	Core members	22	6	230.512
	OPERAS AISBL	22	1	77.814
	Ordinary members	22	5	226.258
	Supporting members	22	1	11.458
DIAMAS Total			13	546.043
FNSO-MESR	OPERAS AISBL	1	1	101.651
FNSO-MESR Total			1	101.651
GraspOS	Core members	18	1	41.875
	OPERAS AISBL	18	1	70.109
	Ordinary members	18	1	108.333
GraspOS Total			3	220.317
OAeBU DT	OPERAS AISBL	3	1	73.162
OAeBU DT Total			٦	73.162
OPERAS-PLUS	Core members	14	9	462.965
	OPERAS AISBL	14	1	309.434
	Ordinary members	14	3	70.252
	Supporting members	14	ſ	15.500
OPERAS-PLUS Total			14	858.151

PALOMERA	Core members	16	5	349.375
	OPERAS AISBL	16	1	130.353
	Ordinary members	16	3	56.625
	Supporting members	16	2	157.063
PALOMERA Total			11	693.416
Skills4EOSC	Core members	43	2	79.469
	OPERAS AISBL	43	1	47.915
	Ordinary members	43	3	127.570
Skills4EOSC Total			6	254.954
TRIPLE	Core members	22	7	127.775
	OPERAS AISBL	22	1	62.562
	Ordinary members	22	3	90.122
	Supporting members	22	1	13.953
TRIPLE Total			12	294.412
Grand Total			75	3,827,052

* linear projection of the budget planned in 2023

OPERAS Impact on Open Science Policy

Policy Briefs in 2023: 3

USE CASE: How recommendations are used?

The Funder Forum was established as part of the PALOMERA project in 2023 and led by the scientific coordinating project partner OAPEN. It facilitates the exchange of practices and experiences between research funders about policies designed to promote Open Access of academic books, and – where possible – align such policies and practices. It also explores ways to deal with challenges and obstacles identified by the participants collaboratively. In 2023 there were 2 Funder Forum meetings online, with around 40 participants from different countries. Palomera's 1st Policy Brief goes into more detail about the need for this discussion forum and future plans.

USE CASE: Boards and task forces of which OPERAS is a member

OPERAS is a member of the European Open Science Cloud (EOSC) and OPERAS Co-Coordinator Suzanne Dumouchel is part of the EOSC Board of Directors.

OPERAS is involved in the Governing Board SSH Open Cluster (SSHOC), a thematic cluster of EOSC, which not only enables synergies with research infrastructures within the cluster, but also offers a platform for dialogue with the infrastructures from other domains. OPERAS participates in the day-to-day work of SSHOC and contributes to the joint position paper on SSH infrastructures, developing collaborations and partnerships. OPERAS also participates in the EURISE network, which provides an opportunity for the technical leads in the SSH RIs to meet and discuss standards, best practices, education, software engineering and general networking and knowledge exchange. All OPERAS services reaching beta phase are published in the SSHOC and EOSC marketplaces.

OPERAS AISBL is a signatory and a member of the Coalition for Advancing Research Assessment (CoARA), which has the aim of a joint effort to improve research assessment practices. In order for CoARA to act on the principles of the agreement, they decided to form working groups and national chapters to create guidelines and nudge organisations and institutions towards a research assessment reform. As a result,

OPERAS actively participates joined in two working groups linked with its activities:

- Multilingualism and language biases in research assessment
- Recognising and rewarding peer review

OPERAS impact on strengthening and improving the European Research Area

USE CASE: Highlighting collaborations in a long-term perspective:

OPERAS engages with other RIs in the field of Social Sciences and Humanities, particularly DARIAH, through bilateral and multilateral collaborations on identified topics, particularly the integration of OPERAS services into SSHOC catalogue of services. The development of OPERAS portfolio of services will rely on collaboration with EU e-infrastructures such as OpenAIRE and EGI (Memorandum of Understanding continuation confirmed in June 2023) to provide access to hosting and computing facilities and to collaborate on the integration of the portfolio of services into the EOSC. This contributes to a coordinated Research Infrastructure capacity among countries, regions and across different scientific disciplines, also by exploiting possibilities given by the smart specialisation processes.

Thanks to the Memorandum of Understanding signed between GoTriple and OpenAIRE in 2022, the collaboration between the two entities continues and provides an important amount of resources from the Social Sciences and Humanities field to the GoTriple platform. The set-up of a community gateway for GoTriple on the OpenAIRE servers helps to select appropriate resources from the Research Graph. The selected resources are then made available to the GoTriple as a JSON dump. The dump is regularly updated and the overall amount of resources collected from OpenAIRE collections and currently present on GoTriple is around 250.000.



Publications and reports of the OPERAS community



Appendix: Publications and reports from the OPERAS community

Focus on Key Publications

Report on Standards for Best Publishing Practices and Basic Technical Requirements in the Light of FAIR Principles (CRAFT-OA Deliverable 3.1)

This document presents an overview of the challenges and initiatives surrounding Diamond Open Access (OA) Journals, which are critical for promoting open scholarly communication. Despite their potential, Diamond OA Journals, accounting for 8–9% of global scientific articles and 45% of OA publishing, face significant hurdles in technical capacity, management, visibility, and sustainability. The "Open Access Diamond Journals Study" (OADJS) and the subsequent "Action Plan for Diamond Open Access" (APDOA) highlight these challenges and call for community action to support these journals. Projects like DIAMAS and CRAFT-OA are responses to this call, focusing on developing standards, best practices, and technological support for Diamond OA Journals. This deliverable, related to CRAFT-OA's Work Package 3, Task 3.1, offers a comprehensive review of technical standards and publishing best practices aimed at enhancing the journals' compliance, visibility, and sustainability. It emphasises the difficulty Diamond OA Journals face in adhering to diverse and complex standards due to limited resources and collaborative workflows. By focusing on key policy documents and standards, such as Plan S, EQSIP, the DOAJ Seal, and the OpenAIRE Guidelines, the report aims to improve interoperability and support the integration of Diamond OA Journals into the European Open Science Cloud (EOSC). It showcases examples of best practices and concludes with the importance of interoperability in making research outputs more discoverable, reusable, and reproducible, marking a significant step towards a more open and accessible scholarly communication environment.

https://doi.org/10.5281/zenodo.8112662

+3,000 views and 600 downloads

Collaborative Models for OA Book Publishers

The OPERAS Open Access Business Models Special Interest Group's white paper, based on a 2021 survey, explores the evolving Open Access (OA) publishing landscape for monographs in the Social Sciences and Humanities. Despite the limited sample size, the report identifies crucial insights into collaboration, funding, and support. It highlights a general hesitancy among publishers to engage in collaborative models due to a lack of knowledge or perceived necessity, pointing to an early stage in the adoption of shared infrastructures for OA books. While publishers consider their operations somewhat sustainable, mainly through institutional support, there's a clear need for diversified funding sources and enhanced resources. The paper suggests that increasing awareness and providing targeted support and training could encourage more extensive collaboration, offering actionable insights for projects like DIAMAS, OPERAS-PLUS, and Palomera to further research and develop the OA publishing sector.

https://doi.org/10.5281/zenodo.7780754

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Towards an enhanced and aligned institutional publishing landscape in the ERA_approved by the EC (DIAMAS Deliverable 1.3)

This preliminary policy document calls for increased alignment in institutional publishing along several dimensions: (1) geographical (i.e. national, regional, and global), (2) disciplines and epistemic traditions, and (3) types of stakeholders (institutions, publishers, service providers, scholarly societies, journal editors), to benefit the work of researchers and thus enable science to progress faster.

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Extensible Quality Standard in Institutional Publishing (EQSIP) (DIAMAS Deliverable 1.3)

The Extensible Quality Standard for Institutional Publishing (EQSIP) aims to enhance the quality and transparency of governance, processes, and workflows in institutional publishing, aligning with the core components of scholarly publishing identified in the Diamond Open Access (OA) Action Plan and refined by the DIAMAS project. EQSIP V1.0, the initial version, is an aspirational benchmark derived from a comprehensive analysis of existing standards and best practices relevant to institutional publishers. It serves as an ideal quality level for Diamond OA institutional publishers to strive towards, rather than a mandatory standard. The ongoing DIAMAS project will further refine EQSIP through testing with selected publishers, leading to the development of EQSIP V2.0. This next version aims to tailor the standards to specific scholarly disciplines, regions, and languages, with full implementation anticipated once the necessary support infrastructure for Diamond OA publishers is established.

https://doi.org/10.5281/zenodo.7923916

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DOI 10.5281/zenodo.7928459



OPERAS PLUS



This project has received funding under the Horizon Europe research and innovation programme under Grant Agreement No 101079608. OPERAS received funding under the Horizon Europe and Horizon 2020 programmes and its members. www.operas-eu.org/funding-information.

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