

ON THE ROAD TO SUSTAINABILITY: PAVING THE WAY FOR
OPERAS AS AN EFFICIENT OPEN SOCIAL SCIENCES AND HUMANITIES
SCHOLARLY COMMUNICATION RESEARCH INFRASTRUCTURE

Mapping opportunities, needs and challenges:

OPERAS AND THE POTENTIAL NATIONAL NODES

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ON THE ROAD TO SUSTAINABILITY: PAVING THE WAY FOR OPERAS AS AN EFFICIENT OPEN SOCIAL SCIENCES AND HUMANITIES SCHOLARLY COMMUNICATION RESEARCH INFRASTRUCTURE

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Abstract

Based on the first 18 months of the OPERAS-PLUS project, this deliverable is a natural development of the discussions that take place inside the consortium on how to develop OPERAS national nodes and what are the main challenges faced in this regard. After delivering the Roadmap for the implementation of OPERAS national nodes in month 12, this deliverable has the objective of diving deeper into the current state of OPERAS 13 (and counting) national nodes, which are at different levels of development.

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1. Introduction

The deliverable 7.1, “Mapping opportunities, needs and challenges: OPERAS and the potential national nodes” is a reflective and collective work undergone by the members of Work Package 7 of the OPERAS-PLUS project. This deliverable is due in month 18 of the project (February 2024), meaning that it will be ready exactly six months after the delivery of D7.2, “Roadmap for the implementation of OPERAS national nodes”. Considering the small amount of time between these two points, and the basis for the building of the national nodes that was provided in D7.2, the scope of this document is to go deeper into some issues, questions, reflections, challenges and possibilities for improvement that were brought to, in order to take concrete steps towards implementing the OPERAS national nodes - a process that will be completed in the second part of the OPERAS-PLUS project.

In this document, we present a background of the work undergone by all current OPERAS national nodes, a review that gives an overview of the commonalities and differences between the work of the diverse nodes. Then, we explore the challenges and opportunities presented by this aggregate of activities, to find a common ground in which it is possible to establish common requirements for all, including issues regarding the building of the national nodes, sustainability and the positioning of OPERAS national nodes both nationally and at the European level.

2. Background – The Need for OPERAS National Nodes

A national node is a key element in connecting OPERAS infrastructure services with the varying needs and realities of the communities at the national level. National nodes are expected to tackle challenges and find solutions to different types of activities, as listed in OPERAS-PLUS D7.2¹. In the previous deliverable, three main steps were specified for OPERAS national nodes:

a) Identification of needs, stakeholders and members:

This point deals with the identification of specific needs at different levels (both local and regional), provision of support and training to the communities, besides the

¹ OPERAS-PLUS Deliverable 7.2: available at <https://doi.org/10.5281/zenodo.8289238>.



identification of national services, infrastructures, national resources and the collection of needs of the scientific communities inside each country.

b) Targeting of the needs

This second topic addresses the mapping and the promotion of the involvement of the national stakeholders, the definition of targeted solutions according to each region's needs, the testing of pilots of organisation models, the provision of support and access to OPERAS on a low threshold, and the presentation of the OPERAS' services in each national landscape.

c) Outreach and intermediation

Finally, the third overarching topic deals with actions such as, but not limited to, boosting the outreach within each country, facilitating interaction with the nodes of other existing infrastructures and promoting their articulation, and acting as the intermediary between the European and the national research landscapes.

Thus, the role of OPERAS' national nodes involves multi-focal relations with the promotion of values such as multilingualism and the bibliodiversity of scholarly communication, as well as transferring objectives and services from the European to the national levels. Also, OPERAS' national nodes are a means of local implementation of the infrastructure services and for the identification of potential new members, enhancing awareness in each country. Finally, the nodes enhance the links between other European research infrastructures and members of national scientific landscapes inside the Social Sciences and Humanities.

3. State of the Art: OPERAS Nodes Landscape

This section brings together the current and past activities carried out via all national nodes until now (February 2024, M18 of the OPERAS-PLUS project). The purpose of this cross-cutting overview is to identify common strengths, challenges and potentials for the development and maturation of all the nodes.

OPERAS-FR

The French national node is OpenEdition, the national infrastructure for open scholarly communication in Social Sciences and Humanities (SSH), involving its four overarching institutions in OPERAS, and in particular, CNRS, EHESS and Aix-Marseille University, representing a community of more than 600 journals on its platform OpenEdition journals, 130 publishers on OpenEdition books and a community of more than 3000 researchers contributing to Hypotheses, the scientific blogging platform.

OpenEdition is represented at the level of the Executive Assembly by its main overarching institution, i.e. CNRS/INSHS. OpenEdition gives four full-time positions (two from EHESS, two from Aix-Marseille University), including a senior position, to the OCT², making it the leading organisation coordinating OPERAS as a whole. Therefore, the interactions between the central hub and the French national node can be considered as systemic and fully integrated. The highlights of this integration are:

- OpenEdition provides one of the services to the OPERAS portfolio: Hypotheses.
- OpenEdition co-owns with OAPEN another service provided by the DOAB to the OPERAS portfolio: PRISM³.
- OpenEdition leads the OPERAS Strategic plan objective 2: “The Diamond model supported as a major one in the scholarly communication ecosystem” and coordinates or contributes substantially to the diamond projects through Aix-Marseille University:
 - DIAMAS (coordinator)
 - CRAFT-OA (WP leader).
- OpenEdition leads the design of the training strategy of OPERAS through the Community Manager and supports the production of training in Open Science practice, FAIR principles adoption, scholarly communication services use and user engagement for both the Social Science and Humanities community and

² OCT: OPERAS Coordination Team.

³ See more about PRISM: <https://operas-eu.org/services/prism/>.



the scholarly communication community with a focus on Diamond model. The training strategy is related to OPERAS Strategic Plan Objective 5: “OPERAS members and communities are trained and knowledgeable in SSH FAIR and Open Science practices”.

- OpenEdition leads the FAIR principles adoption in the OCT through the FAIR data officer and supports the adoption of FAIR principles and Open Science practices by the French SSH community in coordination with OPERAS Strategic Plan Objective 5 and participates in the related project:
 - Skills4EOSC (in coordination with the Open Science coordinator of Aix-Marseille University).
- OpenEdition leads the citizen science topic in the OCT through the Citizen Science Officer, and supports the adoption of citizen science in SSH at the national level in coordination with OPERAS Strategic Plan Objective 5 through the involvement of EHESS, in particular in the COESO project.
- OpenEdition leads an inter-infrastructure project, COMMONS, that aims at integrating data and publication in the context of Open Science, with Huma-Num, the French national node for Darjah, hence providing coordination between both infrastructures at the national level.
- Finally, OpenEdition serves as the main contact point for OPERAS to disseminate information towards the French community through its mailing lists (47 200 subscribers), its social media accounts (15 500 Twitter followers) and its library membership program (226 libraries).

Other French institutions are members of OPERAS: Université Paris 10 Nanterre is a supporting member, and Progedo, RFIEA (Réseau Français des Instituts d'Études Avancées), Université de Lorraine, Presses Universitaire de Rennes are ordinary members. However, they are not yet integrated into the national node and have developed privileged and separate relations with the central hub. The recruitment of a new community manager at OpenEdition dedicated to the French national node should enable a better structuration of the French national node in the coming months.

As France is driving the journey of OPERAS within the ESFRI roadmap towards becoming an ERIC, there is a constant effort of coordination between the French Ministry of Research, the French core member CNRS and OpenEdition to align strategies during this period.

OPERAS-GER

As the national representative for OPERAS in Germany, the Max Weber Stiftung (MWS) started to build a national node in October 2020. The Federal Ministry of Education and Research (BMBF) has supported this initiative for a three-year timespan, funding one FTE project officer, 0.5 FTE assistant and respective tasks.

The work programme, which has been outlined in the application for funding, was mainly about raising awareness for OPERAS services and reaching out to possible users. A variety of formats has been tested and established. Among those, there were

- presentations at external conferences to showcase OPERAS and its services;
- workshops on behalf of OPERAS-GER;
- implementation workshops especially dedicated to performing a hands-on approach to services;
- OPERAS Open Chats, an online format to feature specific related topics;
- Twitter channel, blog on Hypotheses and infomaterial.

These activities are based on 3 aims:

- 1st: Increasing awareness - to raise awareness of OPERAS within the German scientific landscape;
- 2nd: Networking - to connect with institutions, libraries, data centres etc. via events, personal contacts;
- 3rd: Collection of needs - to present services and find users, and understand the needs of the German (potential) partners.

Especially the latter featured, every now and again, representatives from OPERAS in order to connect them with a German audience and bring together stakeholders from different countries. The OPERAS Open Chats have been introduced as the most successful format to attract a solid audience and to establish OPERAS-GER and OPERAS itself as a brand in the German landscape.

All these activities mentioned above have targeted librarians and people from other infrastructures in general. Scholars were present too, but only to a minor degree. It still remains a demanding task to get a scholarly audience involved.

The general networking included other infrastructures and neighbouring initiatives as well. Here, OPERAS joined forces with the initiative ENABLE, the open-access.network and the project AUROA, in particular.



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A particular effort has been undertaken to align OPERAS with other German infrastructures. The most important step was to enter the newly established society Geistes- und kulturwissenschaftliche Forschungsinfrastrukturen e.V. (GKFI, Research Infrastructures for Humanities and Cultural Studies) which connects OPERAS and DARIAH-DE and CLARIN-D, the German branches of the respective SSH ERICs.

Besides this, OPERAS-GER activities are also aligned with at least one consortium of the National Research Data Infrastructures (NFDI), which are currently put into practice in Germany. A collaboration with the Fachinformationsdienste (specialised information services), which constitutes the main stakeholder group for the research community in each subject within the SSH, is underway. Here again, OPERAS-GER aims to contribute to these national infrastructures, thus trying to root OPERAS deeper in the German research landscape.

During all this time, OPERAS-GER has been keen to report all its activities to the OPERAS EA and/or the OPERAS OCT to make sure the lessons learned from these experiences can be taken up by the ongoing OPERAS development itself, as well as to be customised to fit other OPERAS national nodes.

The funding period ended in September 2023. Thus in the beginning of 2023, MWS has started to pursue new funding opportunities for further supporting the German national node.

Since October 2023 OPERAS-GER has been operating without funding. Still, the German national node is continuing its activities, especially focussing on the NFDI consortia and the GKFI (Research Infrastructures for Humanities and Cultural Studies, see above), where it is contributing and co-managing the combined catalogue of services of DARIAH-DE, CLARIN-D and OPERAS.

OPERAS-GR

The Greek National Node is in its early stages of development, and it is coordinated by the National Documentation Centre of Greece (EKT). There is no funding available for the coordinator's role, and it is supported in kind by EKT. A number of national events have been organised to raise awareness regarding OPERAS.

On May 26th, 2021, the first Greek national node event took place. It was a full-day, online event that brought together Greek scholars, publishers, librarians and members of the OPERAS-RI. The landscape of Open Science in Greece was discussed while

colleagues from Germany and France shared their own experiences in building open science communities in their countries. More importantly, the Greek audience listened to what OPERAS is and how its services can facilitate the transition to Open Science in SSH. In the context of the TRIPLE project, a number of training webinars that attracted the interest of the Greek SSH community were organised by EKT. In these webinars, current challenges in Open Science were discussed, as well as the ways OPERAS can help the SSH community go beyond them. A dedicated event to the presentation of the GoTriple platform, the discovery service of OPERAS, to the Greek community was arranged for January 24th, 2023, so that the Greek audience would become familiar with one of the most important services of OPERAS.

EKT is currently seeking Greek partners to strengthen OPERAS' position in the country, while at the same time there are preliminary discussions with the government to explore funding opportunities for the national node.

OPERAS-HR

The Croatian National node is in its early stages of development, overseen by the Department of Information Sciences, University of Zadar, OPERAS EA member representing Croatia.

As part of the preparatory efforts, a series of online lectures have been organised in 2021, tailored for the Croatian research community, focusing on relevant themes of scholarly communication and open science. This series, titled "*Quarter to Noon: Tuesdays about Open Science*" (in Croatian: "*Podne manje kvarat: utorkom o otvorenoj znanosti*"), is accessible on the Department's YouTube channel, with plans for future events.

The involvement of the University of Zadar in multiple projects such as OPERAS-P, TRIPLE, OPERAS-PLUS, DIAMAS, and CRAFT-OA, apart from active contribution, aids in promoting OPERAS values within the national community and serves to educate and encourage utilisation of existing infrastructures, initiatives, and projects within Croatia's academic domain. Following those footsteps, OPERAS-HR is expected to play a pivotal role in influencing and contributing to the collaborative development of relevant infrastructures for scholarly communication and open science, fostering direct connections with the pan-European community and providing knowledge-sharing and support to the scholarly community in social sciences and humanities on crucial open science communication matters.



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On June 16, 2023, OPERAS-HR marked a significant milestone with its inaugural event, OPERAS-HR Day. This one-day event was dedicated to presenting OPERAS activities and outlining the role of the national node to the Croatian community of researchers, existing infrastructures, and RPOs. Additionally, OPERAS was introduced to the Croatian community, and insights were gained into establishing a national node by inviting OPERAS-GER as a guest to share their experiences. Notably, the University of Zadar is also leading the coordination of OPERAS SIG Best Practices.

For over a decade, commitment to Open Science has been evident through active participation in the international scientific conference PUBMET⁴. Through this platform, there has been tireless promotion and advancement of open scholarly communication, accelerating knowledge dissemination in related fields within Croatia and globally. Furthermore, the University of Zadar actively supports institutional OA publishing through dedicated platforms based on OJS and OMP systems - MorePress⁵ publishing platform, where diamond OA journals and OA books are published.

Despite the lack of dedicated funding for the establishment and current activities of the National node, efforts have garnered recognition among relevant infrastructures in Croatia. Strong connections and collaborations with research infrastructures like DARIAH-HR, CROSSDA, and CLARIN-HR have been forged, with active participation in events and conferences organised by other communities and initiatives aligned with Open Science principles. Looking ahead, for the academic year 2023/2024, the Department of Information Sciences has introduced a new elective course for students titled "Open Science," which comprehensively covers relevant topics encompassing the principles of open science. OPERAS-HR is also gearing up to organise events aimed at promoting OPERAS services to librarians, researchers, and other stakeholders.

OPERAS-IT

The Italian national node of OPERAS informally started in 2017 as part of the "Open Edition Italia" project, when the first "UNconference" on Open scholarly publishing was organised in Rome⁶. The event gathered around 50 participants and triggered the discussion among the first bunch of interested players (researchers, institutions, publishers).

⁴ For more information: <https://pubmet2023.unizd.hr/>.

⁵ More information on MorePress: https://morepress.unizd.hr/index_en.php.

⁶ More information about the event is available here: <https://openeditionitalia.it/1034>.

On May 13, 2021, the Italian community organised an online workshop to present OPERAS, its services and its value as an “enabler” for the research community. The workshop was attended by 33 participants who recognised the value of OPERAS-IT not only as a distributed infrastructure providing services but also as a free space to discuss topics like research assessment in the Humanities, inter- and cross-disciplinarity, and innovations in publishing. OPERAS-IT was identified as a potential player in seeking and creating synergies between different stakeholders (the Ministry, the funders, the publishers, and the research community) in order to make Open Science a reality. The presentations, the recordings and the report are available on Zenodo⁷. A mailing list was created to share information among the interested people.

In September 2021, the Ministry of University and Research recognised the value of OPERAS and included OPERAS in the “Piano Nazionale Infrastrutture di ricerca 2021-2027”, which is the National roadmap for relevant national infrastructures⁸. The inclusion in the Roadmap ensures annual funding for the national nodes.

In Italy, Research Infrastructures are usually led by the CNR (National Research Council) through one of its Research Institutes. CNR - ILIESI (Istituto per il Lessico Intellettuale Europeo e la Storia delle Idee⁹) was appointed as OPERAS-IT coordinator, due to its longstanding support of OPERAS and Open Edition Italia.

In 2022 CNR-ILIESI started drafting the Joint Research Unit (JRU) Memorandum of Understanding, which is the document that allowed to start formalising the Italian node as a research cooperation.

The JRU is aimed at

- the coordination and liaison with the central OPERAS hub;
- organising training, dissemination and outreach on open scholarly communication in the Humanities and Social Sciences;
- supporting the Ministry and Research performing organisations in the realm of open scholarly communication initiatives;
- help create synergies and collaboration at the national level to boost Open Science practices;
- pooling expertise, competencies and skills of the partners to improve OPERAS services;

⁷ Available at: <https://zenodo.org/doi/10.5281/zenodo.4761082>.

⁸ Available at:

<https://www.mur.gov.it/it/news/mercoledi-20102021/pubblicato-il-piano-nazionale-infrastrutture-di-ricerca-2021-2027>

⁹ See: <https://www.iliesi.cnr.it/>.



- listen to the community needs and suggest the creation of new services or the development of existing ones;
- seek for funding opportunities to enlarge the OPERAS portfolio of services or to sustain existing services.

The OPERAS-IT JRU was signed by June 2023 by 10 partners, namely the CNR-ILIESI (coordinator); the Universities of Torino, Bologna, Macerata, Messina, Milano Statale, Roma Tor Vergata; Firenze University Press and Lexis compagnia editoriale (publishers); and Net7, a digital service provider.

The OPERAS-IT JRU foresees a General Assembly, an Assembly of the associates and a management committee.

The first informal contacts were made in September 2023 to tackle some organisational and communication issues. The JRU is expected to start working effectively by early 2024.

In 2022, the OPERAS-IT soon-to-be node applied – together with the Humanities and Cultural Heritage research infrastructure national nodes DARIAH IT, CLARIN IT, E-RIHS-IT – for a NextGenerationEU/National Recovery and Resilience Plan funded tender. The consortium was awarded a 42.6 M€ grant for developing the H2IOSC – Humanities and Heritage Italian Open Science Cloud¹⁰.

H2IOSC aims at creating a federated and inclusive cluster of RIs in the ESFRI domain of Social and Cultural Innovation to allow researchers from various disciplines in the Humanities, Language technologies and Cultural Heritage sectors to collaborate in data and compute-intensive research. H2IOSC will support the implementation of a coherent strategy for RIs development and integration in Italy, optimising the use of the most relevant assets, upgrading and implementing the facilities as a result of needs arising from the reference communities, gathered from a comprehensive assessment and prioritisation work.

H2IOSC will

- address the needs of most disciplines in the Social and Cultural Innovation (SCI) spectrum and beyond;
- promote accessibility and the FAIR approach, via the creation of a one-stop, easy-entry place where users will find software, tools, datasets, services and pilot projects supporting specific needs of domain and cross-domain research;

¹⁰ H2IOSC information available at: <https://www.h2iosc.cnr.it/>.

- promote a data-centric approach, where resources are available in an integrated environment accessible through a set of virtual and remote access methods;
- foster training and engagement activities to build FAIR and Open Science skills, boost the visibility of RIs at the national and international levels, create new profiles (e.g.: data stewards, data curators) supporting data-driven research and the digital transformation in the Cultural and Creative Sectors and Industries (CCSIs).

OPERAS-IT will be in charge of developing the H2IOSC Marketplace, together with a group of services oriented to the production, management, and publication of sets of open scientific resources (digital scholarly editions, grey literature, FAIR data resources, scientific instructional texts and materials).

OPERAS-NL

As the OPERAS EA member representing the Netherlands, OAPEN is the national node for OPERAS in the Netherlands. Currently, no direct funding supports this role, which is therefore based on in-kind support provided by OAPEN.

On 22nd June 2021, the first national node event in the Netherlands (OPERAS-NL) was arranged. This online event marked the start of OPERAS-NL and brought together actors from the Dutch open scholarly community in the social sciences and humanities (SSH) to discuss how OPERAS can help advance the transition to open science in the SSH.

With about 25 participants, the group discussed the OPERAS Research Infrastructure, why OPERAS is important to the SSH community in the Netherlands, learned about experiences with OPERAS in France, and reflected on its relations to the Netherlands.

Furthermore, this event served to gather input around three main questions helping further shape OPERAS and its engagement in the Netherlands:

1. How can OPERAS add value to the Dutch SSH landscape?
2. Who should OPERAS partner up with?
3. What would you like to know more about (OPERAS services, etc.)?¹¹

¹¹ A complete overview of all the suggestions can be found publicly here: shorturl.at/dryzB.



Other research infrastructures operating in the Netherlands are interested in collaborating with OPERAS. However, to explore such collaboration and engage at the necessary level, OAPEN needs additional human resources. Therefore, conversations with the Dutch Ministry and the Dutch Research Council (NWO) have been going on for some time to explore funding opportunities for the national node. NWO has asked all research infrastructures operating in the Netherlands to fill in a questionnaire and a factsheet which will inform NWO about the need for financial support. Based on this survey NWO has selected a portfolio of 47 national and international research infrastructures operating in the Netherlands, of which OPERAS belongs to a group of 10 infrastructures within the domains of social sciences and humanities. However, neither a decision of financial support to OPERAS (via membership) nor support of a national node has been made so far (December 2023).

OAPEN is looking for institutional partners in the Netherlands to strengthen OPERAS' position in the country. Exploratory meetings on this topic have been held, and more meetings are planned.

OPERAS and OAPEN are prepared to help answer the questions, challenges, and priorities that NWO is proposing to the social sciences and humanities domain in its National Roadmap for Large-scale Research Infrastructures 2021 (p. 53) and therefore ready to collaborate on the proposed SSH Macroscope.

Considering the research infrastructures currently engaged in the SSH Macroscope initiative, it appears that the OAPEN open access book infrastructure alongside some of the services in the OPERAS service catalogue (like PRISM, Metrics, and GoTRIPLE), would match well within the Dutch large-scale RI coherence providing an interoperable platform that could link to research data, archives, multi-media across scholarly disciplines and languages. In other words, there is a role for OPERAS to play in the Netherlands. However, issues of funding are still to be solved, and partnerships to be established.

OPERAS-PL

The Polish National Node (OPERAS-PL) was launched in June 2021 during an open seminar organised by the Digital Humanities Centre at the Institute of Literary Research of the Polish Academy of Sciences (IBL PAN). Earlier, the IBL PAN team of open science specialists created a strategy for the national node, presenting the main goals and action plan for the coming several years. Shortly after the seminar, the monthly OPERAS-PL newsletter was launched, and the team started regular

communication via Facebook and Twitter accounts. Currently, OPERAS-PL has over 340 e-mail subscribers.

The initial text of the OPERAS-PL strategy was reworked in a project proposal which was submitted to the Polish Ministry of Education and Science's call for projects in spring 2022. It received funding and started officially in September 2022 (with a completion date of August 2024). The main goals for the two-year project were formulated as follows:

- 1) Fostering innovative forms and practices of open scholarly communication in the Polish humanities;
- 2) Introducing new standards for evaluating innovative research outputs and open access publishing;
- 3) Developing competencies of Polish researchers in open scholarly communication.

The goals are achieved through a list of actions, such as:

- working out a new open access publishing model for Polish humanities monographs;
- publishing a digital monograph on innovative scholarly practices in the humanities;
- collaborating with various stakeholders and decision-makers on changing the evaluation criteria for open access and digital research outputs;
- organising a series of workshops for publishers, editors, librarians and researchers on various trends and practices of open scholarly communication;
- promoting open access and innovative research outputs on social media as well as open seminars and events.

The OPERAS-PL mission is to create a knowledge hub focusing on e-infrastructures, open scholarly practices and open access models for the Polish SSH. The team works on bringing together various groups within the Polish SSH community: researchers, academic institutions, publishers, librarians and policy-makers, in order to create a consortium for the Polish OPERAS infrastructure. Including OPERAS-PL on the Polish Roadmap for Research Infrastructures will help sustain the initiative and make it a credible partner for other stakeholders in Poland. Selected community building and dissemination actions:

- Community building activities for publishers and editors: design thinking workshops, webinars with foreign experts and publishers, mailing list for dissemination and networking;
- Preparation for applying to the Polish Roadmap for Research Infrastructures (spring 2024): partnering with ICM UW, Silesia University in Katowice, University of Poznań, University of Łódź and others;



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- Presentations on numerous local and international events, lately at the Digital Humanities Conference 2023 in Graz;
- OPERAS-PL strategy presented in a poster “OPERAS-PL development strategy for local open scholarly communication” at the 17th Munin Conference on Scholarly Publishing 2022¹²;
- OPERAS-PL featured in the Digital Humanities Centre promotional videos¹³;
- Queens of Humanities social media campaign aimed at preparing the community for the project through engaging Facebook posts about innovative publications. The effects of the campaign were presented at the DARIAH Annual Event (Athens, Greece and online, May 31st - June 3rd 2022) in a poster: “Queens of Humanities: stories to attract and engage” and presented at DARIAH Campus¹⁴.

OPERAS-PL explores opportunities for meaningful collaborations with other Polish nodes of international consortia, such as DARIAH-PL and CLARIN-PL. With DARIAH-PL (mainly its new initiative Dariah.Lab¹⁵) it has already established a fruitful collaboration regarding the Open Access models and digital transformation for the Polish scholarly presses and publishing houses in the area of humanities disciplines. With CLARIN-PL it has started a series of workshops on data management in the area of literary research and corpora studies.

OPERAS-PT

The Portuguese national node is in the process of being implemented. In January 2022, a core group of four institutions that are already part of OPERAS (Coimbra, Nova-FCSH, ISCTE-IUL, together with APEES - Portuguese Association of Higher Education Presses, representing 12 academic presses) answered positively to the call launched by the Portuguese national funding agency (FCT - Fundação para a Ciência e a Tecnologia) for the expression of interest regarding the National Roadmap for Research Infrastructures (RNIE)¹⁶.

¹² Poster available at: <https://septentrio.uit.no/index.php/SCS/article/view/6650>.

¹³ Available at: https://www.youtube.com/watch?v=C-UMZvOuRks&list=PL0ED3zILS-Ehsc8_nT8IsIRj-fopoBdXz&index=2.

¹⁴ Documentation available at the links: <https://zenodo.org/record/6598348#.Y7QgCXbMI2w> and <https://campus.dariah.eu/resource/posts/queens-of-humanities>.

¹⁵ For information on DARIAH Lab: <https://lab.dariah.pl/>.

¹⁶ Information on the call available at: <https://former.fct.pt/apoios/equipamento/roteiro/index.phtml.en>.

The institutions that started the process (Coimbra, Nova-FCSH, ISCTE-IUL, and APEES) cover a relevant sample of the national higher education institutions involved in SSH, and the OPERAS-PT node will give the impulse to cover the whole academic system.

Planned activities and performance indicators of the infrastructure (2023-2027):

1. Opportunities and challenges for OPERAS-PT

- Identifying resources pertaining to the implementation of the node and involving national stakeholders (service users, regulatory agencies, funders...);
 - Identifying specific needs and defining targeted solutions connected to local realities, providing support and training to regional communities (e.g. small-sized publishers, learned societies, research centres);
- Suggestion of indicators: stakeholders involved; geographical covering; targeted training.

2. OPERAS-PT and OPERAS central hub

- Deepening the relation between the central hub and OPERAS-PT and its inclusion in the governance model;
 - Engaging OPERAS-PT in the development of the hub's working programme by bringing in national strengths;
- + Indicators: OPERAS-PT alignment with the central hub and its contribution to OPERAS global program.

3. Other national and international SSH nodes; multilingualism

- Identifying intersections, opportunities for collaboration and risks of overlapping with other already existing national nodes and specify the added value of OPERAS-PT;
 - Exploring paths to reach beyond Europe, to include international needs in OPERAS (by learning from them), and to bring OPERAS' services to the world;
 - Multilingualism: boosting strengths with countries that share a common language and cultural affinities, namely by developing a platform to support academic translation: see OPERAS-PLUS D5.5 – Design components architecture to support the translation platform (M12)¹⁷.
- + Indicators: level of integration with other national and international RIs; degree of translation/publishing platform maturity.

4. Resources needed and strategies for attracting funding

The partners commit 'in-kind' support to the node, but the stability of the infrastructure will also depend on the support it receives from its inclusion in the RNIE¹⁸, from

¹⁷ Link to the deliverable on Zenodo: <https://zenodo.org/records/8289219>.

¹⁸ Portuguese Roadmap of Research Infrastructures:



competitive funding, and possible freemium services. The resources required are essentially human resources, and scientific and technical equipment for the development and maintenance of the academic translation/publication support platform.

OPERAS-SI

The Social Sciences and Humanities community of stakeholders already exists in Slovenia (although not formally), and is relatively small. Stakeholders are well aware of their activities and needs, and key institutions are already collaborating in other European initiatives such as DARIAH and CLARIN. OPERAS was mentioned as an emerging infrastructure on the Slovenian roadmap (Načrt razvoja raziskovalne infrastrukture 2030 [Research development plan Infrastructure 2030], NRRI 2030)¹⁹ in May 2022. So it is important to present the services of OPERAS to stakeholders as completed, high quality and useful.

As part of the preparation phase of the Slovenian national node, the Research Centre of the Slovenian Academy of Sciences and Arts (ZRC SAZU) has been actively involved in the GoTriple project by providing information that could make GoTriple work in Slovenian. ZRC SAZU intends to use the presentations of the services, such as GoTriple, VERA and Pathfinder, as a showcase for OPERAS. If all the services that OPERAS is preparing are available by the spring of 2024, the presentation will certainly be even more successful. Even if the presentation is not yet formalised, the institution reports and informs through its channels²⁰ about the activities of OPERAS (e.g., the conference in Bonn on GoTriple, the presentation of the PRISM service, surveys of the DIAMAS project, etc.), and offers support to other national nodes of OPERAS, which want to present the broader European landscape of open science. By participating in the activities of the more active national nodes, the institution gets a clearer idea of how to present OPERAS more effectively in Slovenia.

<https://former.fct.pt/apoios/equipamento/roteiro/>.

¹⁹ Link to the roadmap: <https://www.gov.si/assets/ministrstva/MIZS/Dokumenti/ZNANOST/Novice/NRRI-2030/NRRI-2030-SLO.pdf>.

²⁰ Communication channels used by ZRC ZAZU, including Facebook, Twitter and other webpages.

ZRC SAZU has also joined the Slovenian Open Science Community, which was established in October 2022²¹ (one of the outcomes of the NI4OS project)²². Until 2023, the community currently gathered together 27 Slovenian research and educational institutions from various scientific fields, with one goal: to expand the activities and awareness of open science in Slovenia. ZRC SAZU is a member of the ongoing big national project SPOZNAJ²³ of the community and aims to become an active participant in it. With this participation the institution will be able to answer questions primarily related to publishing and education in the field of open science, believing that this is the main mission of the SSH community, which OPERAS also represents.

OPERAS-UK

The OPERAS-UK node is yet to be fully established. Jisc is in discussion with the UK Arts and Humanities Research Council (AHRC) regarding a proposal to fund the node for three years from April 2024 (2024-2026). If accepted, Jisc will become the national node for the UK.

The proposal highlights the relevance of OPERAS services to a UK audience and also the opportunities for the UK SSH sector. This includes both the research sector and the Galleries, Libraries, Archives and Museums (GLAM) sector. The proposal discusses the relevance of OPERAS services for collaboration (GoTriple), citizen science (VERA) and support of the new UKRI open access policy for monographs, book chapters and edited collections, which came into effect on 1 January 2024 (PRISM). It also highlights the opportunity for UK projects, such as the [Towards a National Collection](#) project, to open them up to new research opportunities and encourage the public to explore them in new ways across the ERA.

If the proposal is accepted, the first task of the UK node will be to create a roadmap and engagement plan. In addition, an important part of the work of OPERAS-UK will be to evidence the engagement of UK researchers with OPERAS UK training events and use of OPERAS services. It is hoped that increased discoverability of SSH open access resources, projects and collaboration opportunities will greatly benefit UK researchers and that this can be clearly evidenced to AHRC. If initial funding is successful, the development of OPERAS KPIs for services is essential for funding to continue past 2026.

²¹ Details on the Slovenian Open Science community: <https://odprtaznanost.si/>.

²² NI4OS protect details: <https://ni4os.eu/>.

²³ SPOZNAJ project details: <https://projekt-spoznaj.si/>.



OPERAS new Executive Assembly members

Between the OPERAS-PLUS project's beginning and this report's preparation, three new Executive Assembly members have joined the infrastructure. As core members, they are expected to develop national nodes inside their national contexts and have been introduced to the OPERAS structure when welcomed into the consortium. The new members of Spain, Finland and Norway will be the next ones to define a strategy, starting with the “minimum viable”²⁴ node structure, to develop and sustain their national communities. The countries are preparing themselves, with support from the OPERAS central hub and the already existing nodes, to sustain the work to be done in the next half of the OPERAS-PLUS project (months 19 to 36).

4. Establishing a National Node: goals, challenges and opportunities

As an introduction to this section, we present some preliminary steps for all OPERAS national nodes that will align with the goals and facilitate collaborative work:

- a) To navigate and analyse the national open scholarly communication landscape

The nodes need to map the scholarly community that they would like to approach, analyse it, and decide on the communication strategy and plan.

- b) To map the needs of your community

From the previous mapping, what is it that the community needs most/in the first place?

- c) To approach existing networks

To identify key players/national organisations in the community and to be receptive to their recommendations. The key is to connect and learn about them and from each other.

The connection with existing networks also helps in the coordination of policies and legal issues.

²⁴ Details on the definition of the so-called “minimum viable” node can be found at the first OPERAS-PLUS Work Package 7 Deliverable, “Roadmap for the implementation of OPERAS national nodes”: <https://doi.org/10.5281/zenodo.8289238>.

Goals

Building on the work carried on in the first year of OPERAS-PLUS, this section incorporates the four main points/objectives envisioned for the development of national communities (first developed in Deliverable 7.2 of OPERAS-PLUS):

The four main objectives or focal points for the OPERAS national nodes include: 1) increasing awareness of OPERAS among national scientific landscapes; 2) facilitate networking, connecting with institutions, libraries, data centres and others via events, personal contacts and similar initiatives; 3) Work on the collection of needs inside national communities, facilitating the understanding of new potential partners; and 4) Participate in the dissemination of OPERAS services and filling the needs of the national scientific communities with a hands-on approach.

Challenges

Benefitting from one face-to-face meeting between some of the nodes that occurred in October 2023 (during the CCC Conference by COESO and Pro-Ethics projects), some challenges have been gathered by part of OPERAS national nodes. The intention of putting together these challenges in different areas is to be able, as a group of nodes with diverse contexts and backgrounds, to identify common difficulties to overcome.

The challenges gathered (originally in a Miro Board²⁵) were discussed on many fronts, which can be organised as follows, into five main blocks: building a national network; defining a training strategy; working on the alignment and governance inside OPERAS; sustaining a national node in the long run and working on communication.

a) Challenges in building a national network

Challenges in the building of a national network divide into two main issues: first, structural ones, and second, the definition of a unique selling point for OPERAS national nodes.

Regarding the structural issues, some points of attention were identified:

- The need for a framework agreement;
- The possible difficulty of having single-institution participation (versus a higher possibility of associations participation);

²⁵ Available at: <https://miro.com/app/board/uXjvNeGUw1o=/>. More information on the CCC conference is available at <https://ccc.sciencesconf.org/>.



- Difficulties to manage different levels, as in the Netherlands (OPERAS-NL) example, where different Research Infrastructures operate: ESS, SHARE, CLARIN, DARIAH, CESSDA, EHRI, E-RIHS, GGP, RESILIENCE, OPERAS. Some of them are national, and some are international.

Regarding challenges for the definition of the unique selling point, some questions arise:

- Why should institutions (which are already cooperating) also be involved in OPERAS? What do they get, and what has to be or can be their input?
- Is the main goal to promote services or topics of OPERAS? How can the national nodes contribute to demonstrating that OPERAS is different from other existing infrastructures?²⁶

b) Training strategy challenges

As seen from previous discussions and in the State of the Art, training is a central point for national node structuration. Because of that, a good national training strategy and a sufficiently robust schema of action inside each country can be key to a node's success and sustainability as a player in the national context.

Defining training goals is a first challenge, considering that the nodes' representatives may not necessarily be experts on all the proposed topics (such as OPERAS services, for example). Because of that, the aforementioned Training Strategy²⁷ will help achieve internal activities and also make viable and feasible possible synergies with other national infrastructures and/or associations.

Finally, target groups should be defined in order to better filter the effort and the potential impact of the training activities. For that, some questions were gathered to help the nodes deal with the training challenge:

- Why should researchers join the services?
- At what level of development should a service be promoted?
- What is the best solution regarding the size of the training groups, considering that small ones can be more time-consuming, but also more effective?
- What services and topics are more appealing to your national context?

²⁶ It is important to note that one of the main challenges (common indeed to all the ESFRIs) is that we have to show we work with the others (i.e., we are complementary) but that we are sufficiently different to be unable to merge with others. The most efficient way to highlight our differences and the fact that we are essential is to show the usefulness of our services for our researchers.

²⁷ The OPERAS Training Strategy is being designed by the Community Manager of the OPERAS Coordination Team, helping to turn this challenge into a good opportunity for development in the national nodes.

These first questions should offer space for planning and a better definition of targets inside each community.

c) Governance and alignment challenges

The nodes must have frequent exchanges with the OPERAS central hub to inform about developments within the national community regarding interesting services/tools/developments and ask for news/info material to reuse. The nodes are needed to co-build the strategy with the central hub in a back-and-forth manner. The central hub acts as a coordination body between the different nodes in order to guarantee a coherent approach and strategy. Indeed, one of the riskiest situations in a research infrastructure is the possibility of having more and more different approaches and less complementarity between the nodes, which can act in an autonomous way as if they were not related to anything else. Strong and recurrent relations between the nodes and the central hub are necessary to avoid this risk and to secure the unity of the research infrastructure.

In the development of the OPERAS-PLUS project, the alignment with the central hub and the positioning of the national nodes inside OPERAS bodies is under construction. This deliverable is due in Month 18 of the project, while the definition of closer ties inside OPERAS' bodies will be delivered in Month 33 of the project. Therefore, important work on the alignment and the governance building is still to come in OPERAS-PLUS.

d) Sustainability challenges

Sustainability challenges often relate to funding. In a context where not all of the nodes are yet funded or have funding opportunities planned, we developed a set of basic activities to help sustain the existence of the national nodes with few resources and mostly in-kind contributions from the lead institutions.

Defined in Deliverable 7.2 of OPERAS-PLUS were activities such as: the establishment of regular national meetings at least every 3 months; the consistency in participation of regular meetings between OPERAS Coordination Team (OCT) and nodes representatives: the update about any important developments of the node for the OCT; the provision of trainings that are kindly made available from the OPERAS strategy for the nodes; and the provision of communication, nationally, about OPERAS activities.

Regarding funding options and needs, normally the first need deals with human resources funding (in FTEs). Other funding outlets are the ones that come from projects but are limited in time, and possible future membership fees. More funding options will



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be discussed in the next half of the OPERAS-PLUS project and aligning as well with changes in the OPERAS governance strategy.

e) Communication challenges

Communication is one key element both for OPERAS and for OPERAS national nodes. Their activities are highly dependent on an efficient strategy not only to address stakeholders but as well to keep cohesion inside the community and between national and international levels. On the other hand, a challenge that respects communication issues can be as well seen as an opportunity (in the case of OPERAS central hub support to the nodes).

- Internal communication issues:
 - To keep up to date with what is happening in OPERAS
 - Communication between the hub and the nodes
 - Ongoing coordination between nodes.

- External communication issues:
 - A communication kit from the central hub to support the nodes would be good for helping national activities.

Opportunities

This subsection brings some examples of opportunities of the nodes presented in the State of the Art, combined with opportunities that are part of the further development of OPERAS as an ERIC and the consequential strengthening inside its bodies.

- Align activities that are already emphasised by each member of the OPERAS Executive Assembly with possible activities to be developed by the nodes (e.g. the focus of the Polish node on innovation, the focus of the Portuguese node on multilingualism, the focus of the French node in some specific OPERAS services etc).
- To enjoy OPERAS growing portfolio of services to be able to showcase them in particular nodes; the same goes for the existence of the OPERAS training strategy in development by the Research Infrastructure.
- Creation of synergies between new members of OPERAS in the national landscape (e.g. the Italian national node) and between other infrastructures (e.g. the Italian and the Netherlands national nodes).
- The development of common publications related to the topics most prominent

in the nodes (e.g. the Polish node with publications regarding the OPERAS Innovation Lab).

- Organising local task forces dedicated to prominent Open Science topics (such as innovation and multilingualism, as examples from the Polish and the Portuguese nodes).
- Creating a robust national community to reinforce connections to the OPERAS Special Interest Groups.
- Contributing to the institutions' Open Science policies.
- As already pointed out in the Challenges section, the OPERAS support in regards to communication (with the provision of a Communication Kit) and training materials (with the provision of the OPERAS Training Strategy, to be tailored for each context) are major opportunities for development for the OPERAS national nodes.

5. Conclusions and a way forward

This deliverable has been prepared halfway through the 36-month OPERAS-PLUS project. Therefore, this document situates many important topics concerning the history and the future of the OPERAS national nodes and their interrelations and alignment (be inside the national contexts, be at the European level).

Building on the work accomplished during monthly meetings inside the project, an internal kick-off, bi-monthly meetings with the OPERAS OCT National Nodes Liaison, and also with the opportunity for some of them to meet in person in the year 2023, this document is a collective effort to put into order and set up common paths of development not only for 13 nodes, but for the growing number of OPERAS core members to come.

The document provided a very thorough state-of-the-art regarding the national communities history so far, a recap of goals, objectives, and the importance of national nodes, bringing to light common challenges and opportunities for the continuous work to be done.

The continuity of the work in progress will be revealed in this Work Package final deliverable, 7.3, which will provide in Month 33 a consolidated roadmap that derives both from the first version (Deliverable 7.2) and this very Deliverable. The OPERAS Conference, to be realised in April 2024, will also provide a renewed opportunity for all the OPERAS nodes representatives to exchange ideas, challenges and proposals for improvement.



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