

## WP3: Support to OPERAS Research Infrastructure

### Handbook for national nodes

26/02/2021

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This project has received funding from the European Union's Horizon 2020 research and innovation programme under grant agreement No 871069

**Deliverable 3.3**  
**Handbook for national nodes**

**Grant Agreement number** : 871069  
**Project acronym** : OPERAS-P  
**Project title** : Open Scholarly Communication in the European Research Area for SSH - Preparation  
**Funding Scheme** : INFRADEV-02-2019-2020  
**Project's coordinator Organization** : CNRS-OpenEdition  
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**WP and tasks contributing** : WP3 - Task 3.3  
**WP leader** : CNRS (OpenEdition)

**Dissemination level** : Public  
**Due date** : 30/06/2020  
**Delivery date** : 26/02/2021



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## I. Introduction

This deliverable has been written in the context of the OPERAS-P project Task 3.3, to support the actions of the national nodes toward their national communities. Currently, OPERAS' national nodes are organising their communities on the basis of:

- the practices and recommendations developed in two working groups (the OPERAS' Special Interest Group on Best Practices and the OPERAS' Special Interest Group on Advocacy),
- the OPERAS-P project's Task 3.3, that supports the national nodes with the organization of national events and Core Group meetings, by translating and publishing, by aligning with their national roadmaps and by creating a handbook intended to support their activities.

The Handbook for National Nodes has been designed to present the documentation supporting the communication and activities of OPERAS' national nodes towards their national community. In addition to providing an overview of the structuring work carried out to define the links between the infrastructure, the nodes and the communities, the Handbook is also intended to be the entry point to the documents and tools that will support the action of the nodes. The Handbook must therefore be seen as a user guide intended to the national nodes, linking to the main strategic documents at their disposal and setting out how they can find and use them. Moreover, the Handbook for National Nodes is a living document that will be regularly updated with new tools and documentation developed by and for the OPERAS' community.

Currently, the Handbook includes four sections, each linked to a specific dimension:

1. The OPERAS' fact Sheet, to address potential funders and policy makers at a national level
2. The landscape study on funders and funding mechanisms, to help the community to access funding mechanisms
3. The roadmap for the Special Interest Groups, to welcome new members in the community
4. The OPERAS' Advocacy Guide, to advocate towards researchers and the national communities



## II. The Handbook for National Nodes

You will find below the Handbook for National Nodes.

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OPERAS

open access in the european research  
area through scholarly communication

# Handbook for National Nodes

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OPERAS Consortium - 2021

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## CONTEXT

### THE HANDBOOK

*The Handbook for National Nodes* has been written in the context of the OPERAS-P project (an H2020 project funded by the European Commission) to support the actions of the national nodes of OPERAS Research Infrastructure toward their national communities.

In addition to providing an overview of the structuring work carried out to define the links between the research infrastructure, its nodes and the national communities, this handbook has been designed as an entry point to access documentation and tools that will support the activity of OPERAS' national nodes. The handbook must therefore be seen as a user guide intended to the national nodes, to guide them to the strategic documentation designed by OPERAS for them and to provide guidance on how to use this documentation.

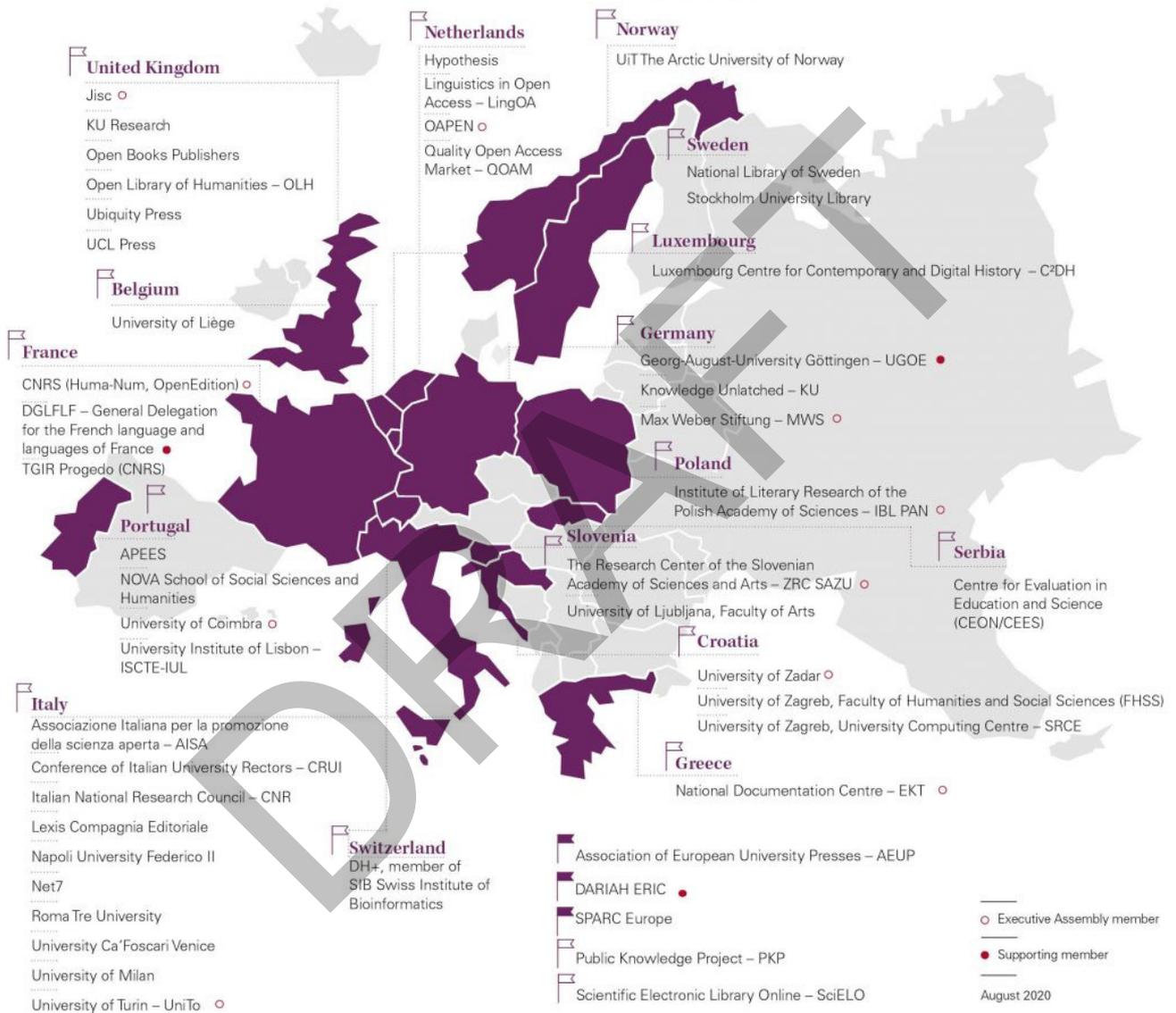
### THE NATIONAL NODES

OPERAS is a distributed infrastructure which gathers 58 organisations from 17 countries. This distributed structuring calls for a specific organization of the links between the infrastructure, its national nodes and the national communities.

So far, 10 organizations in Europe have agreed to steer OPERAS on its path to maturity and to act as a national node. These organisations, called Core members, are visible on the map next page.

## OPERAS Members

OPERAS gathers 58 organizations from 17 countries and is led by a 10 members Executive Assembly. OPERAS is coordinated from France by OpenEdition and Huma-Num.



## DOCUMENTS AND TOOLS TO SUPPORT THE ACTIVITIES OF THE NATIONAL NODES

### PRESENTATION OF THE RESSOURCES INCLUDED IN THE HANDBOOK

To support the actions of its national nodes toward their national communities, OPERAS Research Infrastructure has designed four strategic documents:

- 1) **The Fact sheet**, to address potential funders and policy makers at a national level;
- 2) **The Landscape study on funders and funding mechanisms**, to Enhance sources of financing thanks to a better understanding of the funding mechanisms and the expectations of private funders;
- 3) **The Roadmap for the Special Interest Groups**, to welcome new members of OPERAS in the community and guide them to the Special Interest Groups;
- 4) **The Advocacy Guide**, to address researchers and national communities on open access in the SSH and advocate.

Documents	Intended users	Targets	Level	Use and content
<b>The Fact sheet</b>	OPERAS' members	Potential funders, policy makers	National level	Address potential funders and policy makers in providing an overview of OPERAS' vision, mission, added value, structuration and community.
<b>The Landscape study on funders and funding mechanisms</b>	OPERAS' community	Potential funders	European level	Enhance sources of financing thanks to a better understanding of the funding mechanisms and the expectations of private funders. Enforce the advocacy for a sustained valorisation and development of the scholarly communication in Europe.
<b>The Roadmap for the Special Interest Groups</b>	OPERAS' national nodes	New members of the OPERAS' community	OPERAS' community	Welcome new members and direct them to the Special Interest Groups.
<b>The Advocacy Guide</b>	Stakeholders actively involved in Open Access in the SSH	Researchers, research organisations, policy and decision-makers, libraries, infrastructure providers, publishers, publication platforms	National level	Address researchers and national communities on open access in the SSH, using the recommendations and tools included in the Advocacy Guide.

### THE FACT SHEET - ADDRESSING FUNDERS AND POLICY MAKERS AT A NATIONAL LEVEL

Link: [https://drive.google.com/file/d/1wnJ5d9Ci3VqLNff2Eu8xUuX9dSheJt4\\_/view?usp=sharing](https://drive.google.com/file/d/1wnJ5d9Ci3VqLNff2Eu8xUuX9dSheJt4_/view?usp=sharing)

OPERAS' Fact sheet has been designed for the members of OPERAS, to provide an overview of OPERAS' vision, mission, added value, structuration and community in order to address potential funders and policy makers at a national level.



It includes the following elements: 1) OPERAS' definition, mission and vision, 2) OPERAS' value proposition, 3) What OPERAS is not, 4) How OPERAS works (presentation of the services and Special Interest Groups), and 5) OPERAS community.

The Fact sheet	
<b>Intended users</b>	Members of OPERAS
<b>Targets</b>	Potential funders and policy makers
<b>Level</b>	National level
<b>Use and content</b>	OPERAS' members can use the fact sheet to address potential funders and policy makers at a national level, in providing an overview of OPERAS' vision, mission, added value, structuration and community.

## THE LANDSCAPE STUDY ON FUNDERS AND FUNDING MECHANISMS - ACCESSING FUNDING MECHANISMS

**Link:** [https://drive.google.com/file/d/1hCo2UM\\_TleCvjtmLg0Y7MYGwX5lfh9L/view?usp=sharing](https://drive.google.com/file/d/1hCo2UM_TleCvjtmLg0Y7MYGwX5lfh9L/view?usp=sharing)

The Landscape study on funders and funding mechanism is the result of a joint effort between the OPERAS-P project and the international consortium Invest in Open Infrastructure (IOI).

This study focuses on existing funding mechanisms in the landscape of open scholarly communication in the SSH and, more specifically, on private funders. This study, which will help to enforce the advocacy for a sustained valorisation and development of the scholarly communication in Europe, is intended to enhance sources of financing in the SSH scholarly communication thanks to a better understanding of the funding mechanisms and the expectations of private funders.

The study has therefore three objectives: 1) to collect information on the funding landscape, 2) to structure the data collected into a knowledge base and 3) to make this knowledge base ready for use by OPERAS members and partners.

The study is based on three main sources of data: qualitative web-based research to identify funders and funding mechanisms, in-depth interviews with members of the OPERAS-P community, and extraction of data previously collected by the OPERAS consortium

Landscape study on funders and funding mechanisms	
<b>Intended users</b>	OPERAS' community at large
<b>Targets</b>	Potential funders
<b>Level</b>	European level
<b>Use and content</b>	This study is a first step toward a better identification of funders and funding mechanisms in the landscape of open scholarly communication in the SSH. In addition to helping to enhance sources of financing thanks to a better understanding of the funding mechanisms and the expectations of private funders, this report will help to enforce the advocacy for a sustained valorisation and development of the scholarly communication in Europe.

## THE ROADMAP FOR THE SPECIAL INTEREST GROUPS - WELCOMING NEW MEMBERS IN THE COMMUNITY

Link: <https://drive.google.com/file/d/1WIo1q44iafEsHZXUdPY-1pGCGIHKzRub/view?usp=sharing>

**The Special Interest Groups (SIGs):** OPERAS gathers seven working groups (called Special Interest Groups), each one coordinated by a member of a Core member and dedicated to one of the following topics:

- 1) Advocacy for OA Publishing in the SSH;
- 2) Best Practices;
- 3) Common Standards;
- 4) Multilingualism;
- 5) Open Access Business Models;
- 6) Platforms and Services;
- 7) Tools Research and Development.

The Special Interest Groups work collaboratively, share information, watch and prepare projects on these topics. Thus, the SIGs are the place where new initiatives, new discussions take place and emerge. Their work constitutes the ground on which the infrastructure will build its strategy and prepare its next projects. In this respect, they are one of the key elements for the life of the infrastructure.

Moreover, the SIGs compose the Assembly of the Commons which is planned to engage with the whole OPERAS' community in its diversity and thus they are the entry door for new OPERAS' members.

**The Roadmap for the Special Interest Groups:** The roadmap for the Special Interest Groups is a tool to present the SIGs to the OPERAS' community at large, including members and stakeholders interested in participating in OPERAS' life. Thus it supports the role of the SIG as a first entry point to OPERAS. The roadmap includes a general presentation of the SIGs, their purpose and results, their future development and objectives.

The Roadmap for the Special Interest Groups	
<b>Intended users</b>	OPERAS' national nodes
<b>Targets</b>	New members of the OPERAS' community
<b>Level</b>	OPERAS' community
<b>Use and content</b>	Guide new members of OPERAS and direct them to the right Special Interest Group.

## THE ADVOCACY GUIDE - ADVOCATING TOWARDS RESEARCHERS AND NATIONAL COMMUNITIES

Link: [https://drive.google.com/file/d/1Qokujimp\\_zUCc2RcnOkcu06G6tcTcVY/view?usp=sharing](https://drive.google.com/file/d/1Qokujimp_zUCc2RcnOkcu06G6tcTcVY/view?usp=sharing)

The Advocacy Guide is primarily intended to involve the OPERAS community in advocating for the SSH and Open Science and, in a broader approach, to ensure the sustainable outreach and advocacy for open scholarly communication in the SSH. This guide can be used by all stakeholders actively involved in open access in the SSH. This includes publishers, publication platforms, libraries and infrastructure providers, whether they are members of OPERAS or not.

The Advocacy Guide provides tools for advocacy directed to researchers and research organisations, policy and decision-makers at a national and European level, libraries and infrastructure providers, as well as publishers and publication platforms.

This guide includes:

- 1) Definitions of open science, open access and advocacy;
- 2) A presentation of the Advocacy SIG' main targets and stakeholders;
- 3) Recommendations on how to address researchers' needs related to OA publishing;
- 4) A presentation of the advocacy materials developed by the Advocacy SIG;
- 5) The first results of a panel discussion on advocacy for the SSH.

The Advocacy Guide	
<b>Intended users</b>	All stakeholders actively involved in Open Access in the SSH
<b>Targets</b>	Researchers, research organisations, policy and decision-makers, libraries, infrastructure providers, publishers, publication platforms
<b>Level</b>	National level
<b>Use and content</b>	Address researchers and national communities on open access in the SSH, using the recommendations and tools included in the Advocacy Guide.