OPERAS-D

D5.01 (Communication and dissemination guide)

DESIGN FOR **OP**EN ACCESS IN THE **E**UROPEAN **R**ESEARCH **A**REA THROUGH **S**CHOLARLY COMMUNICATION (**OPERAS-D**)

Deliverable 5.01
Communication and Dissemination Guide

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Project acronym	:	OPERAS-D
Project title	:	Design for Open access Publications in European Research Areas for Social sciences and humanities
Funding Scheme	:	INFRASUPP-03-2016
Project's coordinator Organization	:	CLEO-CNRS
E-mail address	:	pierre.mounier@openedition.org
Website	:	http://operas-eu.org
WP and tasks contributing	:	WP 5 Task 5.01(Communication and Dissemination Guide)
WP leader	:	Max Weber Stiftung (MWS)
Dissemination level	:	Public
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Draft version

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1. How to Use this Document

This Dissemination and Communication Guide is a guideline for dissemination and communication activities of all project partners. It also serves as Deliverable 5.1 "Communication and dissemination guide" and supports reaching Milestone 14 "Website and communication toolbox ready".

The guide identifies the core message of the project to be communicated, the strategy for communication and dissemination, and describes the communication channels that the project uses. It moreover provides an overview of items available to all project partners for download (toolbox) and presents the editorial calendar.

The Dissemination and Communication Guide is subject to change as the project evolves and can be adapted to the project´s needs. The latest version of the guide is available to all partners in the toolbox (see chapter 5).

2. Core Message

The OPERAS-D external communication strategy aims to promote the project and the acknowledgement of its EU-funding to a large audience of stakeholders and target groups. It more specifically aims to promote the following message:

The European landscape in Social Sciences and Humanities (SSH) is poorly integrated. Large publishers protect their traditional stronghold by impeding Open Access (OA) publishing, especially for monographs. New digital research methods demand cutting edge publishing technologies and services. Alternative metrics and innovative concepts of impact measuring offer new possibilities for the evaluation of research. On a national level, OA scholarly communication in the SSH has already witnessed tremendous improvements. Yet, this development is only in early stages on a trans-European scale and a model for sustainable open scholarly communication in the SSH is greatly needed. OPERAS will fill this gap through

- Adopting common standards;
- Sharing research & development;
- Identifying and adopting best practices;
- Assessing sustainable economic models;
- Advocating for OA in the SSH;
- Providing seamless service at a European level.

OPERAS will achieve this ambitious goal by positioning itself as a distributed infrastructure, by fostering openness and generating direct impact, and by evolving research.

Distributed Infrastructure – OPERAS as a distributed research infrastructure will occupy a central position in the ecosystem of scholarly communication. It will coordinate the different stakeholders, i.e. researchers, research institutions, libraries, platforms, publishers and funders on their scholarly communication activities.

Openness – OPERAS will introduce the principle of Open Science and ensure effective dissemination and global access to research results in the SSH.

Direct Impact – Robust services will directly enhance research outputs, particularly regarding their socio-economic impact , open access to high quality content will facilitate the research process, and sharing of technologies and knowledge will noticeably improve scholarly communication infrastructures and initiatives.

Evolvement of Research – Information and studies on the impact of evaluative methods, metric systems, new business models and sustainability strategies will serve as driver for new concepts on impact and measurement of academic merit and will influence the way research is communicated.

3. Strategy

OPERAS-D external communication strategy aims to promote the project and the acknowledgement of its EU-funding to a large audience (general public and SSH research communities). Stakeholders and target groups for external communication are described in more detail in chapters 3a and 3b.

The main elements of the communication strategy include working with a network of communication contacts developed in the course of the project and strengthening the communication message both in terms of content and in the way it is communicated. Active promotion and communication activities, including online and non-electronic communication methods and tools, special events as well as publications, are core activities of this project.

The Horizon2020 project HIRMEOS (High Integration of Research Monographs in the European Open Science), which includes nine partners from the OPERAS consortium under the coordination of OpenEdition, addresses specific needs of the SSH community concerning open access publications. OPERAS-D seeks for synergies with the HIRMEOS communication channels by promoting both projects at events of common interest and by actively showcasing HIRMEOS in all dissemination and communication activities.

a. Stakeholder Analysis

OPERAS-D has four different but complementary target groups for dissemination and exploitation of project results. The stakeholder analysis leads to the following user stories:

Role *"as …*	Need *they want to …*	Intention *in order to …"*
Operators of e-infrastructure services	have a clear vision of their environment	define their development strategy
	know users' needs	develop and provide effective services
Publishers	know current and future services provided by e-infrastructure services	align them with own services and workflows

	know the state-of-the-art of open access publishing technologies	stay competitive and in line with both the market and the users
	understand funders' open access policies	provide proper access models for research outputs
	evaluate the sustainability of open access business models	include open access offerings in their business plans
Libraries	know current and future services provided by e-infrastructure services	reuse the services and enhance own infrastructures and service portfolios
	discover open access content pertinent for their patrons	enhance acquisition and increase provision of research literature
	understand the development of open access sector	to adapt their strategy
Universities (research and education communities)	know current and future services provided by e-infrastructure services and publishers	maximize the impact of their publications
	evaluate the cost of open access publications	plan funds and budgets

b. Target Groups

For communicating OPERAS-D results and developing advocacy material, the following target groups are of particular importance:

Primary target groups
- Non-commercial publishing institutions
- Research libraries
- Funding institutions, decision bodies
- European Commission (EC), national ministries

Secondary target groups
- Researchers
- Universities, scholarly societies, research and education communities

4. Communication Channels

To ensure a steady communication flow and provide durable and citable outputs, several communication channels are utilized. The main communication channels include:

- Promotional material, in particular a flyer and a template for presentations (see chapter 5);
- online communication via the project website;
- direct communication through social media and an e-newsletter;
- as well as face-to-face meetings via participation in conferences and workshops.

a. Target-Channel-Matrix

Target Group	Main Communication Channel
Non-commercial publishing institutions	social media, e-newsletter, flyer
Research libraries	social media, e-newsletter
Funding institutions, decision bodies	project website, e-newsletter
European Commission (EC), national ministries	project website
Researchers	social media, project website, face-to-face, flyer
Universities, scholarly societies, research and education communities	social media, project website, e-newsletter, face-to-face

b. Project Website

A project website has been developed and is available at https://operas-eu.org/. The OPERAS project website is hosted by Hypotheses, a platform for humanities and social science research blogs. The project website is available in English and includes as of now ten menu items. The website will be adapted as the project evolves.

The project websites' main pages are:

- "Home" – main page featuring an introduction to OPERAS (operas-eu.org)
- "About" – an extended introduction to OPERAS (operas-eu.org/aboutoperas)
- "OPERAS-D" – page introducing OPERAS-D (operas-eu.org/operas-d)
- "HIRMEOS" – page introducing HIRMEOS (operas-eu.org/hirmeos)
- "Partners" – a summary for every partner of the project (operas-eu.org/partners)
- "Working Groups" – showcasing the work of the working groups (operas-eu.org/working-groups)
- "Future Governance" – outlining OPERAS future governance model (operas-eu.org/future-governance)
- "News and Events" – displaying OPERAS relevant events and news from the project (operas-eu.org/news-and-events)
- "Bibliography/Links" – bibliography and compilation of links (operas-eu.org/bibliography-links)
- "Promotional Material" – items for download, e.g. the logo (operas-eu.org/promotional-material)
- "Contact" – contact information and credits (operas-eu.org/contact)

Other features on the website include:

- Quick links to all project partner
- Online surveys about services
- Quick links to the latest news ("newsdesk")
- A "follow" button to connect with OPERAS on Facebook, Twitter and LinkedIn
- Registration for the newsletter
- Search function

Project partners have been encouraged to contribute to the bibliography, the events they are contributing to or participating in, the presentation of their organization on the website, and to provide MWS with a logo of their organization.

c. Social Media

The activity in social media channels facilitates a two-way conversation and enables the project to reach a broader audience than through more traditional dissemination activities. It is intended that all OPERAS partners take an active part in the conversations and they are encouraged to use #OPERAS and @OPERASEU for relevant posts on their own social media channels. All social media accounts are administered and maintained by MWS.

OPERAS is on Twitter, Facebook, and LinkedIn. Two formats are used on the social media channels to increase recognition. A format consists of an image (see below for examples) and text that is posted on the social media channel. Format 1, entitled "what´s new" or "save the date", is the main format. It is used to announce important events and to report on results. Format 2, entitled "project partners", introduces all project partners (currently 20) on the social media channels. All social media activities follow the editorial calendar (see chapter 7). Other social media activities include e.g. retweets/likes of partners' events, announcements, or news.

example format 1	example format 2

d. E-newsletter

An e-newsletter will be disseminated in English on a regular basis (every 2-3 month), informing key stakeholders of project developments. Registration to the e-newsletter is open to the interested public and is advertised on the project website and through social media channels.

e. Event Calendar

The event calendar shows the most important annual exhibitions, expositions and congresses that will take place in the following years. The calendar has been created and made available for all project partners on Google Drive: https://docs.google.com/document/d/1xRK0qq1HwtNS48eQiXys7zgT_3JdRKQmbPaZJtPw4pk/edit.

Partners have been asked to indicate if they are planning to contributing to or attending an event. The events are also uploaded to Google Calendar and are available on the OPERAS website (http://operas-eu.org/news-and-events.org). The calendar will be updated continuously.

5. Toolbox

The toolbox includes communication and dissemination material that can be downloaded by interested partners. The material is available on Google Drive: https://drive.google.com/drive/folders/0B1KFzkQSBifyZGlfazBHLUJ6ckE. The most relevant items for communication and dissemination activities of project partners are also available for download on the project website: http://operas-eu.org/promotional-material.

a. Visual Identity

A visual identity for the project has been prepared by the design agency "Oktober Kommunikationsdesign" (http://oktober.de/). The logo has been approved by the Steering Committee on 11 April 2017. All items of the visual identity for OPERAS have been uploaded to the toolbox on Google Drive and include the following:

A logo displaying the project acronym "OPERAS" in different formats (eps, jpg web and print format, pdf, png, svg)

An extension of the logo displaying the acronym "OPERAS-D"

A web banner (png and jpg)

A color scheme defining two primary and 2 secondary colors

primary colour "red": 170/10/45, #AA0A2D
primary colour "purple": 105/35/100, #692364
secondary colour "black": 0/0/0, #000000
secondary colour "grey": 135/135/135, #878787

A flyer, 6 pages, DIN long format	The flyer is currently being developed and soon to be made available. The content of the flyer can be adapted as the project evolves.
Typography	The two fonts used for most communication and dissemination activities are the serif font Utopia Std and the sans serif font Univers LT Pro.

b. Template for Presentations

A basic template for presentations (Power Point) has been developed and is available (pptx) in the toolbox. All stakeholders are free to add their own logo to the presentation template.

page 1   page 2

c. Other Promotional Material

Other texts and promotional material, e.g. articles, reports, videos, will be developed further on in the project if the need arises and will be made available on the project website and/or on Google Drive.

Beneficiaries of the EU's Horizon 2020 research and innovation programme have the obligation to explicitly acknowledge that their action has received EU funding in all communication, dissemination and IPR activities as well as on all equipment, infrastructure and major results funded by the grant. The following statement, which is available in high resolution and in different formats (square or wide format, with frame or without, with transparent or white background, in jpg) in the toolbox and on the website, needs to be included on all activities mentioned above.

This project has received funding from the European Union's Horizon 2020 research and innovation programme under grant agreement No731031
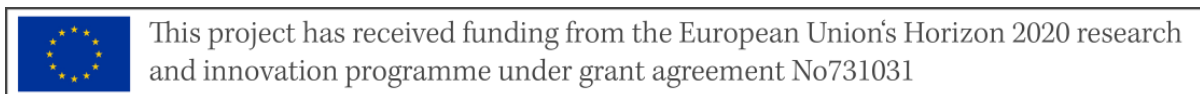
Kindly note that the EU emblem should be used for all communication and dissemination activities, but not the logo of the European Commission.

6. Editorial Calendar

The editorial calendar sets out the frame for all communication and dissemination activities and is followed whenever possible. It includes social media activities (the two formats are color-coded), dissemination of the e-newsletter, and information that is shared through the project website (e.g. the newsdesk).

When	Content	Social Media	Newsletter	Project Website
May 2017	**What´s new:** introduction of project • Key information about OPERAS • Link to website: operas-eu.org • Offer to sign up for newsletter	Yes	Yes (partially)	Yes (partially)
	Partner 01	Yes	No	No
	Partner 02	Yes	No	No
	Newsdesk	No	No	Yes
	1st Newsletter	No		Yes (can be downloaded)
June 2017	**Save the Date:** validation workshop	Yes	Yes	Yes
	Partner 03	Yes	No	No
	Partner 04	Yes	No	No
	Newsdesk	No	No	Yes
July 2017	**What´s new:** results of validation workshop • Landscape study report (EKT) • Map of OPERAS technical environment (CNRS) • Report of the digital visibility of OA monographs through the OPERAS network (KU)	Yes	Yes	Yes
	Partner 05	Yes	No	No
	Partner 06	Yes	No	No
	Newsdesk	No	No	Yes

	2ⁿᵈ Newsletter	No		Yes (can be downloaded)
August 2017	**What´s new:** submission of ESFRI proposal	Yes	Yes	Yes
	Partner 07	Yes	No	No
	Partner 08	Yes	No	No
	Newsdesk	No	No	Yes
September 2017	to be determined			
	Partner 09	Yes	No	No
	Partner 10	Yes	No	No
	to be determined			
	Newsdesk	No	No	Yes
	3ʳᵈ Newsletter	No		Yes (can be downloaded)
October 2017	Partner 11	Yes	No	No
	Partner 12	Yes	No	No
	to be determined			
	Newsdesk	No	No	Yes
November 2017	Partner 13	Yes	No	No
	Partner 14	Yes	No	No
	Save the Date: intermediary workshop	Yes	Yes	Yes
	Newsdesk	No	No	Yes
December 2017	Partner 15	Yes	No	No
	Partner 16	Yes	No	No
	What´s new: results of intermediary workshop	Yes	Yes	Yes
	Newsdesk	No	No	Yes
	4ᵗʰ Newsletter	No		Yes (can be downloaded)
January 2018	Partner 17	Yes	No	No
	Partner 18	Yes	No	No
	Newsdesk	No	No	Yes
February 2018	to be determined			
	Partner 19	Yes	No	No
	Partner 20	Yes	No	No
	What´s new: successful ESFRI application? (posted as soon as results are available)	Yes	Yes	Yes
	Newsdesk	No	No	Yes
March 2018	**Save the Date:** final workshop	Yes	Yes	Yes
	Newsdesk	No	No	Yes
	5ᵗʰ Newsletter	No		Yes (can be downloaded)

April 2018	**What´s new:** final workshop • Report on online survey on optimizing e-infrastructure investments for OPERAS members and of creating complementarities (CNRS) • Design plan for future services operated through OPERAS and roadmap for their development (CNRS) • Final business plan, governance model (OAPEN) • Exploitation guide (MWS)	Yes	Yes	Yes
	Newsdesk	No	No	Yes
May 2018	*to be added*			
	Newsdesk	No	No	Yes
June 2018	**What´s new:** project conclusion • Network building report (CNRS) • Design study and roadmap for the OPERAS e-infrastructure (CNRS) • Report of activities (MWS)	Yes	Yes	Yes
	Newsdesk	No	No	Yes
	6ᵗʰ Newsletter	No		Yes (can be downloaded)

Appendix

I.   OPERAS Design Manual

logo with subline

OPERAS

open access in the european research
area through scholarly communication

OPERAS

open access in the european research
area through scholarly communication

subline minimal 6pt

symbol

Wordmark and Logo

The OPERAS logo consists of a symbol
and a wordmark, which are used as a unit.
The symbol consists of the opened capital
letter "O" and is accentuated by a bracket,
symbolizing the network/governing body.

The letters are based on the font Utopia Std.
The "open" letters symbolize the theme of
"openness". The OPERAS logo, depending on
the use and size, can be used with or without
subline. The subline should not be smaller than
6pt.

The logo can furthermore be used separately,
e.g. as favicon.

OPERAS

OPERAS

OPERAS-D

OPERAS-D

OPERAS

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OPERAS-D

Wordmark and Logo

The OPERAS logo can be used either with or without subline.

There is a version of the logo that is completed by the ending-D (representing Design).

The proportions and spacing, as well as the colour values of the logo and wordmark are not to be changed.

Red

Colour (printing)
CMYK   7/100/70/30
Colour (web)
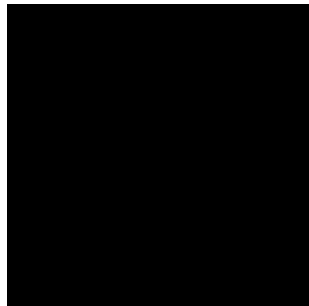sRGB   170/10/45

Purple

Colour (printing)
CMYK   50/90/0/40
Colour (web)
sRGB   105/35/100

Black

Colour (printing)
CMYK   0/0/0/100
Colour (web)
sRGB   0/0/0

Grey

Colour (printing)
CMYK   0/0/0/60
Colour (web)
sRGB   135/135/135

OPERAS Colours

The brand colours are red and purple. These colours are complemented by a pure black, which is used for the subline. A grey colour is used in the black-and-white version of the logo.

Utopia Std

Display
Regular
Sembibold

Univers LT Pro

Light
Roman
Bold

Corporate Typeface

The serif font Utopia Std and the sans serif font Univers LT Pro are combined for the corporate design. The wordmark is set in a modified semibold Utopia Std. The subline uses a light version of Univers.

Utopia Std Semibold

**abcdefghijklmnopqrstuvwxyz
ABCDEFGHIJKLMNOPQRSTUVWXYZ
0123456789 &%,.!?„"/**

Univers LT Pro Light

abcdefghijklmnopqrstuvwxyz
ABCDEFGHIJKLMNOPQRSTUVWXYZ
0123456789 &%,.!?„"/