OPERAS

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

OPERAS CoARA Action Plan

PERIOD: 2023-2027

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Introduction

In 2022, OPERAS Research Infrastructure joined the Coalition for Advancing Research Assessment (CoARA), becoming actively involved in efforts to reform research assessment practices. As a committed member of CoARA, OPERAS is dedicated to publishing an Action Plan that outlines its consistent support for the implementation of research assessment reform.

This Action Plan is structured as follows:

- Section One provides an overview of OPERAS as a research infrastructure highlighting the specific challenges faced by the Social Sciences and Humanities (SSH).
- Section Two details OPERAS` activities related to research assessment reform from 2023 through the first half of 2024.
- Section Three outlines the future direction, presenting the action plan for 2025-2027. While acknowledging a five-year plan as suggested by CoARA, OPERAS is currently at a pivotal stage of its development with a strategic direction to become a European Research Infrastructure Consortium (ERIC). Consequently, the plan will specifically address 2025, 2026 and 2027, considering the potential changes in legal status anticipated in 2027 or 2028.
- Section Four focuses on the mechanisms for monitoring and evaluating the Action Plan, emphasising the importance of transparent reporting on the activities, expected outcomes, and behaviours related to the research assessment reform.

An Annex accompanies this document, presenting a table that aligns the OPERAS Action Plan with CoARA Commitments.

Context: OPERAS Research Infrastructure

Understanding the context of OPERAS is essential for appreciating the Action Plan and its implementation timeline. OPERAS supports open scholarly communication in the social sciences and humanities (SSH) within the European Research Area (ERA). As a non-research-performing or funding organisation, OPERAS does not evaluate individual researchers, project proposals, or institutions based on traditional productivity metrics. However, its activities and services are closely related to the research assessment.

A short description of the services:

Metrics - empowers Open Access publishers, university presses, and libraries by providing usage and impact metrics for published content. Designed with the nuanced needs of SSH in mind, this service consolidates diverse data sources into a single, transparent interface.

GoTriple - Dedicated platform for SSH publications, researcher profiles, and projects that includes multilingualism, creation of links and connections to different data sources, bridging of disciplines, and integrated services..

Pathfinder - designed to help researchers find a solution to their editorial needs in the context of open scholarly communication.

PRISM - gives publishers the opportunity to display information about their peer review procedures in a standardised way, enables inclusion of information as part of the book's metadata and builds trust in OA book publishing by improving transparency around the quality assurance process.

VERA - provides a set of tools to discover potential partners and ongoing projects, define and co-design the activities, co-create new knowledge and solutions, and deliver them to society.

Hypotheses - a platform for humanities and social sciences research blogs.

MONDAECUS - a community-driven translation service platform to foster scholarly collaboration in translating and editing scientific texts.

Innovation Lab - The OPERAS Innovation Lab is a collaborative initiative dedicated to supporting and advancing innovative services and solutions for scholarly

communication in the social sciences and humanities (SSH), paving development pathways for the development of OPERAS Research Infrastructure

OPERAS employs a participatory governance model, including a Scientific Advisory Committee (SAC) and an Executive Assembly (EA), which guide decision-making related to OPERAS activities. It is crucial to highlight how OPERAS values and recognises the contributions of individuals engaged in its governance structure.

At an institutional level, OPERAS participates in numerous initiatives, projects, communities, and activities that promote Open Science practices in SSH and influence research assessment. Key efforts include facilitating open access to a range of research outputs, developing Open Access books, and fostering multilingualism. Reforming research assessment is crucial for incentivising researchers to engage with these initiatives.

Additionally, OPERAS is developing several services indirectly related to research assessment, such as metric tools for open access monographs, a multilingual discovery platform, and a search wizard for finding suitable publishers or service providers. These services exemplify how Open Science and research assessment reform can mutually reinforce each other.

OPERAS has 65 members from 24 countries in the ERA, and its Action Plan addresses the challenges and proposes viable solutions.

OPERAS Activities: 2023-2024

OPERAS activities can be categorised thematically, with some directly related to research assessment and others related to open science practices and participation in funded projects. Some key initiatives include:

Research Assessment Reform Initiatives

OPERAS participates in the GraspOS EU funded project and is leading the SSH pilot to explore how open science can enhance research assessment in the SSH thematic area. This includes several activities:

- Supporting community engagement through consultation workshops and the community practice sessions;
- Analysing the feedback received on SSH needs and desires regarding research assessment reform;
- Providing feedback and recommendations from the community on responsible

research assessment from an SSH perspective.

An internal Workshop for OPERAS Coordination Team to decide on the strategic direction for research assessment for OPERAS:

- The workshop identified possibilities for incorporating and addressing research assessment as a strategic objective.

OPERAS Special Interest Groups (SIGs):

Advocacy SIG - 2023-2024 Topic: Responsible Research Assessment

- Workshop on responsible research assessment by the Advocacy SIG - [Blog Post](#)

Best practices SIG - Topic: Peer Review

- Publication on Innovation Lab: [(Open!) Peer Review: an overview](#)

Participation in CoARA Working Groups:

- Multilingualism and language biases in research assessment
  - Task Force 3: Policy advice and translation tools
- Recognising and rewarding peer review
  - Recommendations for peer review of journal articles, books, and projects
- Evaluating Social Sciences and Humanities research globally
  - Group to start operations in June 2024

OPERAS Conference (April 2024)

- Opening keynote, and closing session delivered discussions on research culture and the need for research assessment reform;
- Multiple sessions tackling peer review and research assessment;

Open Science Practices

Participation in the DIAMAS Project

- Acknowledging differences in publication and dissemination practices between disciplinary and transdisciplinary science and the consequences for research evaluation.
- Providing recommendations and guidelines for institutional leaders and managers (e.g. rectors, heads of library, research departments) and funders,

sponsors, and donors on how to support institutional publishers, service providers and technology providers in creating and disseminating high-quality and interoperable research outputs.

● Acknowledging OS principles, e.g. early sharing of research outputs in an open, transparent, and reusable fashion, which contributes to increasing the quality of research results, maximises the impact on society, and affects the modus operandi of research funding agencies, research-performing institutions, entities responsible for scholarly communication, and research evaluation agencies.

Participation in the CRAFT-OA Project

● Research performing organisations and research funding organisations promote the adoption of persistent identifiers, suitable data models and FAIR-ification via CRAFT-OA services for responsible research assessment.

Development of the GoTriple discovery platform.

● The GoTriple discovery platform is improving coverage of SSH diverse outputs in terms of formats, types of publications, and diversity of languages, a key perspective to support the diversity of careers and outputs in the CoARA Agreement.

Joining the Barcelona Declaration as supporters.

● Excerpt from the announcement in relation to the Barcelona Declaration: *"Becoming a supporter of this declaration is not only a nod to the past of OPERAS and our activities so far, but also a commitment to how we see ourselves moving forward."*

OPERAS Action Plan: 2025-2027

The Action Plan ([see a table format in the Annex of a list of actions](#)) will build on the activities of 2023 and 2024, with a focus on how all activities and services can better support research assessment reform from an open science perspective, enhance infrastructure development, foster community engagement and promote dissemination.

OPERAS commits to establishing a task force by the end of 2024, comprising members of the Scientific Advisory Committee, the Executive Assembly and the OPERAS Coordination Team. The task force will develop qualitative KPIs to measure the implementation of the Action Plan effectively. Its primary role will be to strategically plan how OPERAS can support the reform of research assessment, setting specific

objectives and targets to review activities annually, with all decisions requiring Executive Assembly approval.

Proposed focus areas for the OPERAS research infrastructure from 2025-2027 include:

Open Science Directions

OPERAS will build on previous activities to explore how EU-funded projects producing outputs for the SSH Community can contribute to broader research assessment reform. Key projects include:

GraspOS

GraspOS is working towards supporting the emerging policy reforms and paving the way towards an Open Science aware responsible research assessment system. The SSH pilot lead by OPERAS, will address challenges and provide solutions for critical research assessment issues in SSH producing recommendations, guidelines, general assessment criteria for SSH researchers, and a robust . Open Science Assessment Framework.

DIAMAS:

DIAMAS is a project to promote Diamond Open Access publishing, which highlights the importance of recognising the varying publishing practices across disciplines within research assessment processes..

CRAFT-OA:

CRAFT-OA is working to produce the Diamond Discovery Hub (DDH) which aspires to offer an alternative to established indexes like Web of Science (WoS) and Scopus. By enhancing OJS Core features—such as GDPR compliance, multilingual support, and metadata quality—it aims to improve scientific communication. This improvement is driven by the consistent use of permanent identifiers for research outputs and contributors, which facilitates easier evaluation.

Palomera:

This initiative examines data and policies related to open-access scientific monographs across different European countries.

OPERAS Infrastructure and Services

Key actions will involve defining precisely the role of OPERAS Services in the context of research assessment reform, including:

- Building on the workshop to integrate research assessment into the OPERAS Strategic Objective.
- Exploring how services like Metrics and PRISM can support new assessment methods
- Creating guidelines for research performing organisations (RPOs) and research funding organisations (RFOs) on leveraging information from OPERAS Services for research assessment activities.

- Development of OPERAS Innovation Lab: the Innovation Lab is dealing with the topic of research assessment and innovative outputs. Both perspectives are useful and relevant to the CoARA vision, and it can be a useful tool for communicating topics and debates on research assessment for the SSH.

Community Engagement

To expand community engagement around research assessment reform, OPERAS will:

- Disseminate the Action Plan, encouraging members of the OPERAS Community to participate in its implementation; A secondary aim is for the Action Plan to serve as an example in the National Nodes network inspiring other RPOs or RFOs to adopt it.
- Continue active participation in CoARA Working Groups and promote produced outputs to influence policy.
- Maintain communication with the SSH community for feedback on research assessment, particularly related to the SSH Pilot in the GraspOS project.
- Organise events and joint webinars to foster dialogue on research assessment developments in the OPERAS Community.
- Advocate for the adoption and testing of the HumetricsHSS initiative and SCOPE Evaluation Framework.

Hiring and Appointments

In the hiring and appointments processes OPERAS will:

- Transparently showcase the selection criteria, demonstrating a commitment not only to CoARA initiatives but to frameworks as DORA.
- Produce documentation outlining the decision-making process for electing members to the Scientific Advisory Committee.
- Inform new OPERAS community members about the organisation's commitment to supporting Research Assessment Reform.

- Create or recommend templates for narrative CVs for applicants related to the

OPERAS research infrastructure.

Evaluation and Monitoring of activities

To ensure transparency in tracking activities against set targets, OPERAS will create a public page on its website (operas-eu.org) by the end of 2024. The Task Force will decide on the timing and frequency for evaluations, with subsequent reports published on this new website. Along the same lines, the Task Force will provide each year an updated version of the Action Plan addressing changes, challenges and progress on its key objectives.

While qualitative KPIs have yet to be established, they will be developed alongside quantitative measurements, to provide a balanced approach. The ultimate aim is to track and understand the long-term impact of all the activities.

Examples of future activities may include:

- Knowledge Exchange Events (both online and in-person)
- Service development and usage monitoring.

Conclusions and Next Steps

This Action Plan reminds us of OPERAS's activities in 2023 and 2024 and outlines a pathway for continued efforts from 2025 to 2027. To ensure the ongoing implementation of the Action Plan, the important action is to set up the Task Force, consisting of representatives from the OPERAS Coordination Team, the Scientific Advisory Committee, and the Executive Assembly. The priority remains setting clear goals, objectives, and qualitative KPIs for 2025 in relation to the defined areas of focus from OPERAS Research Infrastructure.

ANNEX

Table: Alignment of OPERAS Action Plan (AP) to the CoARA Commitments: Indicative Actions, Outcomes, Commitments and Timeframe.

Actions	Outcomes	CoARA Commitment - [See here full Agreement.](#)	Timeframe Range
1. Create a Task Force to oversee progress of the CoARA Action Plan	Produce annual recommendations on how OPERAS could be positioned to support research assessment efforts e.g. Join the Barcelona Declaration to support Open Research Information in the evaluation process.	5 - Commit resources	2024 - 2027: TF to oversee the implementation of the AP, and to perform annual evaluation of objectives
2. Create Monitoring page for the progress of the Action Plan	Monitoring progress to transparently review the development of the Action Plan	5 - Commit resources	2024 - 2027: TF to oversee the implementation of the AP, and to perform annual evaluation of objectives
3. OPERAS Internal Workshop on Research Assessment for SSH	GraspOS inspired workshop to engage OPERAS employees on research assessment for SSH: exploring services	7 - Training and Raising awareness internally on research assessment	Completed - 2023
4. Embed Research Assessment Reform in the Strategic Objectives of OPERAS RI Annual Implementation Plan	To produce an Objective, Key Result, Action and KPI for Research Assessment	5, 6 - Review OPERAS Objectives: Strategic inclusion of research assessment will allow for new processes to be explored	2024-2025

5.	Explore the adoption of Narrative CVs for application for OPERAS positions	Adopt an existing template and repurpose for applications related to OPERAS objectives: offer the opportunity to candidates applying for positions within OPERAS, the Scientific Advisory Committee and Executive Assembly to use a Narrative CV	1, 2 - Qualitative assessment of applications	2024-2025
6.	Engage the wider OPERAS Network through the Special Interest Groups	Putting Research Assessment on the agenda - discuss with all SIGs how they could include conversations on Research Assessment	5, 7,8,9 - Resources, Awareness, Communication, Training and Exchange of Practice beyond the Coalition	2025-2027
7.	Advocacy for Responsible Research Assessment	Workshop on Responsible Research Assessment at the OPERAS 2024 Conference: Reflecting on the workshop: https://operas.hypotheses.org/7395	7,8 - Awareness and Communication	2023-2024 (Completed academic cycle with the focus on the topic of Research Assessment)
8.	Participate in Events organised by National Nodes members	PUBMET 2024: Conference with a focus on Research Assessment (different members of OPERAS will engage with topics of research assessment).	7,8 - Awareness and Communication	2024
9.	Submitted an application for CoARA Boost Open Call	Application title: *Advancing Research Assessment Reform in SSH and Citizen Science Through Training and Recognition (CITRUSSH)*	5, 7,8,9 - Resources, Awareness, Communication, Training and Exchange of Practice beyond the Coalition	Completed - Pending outcome of evaluation.

10. GraspOS Public event on Peer Review and Research Assessment	Assessing Open Access Books: Shedding Light on Peer Review with PRISM: https://graspos.eu/training-material	7,8,9,10 - Training, Skills, Awareness and making data openly available	2024 - Completed in May
11. GraspOS Public training on Open Access books and Metrics	Training to be organised in Autumn 2024 to discuss Open Access Books in the Research Assessment environment, and how to Monitor the impact and usage of OA Books using OPERAS Metrics	7,8,9,10 - Training, Skills, Awareness and making data openly available	2024 - Completed in November