

**OPEN SCHOLARLY COMMUNICATION IN THE
EUROPEAN RESEARCH AREA FOR SSH - PREPARATION**

WP4 Transnational Access to Operas Services

**Common Access Point to
Publication Services Specifications**

06.07.2020

DRAFT



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

OPEN SCHOLARLY COMMUNICATION IN THE EUROPEAN RESEARCH AREA
FOR SSH - PREPARATION

Deliverable	D4.1 Common Access Point to Publication Services Specifications
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
E-mail address	: pierre.mounier@openedition.org
Website	: https://operas.hypotheses.org/2774
WP and tasks contributing	: WP4 T4.1
WP leader	: EKT
Due date	: 30.06.2020
Delivery date	: 06.07.2020
Authors	: Lorenzo Armando (coord.), Cristiana Aceto, Maddalena Briganti, Paolo Cagliero, Bianca Gualandi, Alex Steiner



Contents

I.	Abstract	4
II.	Executive summary	5
III.	Questionnaire on scholarly communication services provided by Operas members	6
	A. Questionnaire structure	6
	B. Dissemination and adhesions	9
	C. Analysis of responses	11
	D. Future developments and implementations	24
IV.	Questionnaire for researchers	25
	A. Who did we contact, and who responded?	27
	B. Analysis of responses and lessons for Operas Pathfinder	32
V.	The IT path to Pathfinder	44
	A. The process	44
	B. Hosting	45
	C. Website design	45
VI.	Pathfinder: how does it work?	46
	A. Site map and menus	46
	B. Search engine and records	50
	C. Login and service provider profile	57
VII.	Pathfinder logo	62
IX.	Open issues	63
Annexes		
	1. Operas members questionnaire	
	2. Questionnaire for researchers	

I. Abstract

Main objective of T4.1 was to “help researchers in their selection of an appropriate publishing venue and, generally, of a scholarly communication strategy”. Some guidance to achieve the goal was provided. The solution chosen was to build the working prototype of a tool that was called **Operas Pathfinder**. This allowed not only to respond to the different requests of the task, but to pave the way for the implementation of one of the upcoming dedicated services of Operas, which can be fully tested as of today.

DRAFT

II. Executive summary

T4.1 included among its goals to “proceed in listing the relevant services provided by the OPERAS infrastructure nodes in a central directory, and [...] design a portal to allow researchers select and access the service that best corresponds to their needs. In addition, [...] design a wizard and a series of guiding questions based on the outputs of the OPERAS Design Study regarding services dedicated to open scholarly communication”.

To fulfill the task we carried out the following steps:

- preparation and dissemination of a questionnaire addressed to Operas partners, for listing the services they provide – see chapter III)
- preparation and dissemination of a questionnaire addressed to a balanced selection of researchers – see chapter IV)
- design and implementation of a structure matching up the data collected from the questionnaires, resulting in a tool with two main query modes (“Common Scenarios” and “Detailed Research”), integrated in a fully operating website – see chapters V and VI
- identification of the tool name (**Operas Pathfinder**), with payoff (“**Find your way in the maze of academic publishing in social sciences and humanities**”) and logo design – see chapter VII
- tool test with a restricted selection of researchers, resulting in some improvements and highlighting some open issues to be dealt with in the next steps of the project – see chapter VIII

What has been carried out is therefore not simply the “design of a portal”, but a working prototype in all respects, which could be immediately enriched and brought to a level of development that will allow its effective use by researchers looking for answers to their needs, fully capable of being part of the “web of services relying on complementary and interconnected tools” recommended by Operas Design Study, as well as “a component of a comprehensive toolbox... ensuring trans-national access to the inclusive scholarly communication system of the RI” (T4.1 summary).

Operas Pathfinder prototype is hosted on a server provided by UNITO (Università di Torino), T4.1 leader participant, and reachable at the following public address: <https://pathfinder.unito.it/>. To browse it, at the moment, a backdoor has been installed (<https://pathfinder.unito.it/index.php?bckd=9Xrtsu98g3Dx6cncLKnHCLzh3nX8X6r>).

III. Questionnaire on scholarly communication services provided by Operas members

In order to create a portal that allows researchers to orient themselves in the range of services offered for publication and in a broader sense in relation to the spectrum of services covering academic communication, its valorization and dissemination, we began our work with the construction of a first list of services and needs, based on our experience, related to what is required daily by researchers, then on the services that we have been able to put in place so far, and the experience of other publishers and university press with whom we have had exchanges over the years.

Starting from this first list we then developed two separate questionnaires but linked by this common matrix, with the aim to build the wizard as foreseen by Task 4.1 based on the outputs of our survey.

Here we take into consideration the questionnaire addressed to the members of Operas, whose purpose is to identify and list the relevant services offered in the context of scholarly communication. This first survey necessary for the creation of Operas Pathfinder therefore had two functions:

1. to guide the SSH researchers towards the scholarly communication services provided by OPERAS members that fit their needs
2. to help OPERAS members clarify, including for themselves, what are the services they provide and what is their added value for the community. Therefore, even if you provide your service to the researchers from your institution only, it is important that you answer the survey.

The questionnaire on scholarly communication services is made up of 18 groups of questions, each with a blank field intended to receive indications from service providers regarding services not indicated, but also to express doubts and need for clarification with respect to the questions asked and the terms used. The objectives of this project are in fact the possibility to remain open to new needs of researchers and therefore to the related answers in terms of services, but also to use a common and shared language.

A. Questionnaire structure

The questionnaire consists of 18 groups of multiple-choice questions, none of which are mandatory, in order to keep the questionnaire flexible to the different service provider profiles present among Operas members. We have identified 18 macro-areas in which to divide the questions on the different services:

Type of publication

The question to be answered has been specified in "For which types of publications do you provide scholarly communication services?", which is followed by a list as exhaustive as possible, but always subject to further expansion, of the different types in which research results can be carried out and to which the different services provided are applied.

Subject areas

In this case the reference we used to draw up the list of disciplinary areas is: <https://halshs.archives-ouvertes.fr/browse/domain>.

Languages

The intention with which we have formulated this question is to identify the languages of the research results to which each member provides its services. The space reserved for comments at the end of the question allowed us to resolve an ambiguity and to distinguish between:

- languages of the research results to which services are offered
- languages of the interfaces on which the research results are uploaded
- possibility to manage particular characters (e.g. Greek alphabet)

Editorial profile

The purpose of this group of questions is to profile the service provider so as to enrich a personal data record for each member and clarify whether it is a university press or a commercial publisher, whether it is a regional, national or international, public or private infrastructure.

Scientific validation

This field aims to clarify whether some form of scientific validation is necessary to obtain the services of this provider.

Type of peer review

The question is aimed at clarifying whether the service provider manages the peer review, what type of review it is able to guarantee (single blind, double blind, not blind, open) and whether it relies on systems such as OJS or OMP or whether it is able to provide assistance for the management of the review through these platforms.

Licences

A section that addresses the issue of the different licenses that can be applied to research results and that each Operas member assigns.

Access policy

The question addresses the type of access that can be provided as a service to research results in terms of closed access or open access and the different ways and forms of business models that are used to support open access.

Publication format

This section is divided into two parts in order to render the type of workflow of each service provider. On the one hand we asked to indicate in which formats they publish and then what kind of files they accept.

Editorial aspects and language review

This group of questions is dedicated to what we named pre-publication services, including services such as copy editing and language editing, translation, translation rights or image rights, formatting and pagination, creation of indexes, bibliographic checks and creation of branding. All those services that are primarily provided before the research results have taken a defined form and be shared.

Dissemination and marketing

Another key aspect for academic research is related to the indexing and dissemination of metadata and texts through the different commercial or non-commercial platforms and databases, but also dissemination through relationships with libraries and social networks or more generally whether or not the provider takes over the promotion of the research.

Measuring readership and impact

In this case we tried to indicate the different possibilities and ways to measure the impact of the research, through statistics related to the number of downloads or visits, the number of citations and the use of altmetrics.

Archiving and preservation

The question is intended to establish whether the service offered uses public or private repositories and therefore to indicate the type of perdurably that is guaranteed.

Online publishing

If service providers offers the possibility to publish the search results online, we have asked to indicate which tools are used, whether they use platforms such as OJS and OMP, software such as Lodel or whether they publish online via an autonomous website. We also asked to specify whether these tools are managed and implemented by the service provider or if not, whether support is available.

Standard identifiers

The section is dedicated to the investigation of the main standard identifiers, if these are attributed by the service provider or if there is the possibility to make them visible and then associated to each research result.

Other post-publication services

From this section, the questionnaire concludes with a final survey of what we have called post-publication services and which include a variety of aspects from willingness to pay royalties to the creation of a version that can be publicly annotated. Again, this is a list that does not claim to be exhaustive but can be implemented with new service providers joining.

Other services

In this case we wanted to offer the possibility to report a series of services that are part of the broader set of scholarly communication, such as creation of a website or a database or a software.

Access to services and prices

The last group of questions, on the other hand, aims to provide researchers with information on the business model of the service provider to which they intend to contact, whether an expense is foreseen or whether the services are provided free of charge. We then asked, depending on the geographical location or affiliation of the researcher, whether the different services provided were paid for or not. Any further details will be left to the direct contact between the researcher and the service provider once the latter will be identified through Operas Pathfinder.

B. Dissemination and adhesions

Once established the content of the questionnaire through a series of tests, aimed at removing ambiguities and indicating as many services as possible, trying to assess the correctness of the categories used, it was necessary to select the method of dissemination of the questionnaire. Like all the work carried out for Operas Pathfinder, this aspect was chosen taking into account the needs of the informatic part of the project. If, from one side, the two questionnaires must be able to respond to each other with respect to the fields of survey among researchers and service providers, guaranteeing the possibility of creating a match between supply and demand, from the other side the modalities of data collection had to be chosen in such a way as to facilitate the creation of the database on which to build the portal for the search of services.

We therefore used Limesurvey for the dissemination of the two questionnaires, a choice that involved further reflection on how it would be possible to answer the questions, to introduce mandatory questions, how to integrate services that were not taken into account to allow us to report any difficulties or ambiguities that would have required further work of clarification. Indeed, one of the characteristics of the project is that it remains open and subject to change, so that it can always respond to the changing needs of researchers and thus to the changing services that are offered to meet those needs.

The choice was not to enter mandatory fields, so as not to limit the filling in of the questionnaire and, as already mentioned above, to enter two blank spaces for each question:

- the first to indicate additional services that were not taken into account during the construction of the questionnaire
- the second to collect comments or clarifications

At the end of March 2020 we sent an email to request participation in the project to the 40 members of Operas. In the message we made it clear that the participation and therefore the filling in of the questionnaire, would imply the consent to the diffusion of the services provided through the Operas Pathfinder.

We have thus collected 13 adhesions, but the questionnaires filled in at the date indicated as the end of the survey (15 April 2020) were 12. The number of responses is related to the fact that the members of Operas are not all service providers, therefore not all of them can be involved in the project.

The number of Operas members whose services have been included in the Operas Pathfinder portal, including Lexis, which has set up the survey, is currently 13:

1. INRIA/NERD
2. Italian National Research Council (CNR)
3. Lexis
4. National Documentation Centre (EKT/NHRF)
5. OpenEdition
6. Open Library of Humanities (OLH)
7. Public Knowledge Project (PKP)
8. The Institute of Literary Research of the Polish Academy of Sciences (IBL PAN)
9. University of Coimbra
10. University of Liège
11. University of Ljubljana, Faculty of Arts
12. University of Milan
13. University of Turin

The editorial profile of the different members is composed as shown in the graph¹ (Fig. 1):

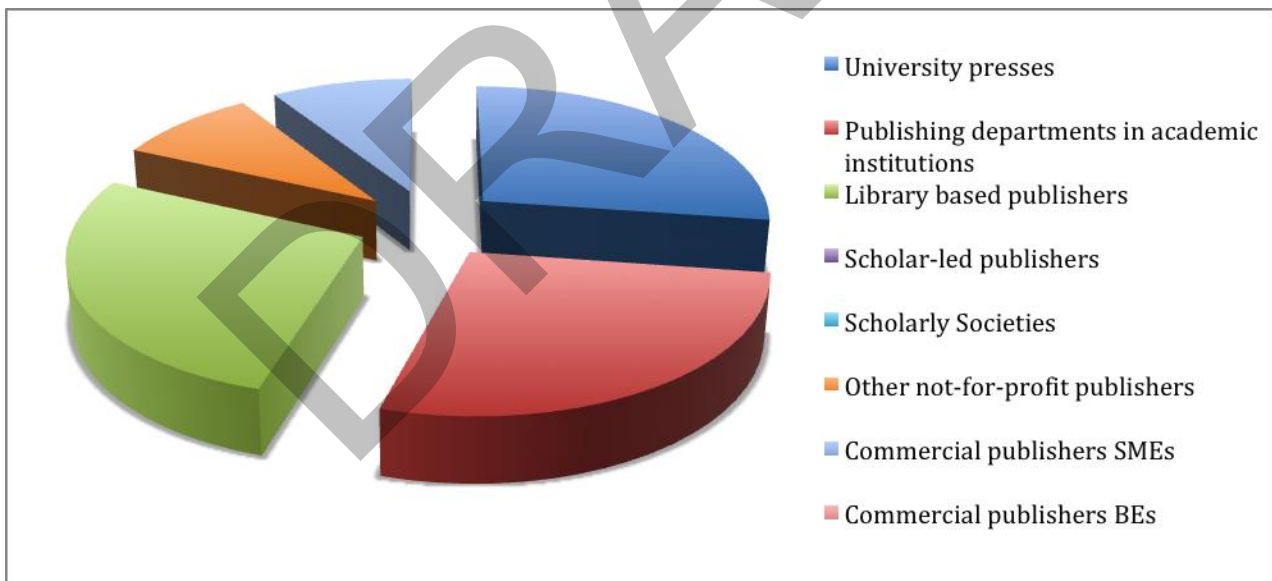


Fig. 1. Type of editorial profile of Operas Pathfinder participants.

C. Analysis of responses

¹ The only exception is OpenEdition which is not identified with any of the types indicated.

On the basis of the data collected through the questionnaires we have elaborated, selecting the fields that we thought to be the most relevant, a quantitative analysis able to highlight the distribution of the various services among the different members of Operas that joined the project and at the same time to favour a comparison with the results collected through the questionnaire sent to the researchers.

1. Types of publications covered by scholarly communication services

The data collected from the first question of the questionnaire (Fig. 2) show that journals and monograph are expected to be the objects on which all service providers work, but all other possibilities considered are also covered.

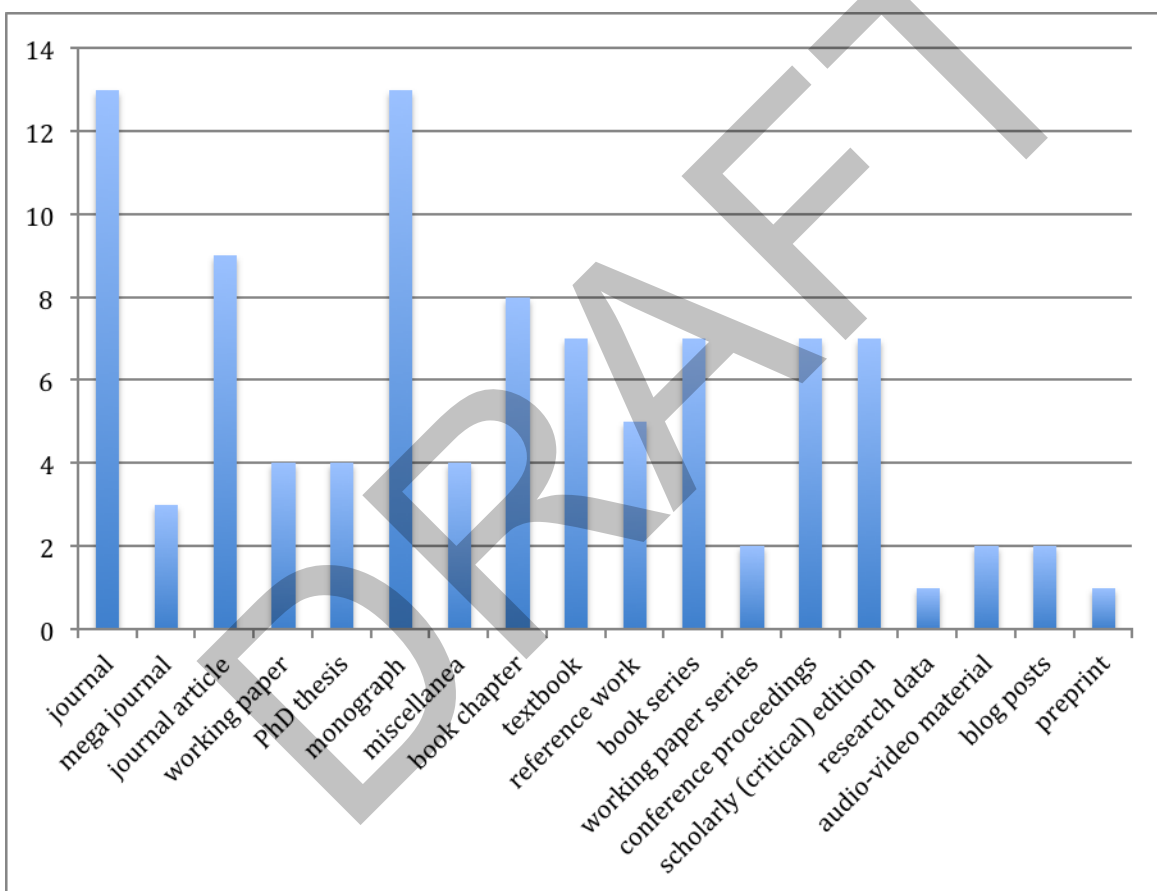


Fig. 2. The graph shows how many of the 13 members who completed the questionnaire provide their services to the different types of research results.

2. Languages covered by services

The question "What languages do your services cover?" in our intention was only about

the language of the research result and not about the interface or the ability to handle particular characters as in the case of ancient Greek. As the graph (Fig. 3) shows, the languages mainly covered are English and French, followed by Italian and Spanish.

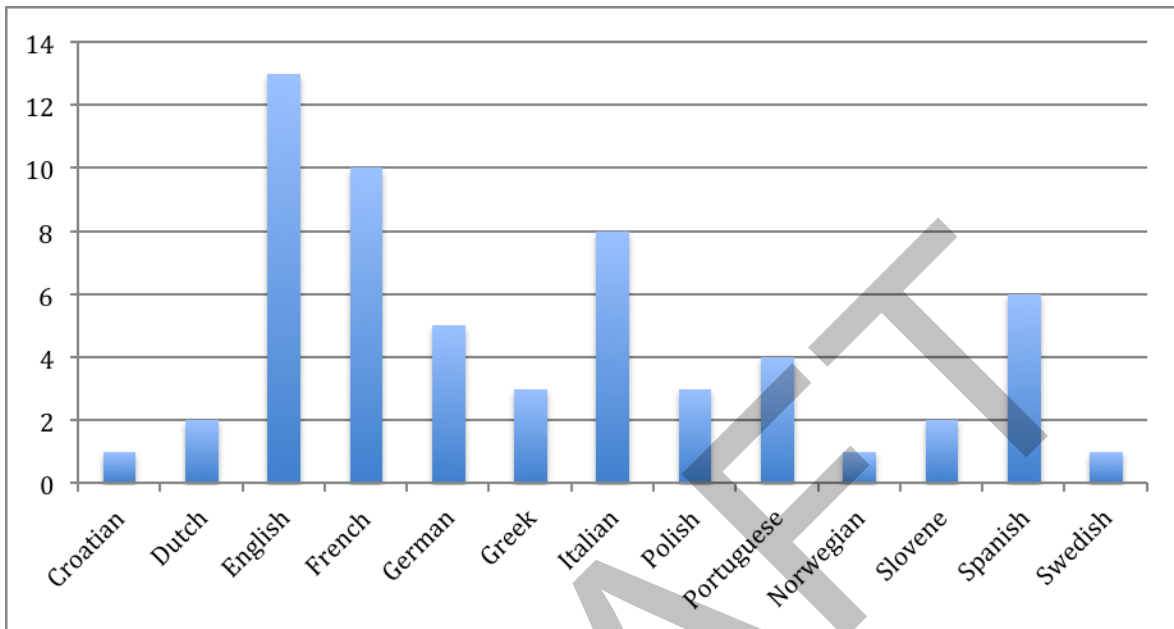


Fig. 3. Number of service providers dealing with different languages.

DRAMA

3. Types of peer review handled

When asked "What types of peer reviews do you handle?" most service providers (Fig. 4) reported that they handle single and double blind peer reviews, only 8% answered that they also handle open reviews.

Then follows a more specific question on the use of possible tools to manage peer review: OJS or OMP².



Fig. 4. Type of peer review managed in percentage by the Operas service providers who participated in the survey.

² We have also been reported: DSpace, Pressbooks and Episciences.

4. Types of licenses allowed

The question "Under what types of licenses do you allow publication?" took into account the different types of licenses (Fig. 5). Most of the licenses that are attributed fall under Creative Commons³, while the General Public Licenses⁴ are almost completely unused.

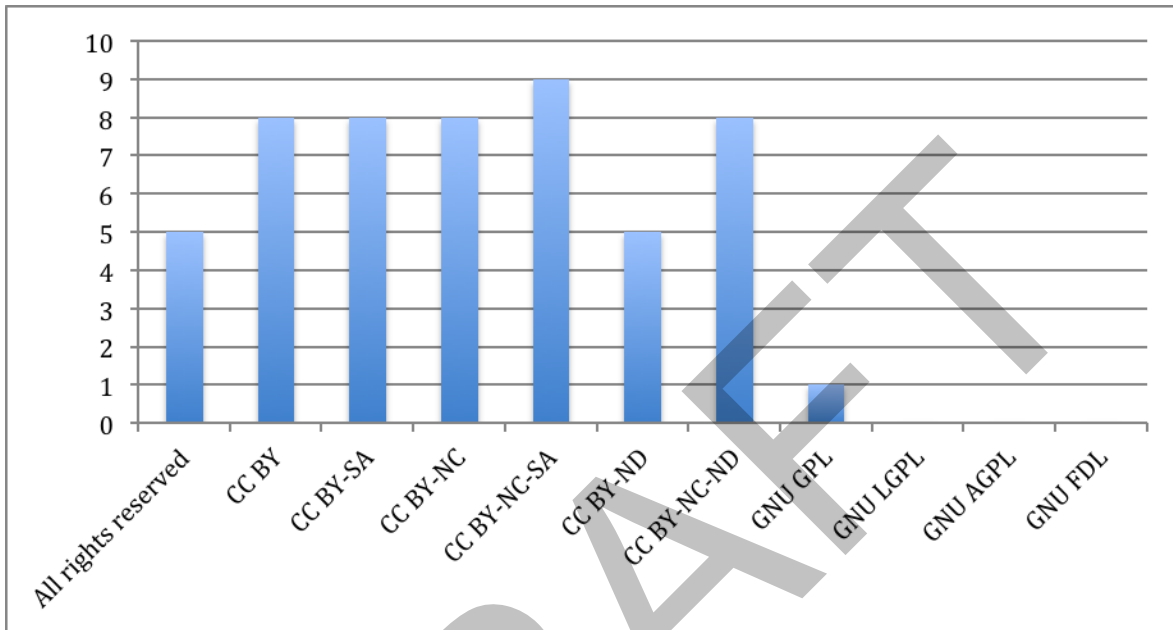


Fig. 5. Licenses allowed by Operas service providers.

³ Creative Commons Attribution (CC BY), Creative Commons Attribution + Share Alike (CC BY-SA), Creative Commons Attribution + Non-commercial (CC BY-NC), Creative Commons Attribution + Non-commercial + Share Alike (CC BY-NC-SA), Creative Commons Attribution + No Derivatives (CC BY-ND), Creative Commons Attribution + Non-commercial + No Derivatives (CC BY-NC-ND).

⁴ GNU General Public License (GNU GPL), GNU Lesser General Public License (GNU LGPL), GNU Affero General Public License (GNU AGPL), GNU Free Documentation License (GNU FDL).



5. Access policy

In this section we have asked to indicate the Access policies used and the related business models. As shown in Fig. 6, 46% of service providers use open access without a publication fee, while open access freemium is a service provided exclusively by OpenEdition.

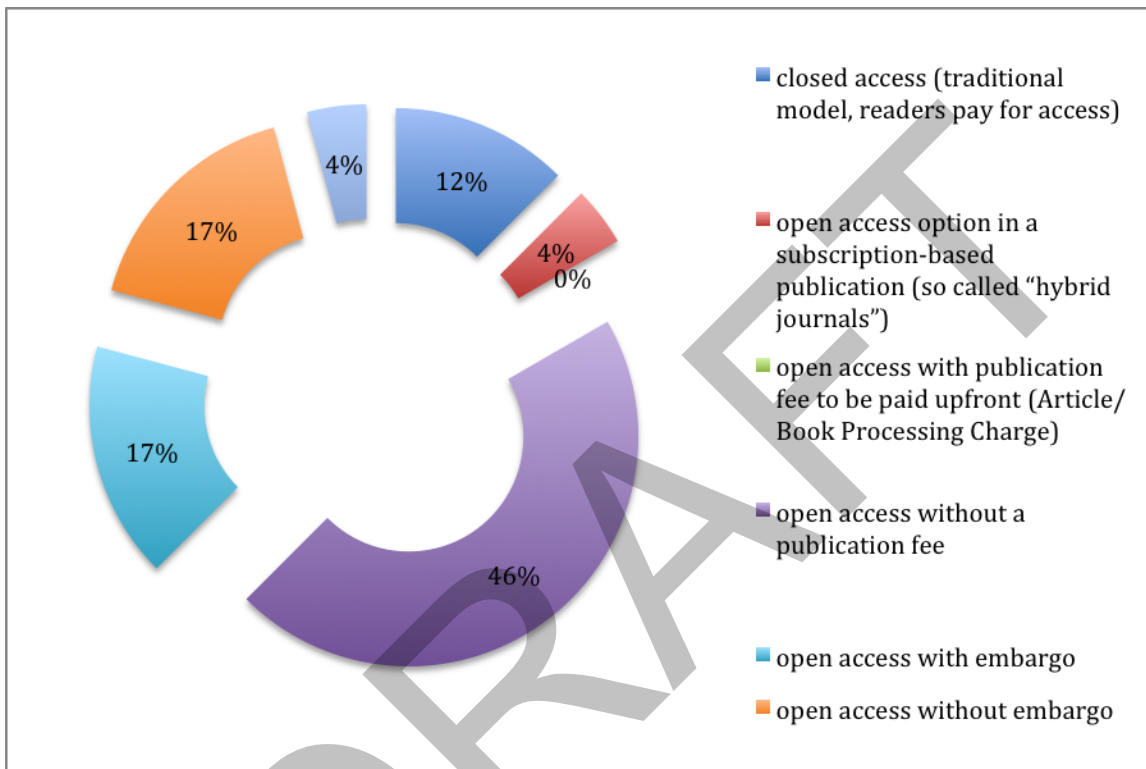


Fig. 6. Access policy and business model applied.

6. Publication formats

The survey of publication formats reveals (Fig. 7) that most service providers produce pdf, followed by HTML, EPUB format and print.

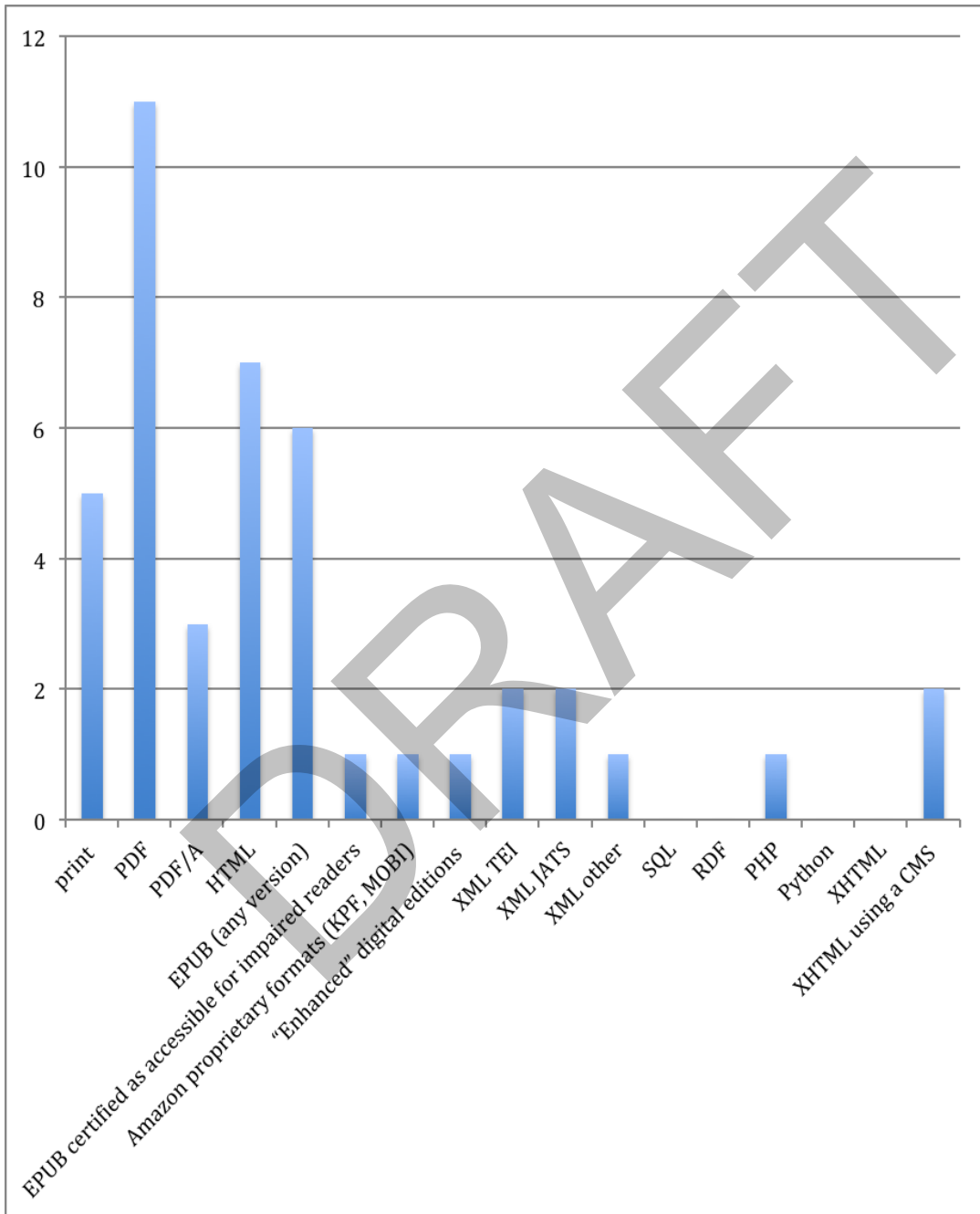


Fig. 7. Formats used for publication.

Among the formats accepted by service providers compatible with the workflow adopted by them (Fig. 8) we find in first place the Word files⁵.

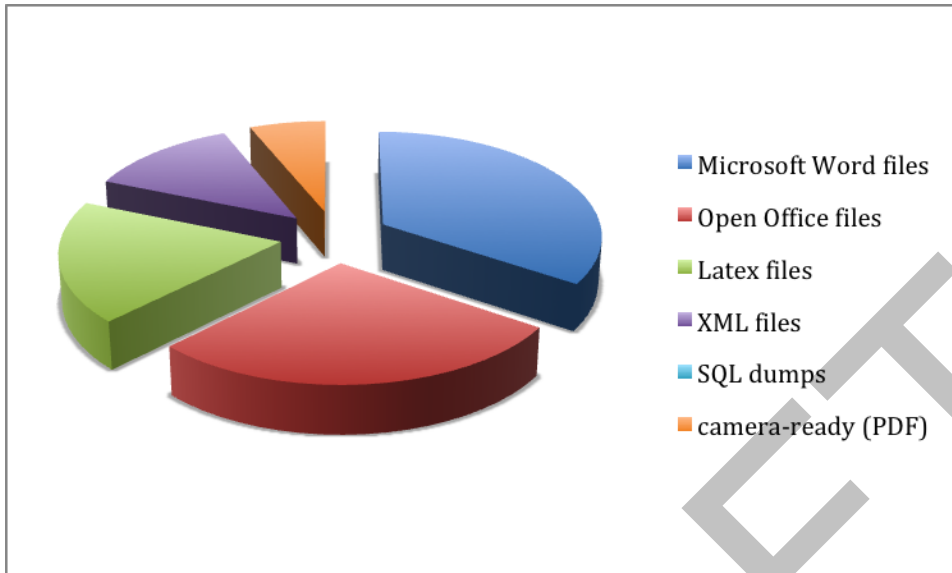


Fig. 8. Format text accepted by service providers.

⁵ In the replies to the survey, Markdown has been added.

7. Pre-publication services offered

The question "What kind of pre-publication services do you offer?" revealed the situation described in the graph (Fig. 9). Copyediting, proofreading, formatting for web impagination and bibliographical checks are the most widespread services.

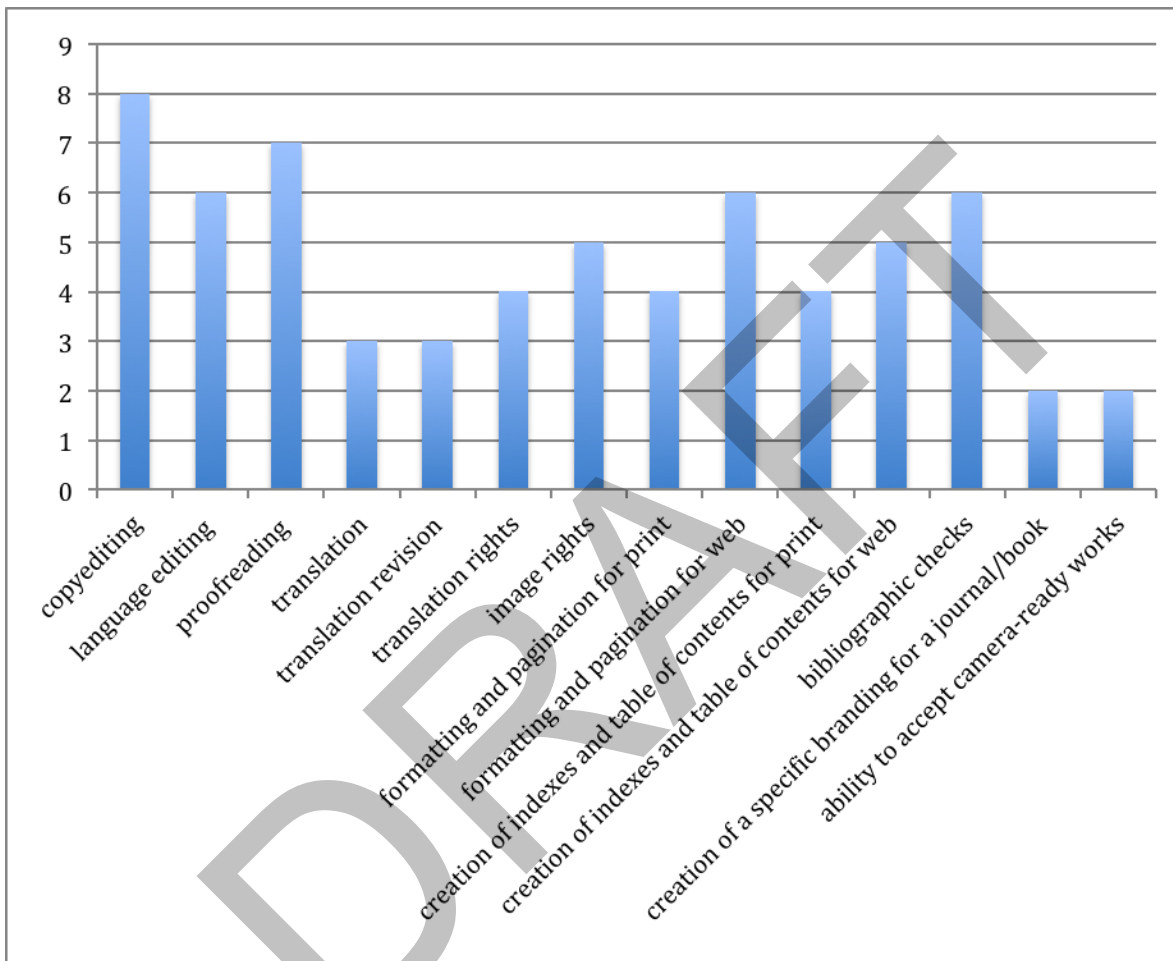


Fig. 9. Pre-publication services offered.

8. Dissemination and marketing strategies provided

The answers to the question "Which dissemination and marketing strategies do you provide?" (Fig. 10) highlight as the main way of diffusion the dissemination of metadata to commercial and non-commercial databases and catalogues⁶, immediately followed by dissemination of full-text digital version on platforms⁷.

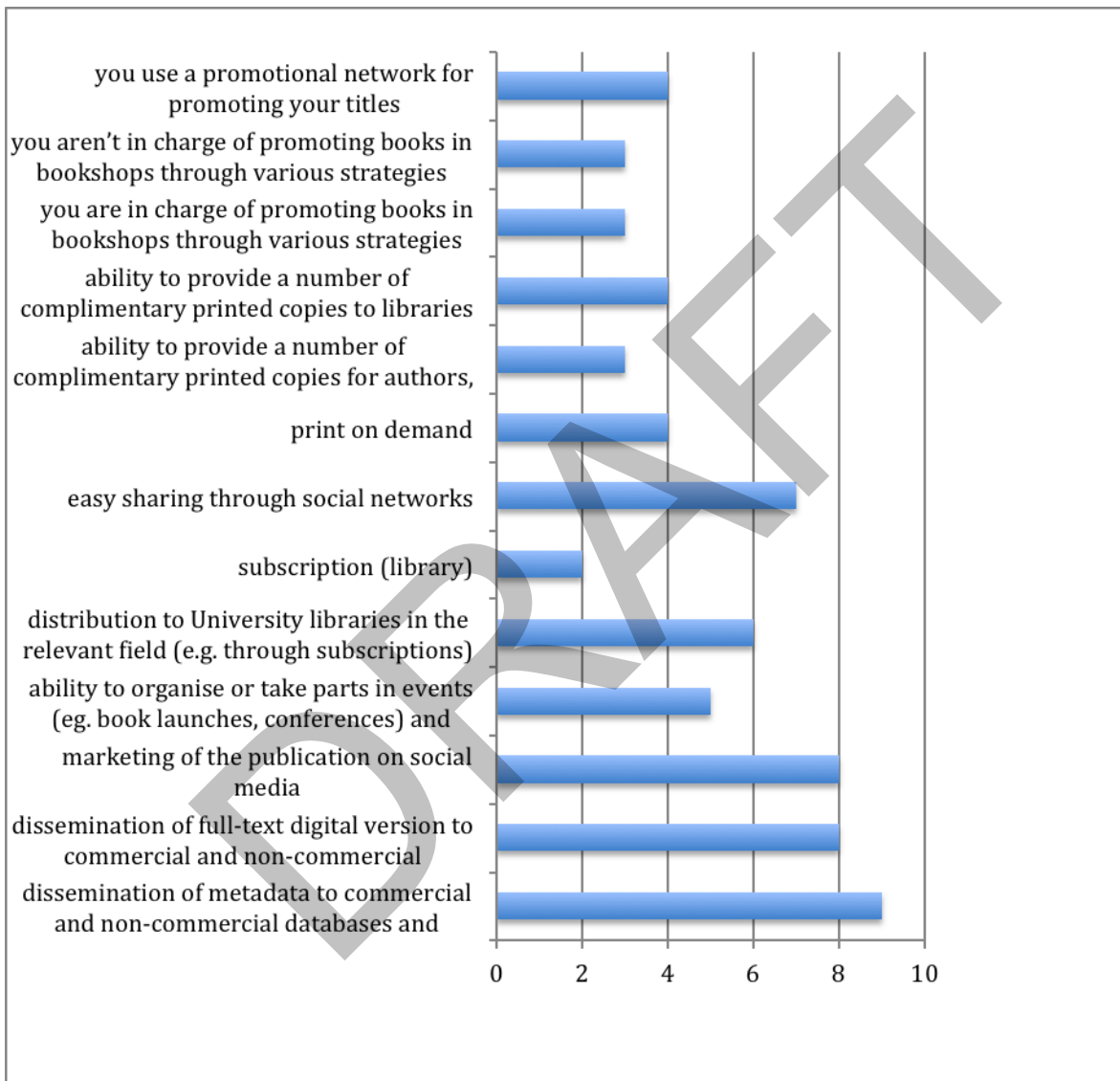


Fig. 10. Dissemination and marketing strategies.

⁶ Eg. DOAB, JISC KB, OCLC/Worldcat, ProQuest KB, Ebsco KB.

⁷ Eg. JSTOR, Ebscohost, Elib, ProQuest, OAPEN, OpenEdition.

9. Data related to readership statistics and impact measures provided

This section is dedicated to the different ways in which service providers offer data related to readership statistics, impact measures and ensure the dissemination of research through indexing in different platforms. As shown in the graph (Fig. 11), the main services made available concern the possibility of assisting researchers in the indexing process on the main platforms (33%) and providing statistics on the number of downloads (27%), followed by the possibility of providing information on the number of citations (18%).

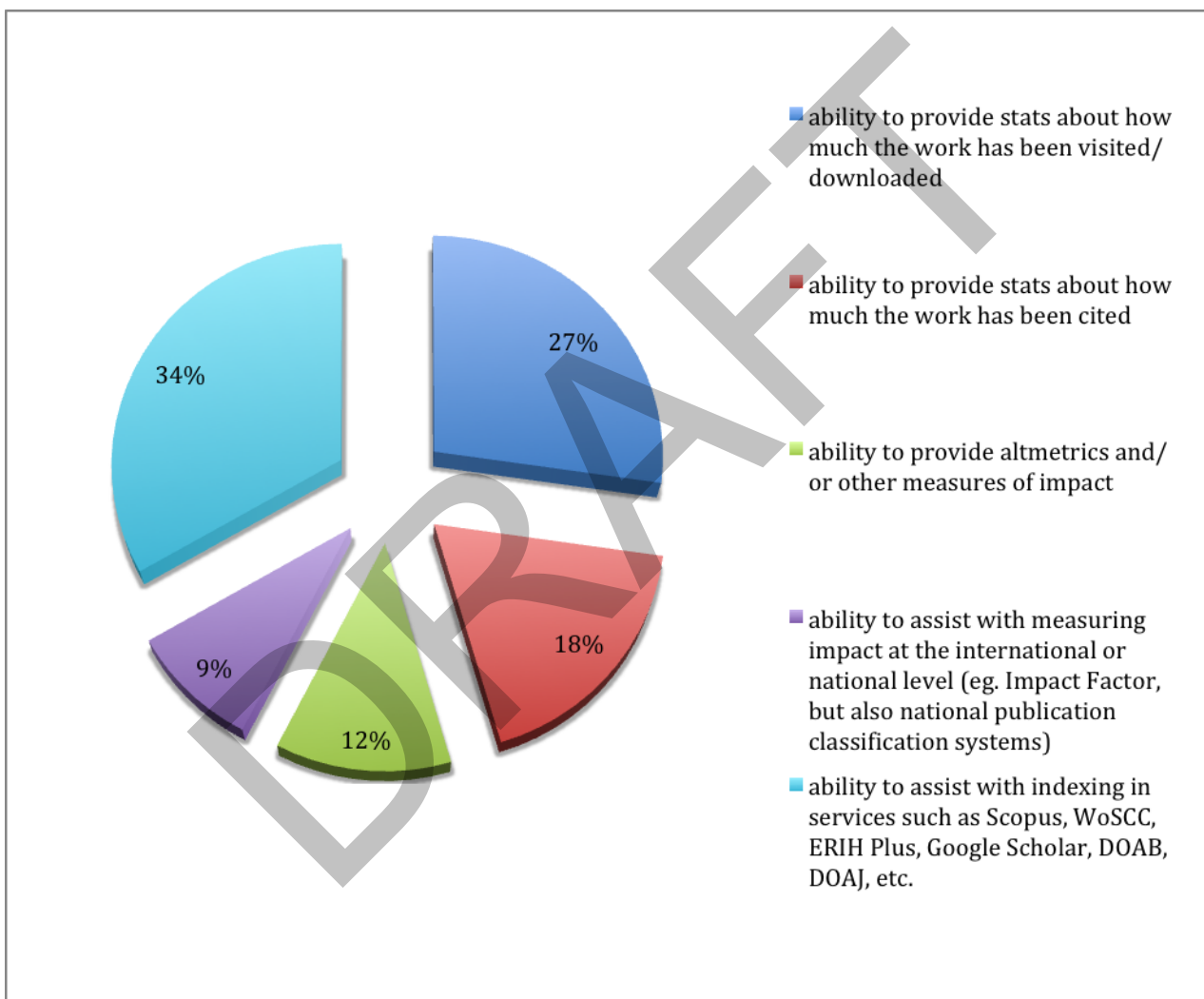


Fig. 11. Readership statistics and impact measures provided.

10. Archiving and long-term preservation strategies offered

The question is related to archiving and long-term preservation strategies offered by service providers divided into the different types shown in Fig. 12. It should be noted that not in all cases archiving is automatic but the researcher is free to archive his research independently in the different institutional repositories - which proves to be the most practiced way (38%) - even if the service provider remains available to supply eventual assistance.

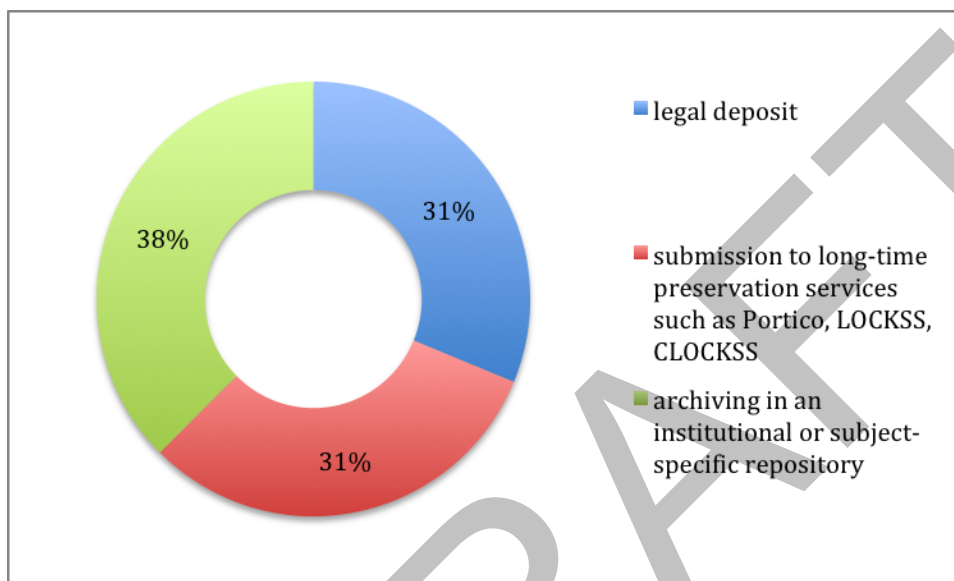


Fig. 12. Type of archiving and long-term preservation strategies allowed or offered.

11. Provide the possibility to publish academic content online

For the publication of online content we have indicated some of the main systems used (Fig. 13), the most used is OJS (47%) . The service providers also offer assistance for the use of the different systems.

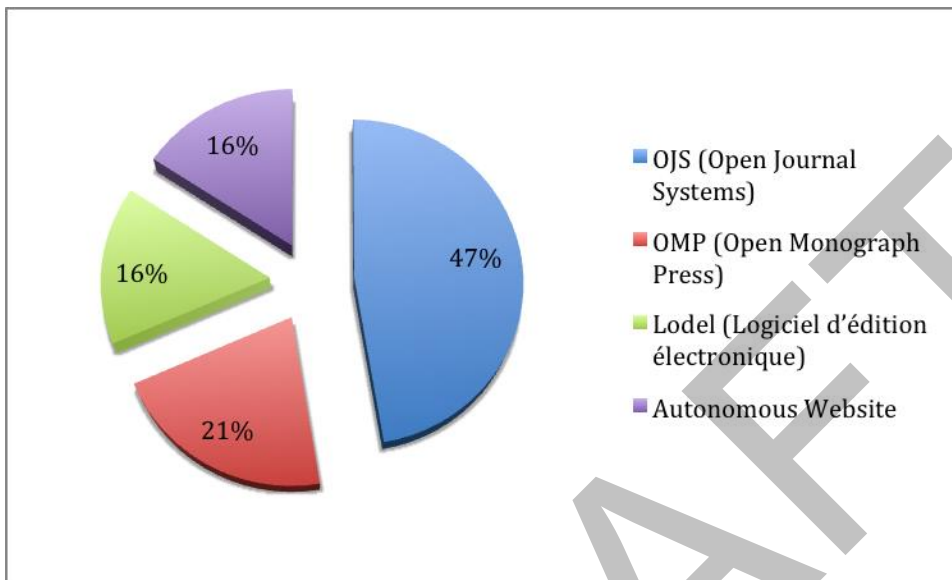


Fig. 13. System used to publish academic content online.

DRAFT

12. Standard identifiers provided

This inquiry is aimed at identifying which types of standard identifiers are associated by the different service providers with the research products (Fig. 14).

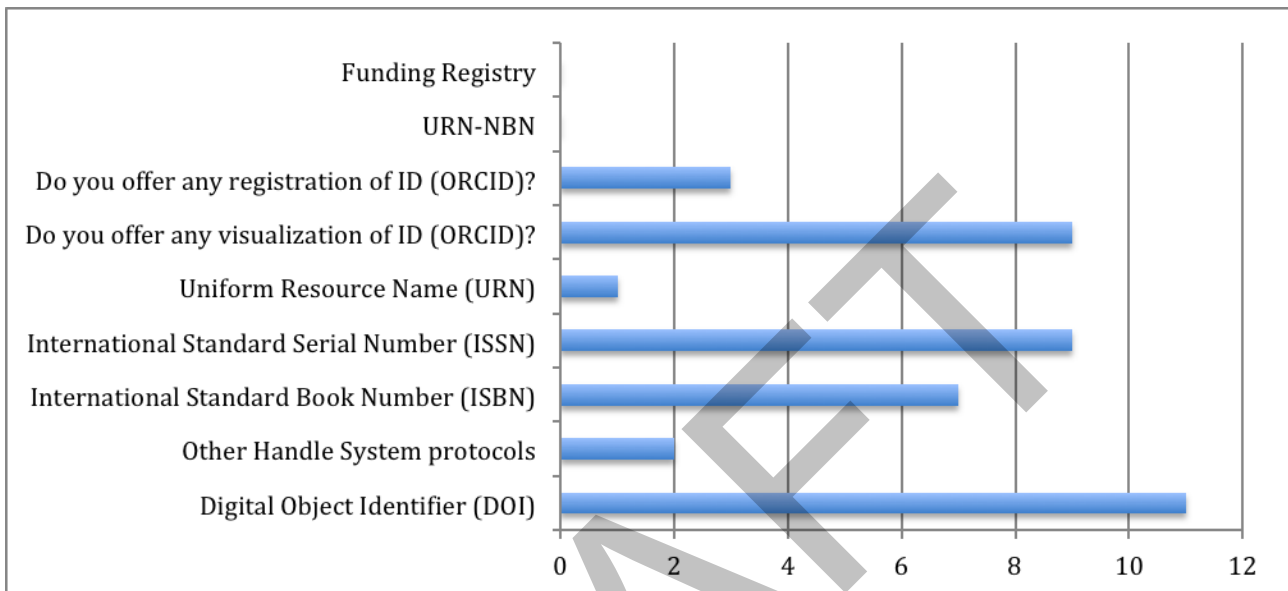


Fig. 14. Standard identifiers provided.

DRAFT

13. Post-publication services offered

Finally, we have indicated some of the services that can be provided (Fig. 15) without claiming to be exhaustive, also in this case in fact the application is accompanied by a space where you can indicate others.

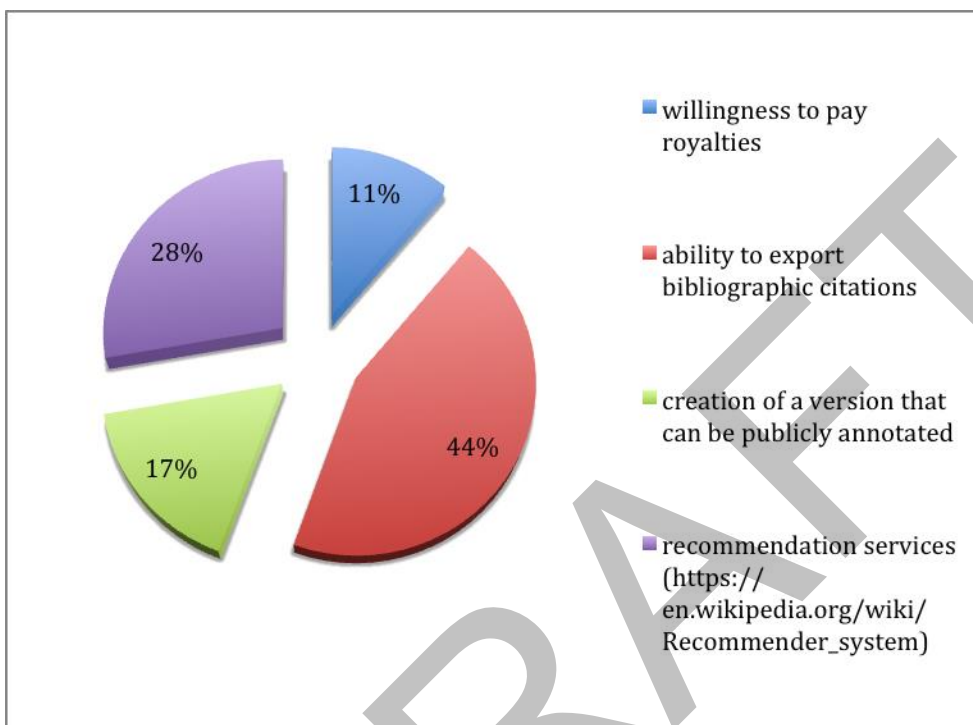


Fig. 15. Some of post-publication services offered.

D. Future developments and implementations

From the moment Operas Pathfinder is operational, members interested in participating will be able to request access credentials to the portal and fill in the questionnaire, thus entering their services independently.

We also foresee the possibility for researchers to log in in the future in order to receive a more personalized service. In addition, all requests made by researchers who do not find any answer among the matches offered on the portal in the future will be reported to all members of Operas, in the immediate future this service is not yet active but we made sure to save these requests and then report them.

IV. Questionnaire for researchers

In the context of developing Operas Pathfinder, we created a questionnaire for researchers to guide the design of the interface and expand our understanding of what a common access point to publishing services should include. The aim of the survey was never to explore the wider landscape of academic publishing in the Humanities and Social Sciences, but rather to **guide to the creation of a helpful and inobtrusive user interface**.

The questionnaire, organized in 13 groups of questions, was designed to be as easy and quick to complete as possible:

- we accepted multiple answers and made only 6 questions compulsory, to accommodate many different situations and points of view;
- we always provided an “Other” option, with the possibility of writing in a text box;
- we made sure it was easy to add comments and give additional feedback at any stage in the survey.

The first group of questions asked researchers about their career stage, subject area(s), country of residence, and language(s) used in academic writing (see “Respondents’ distribution across disciplines and languages”). The data collected confirmed the representativeness of our sample and gave us an insight on the type of content these researchers are most interested in publishing.

The remaining of the survey was organised in several groups of questions, each addressing one of these topics: (1) **peer review**, (2) content **submission**, (3) copyright and **licensing**, (4) **access** to scholarly content and funding for publications, (5) standard **identifiers**, (6) archiving and **preservation**, (7) **dissemination** and marketing, (8) measures of **impact**.

These macro-areas form the basis for Operas Pathfinder’s **Detailed Research** interface (Fig. 16), and the answers we gathered helped us establish which options and filters researchers would expect to find in it. The feedback was also crucial to identify services that are required by the research community but are not necessarily covered yet by the partners showcasing their services on the platform (see section “Analysis of responses and lessons for Operas Pathfinder”).⁸

Finally, just before concluding the survey, we asked respondents how they would use the Pathfinder, and what for. This informed the creation of an alternative search option, called **Common Scenarios** (see pages 42, 50 - Fig. 17).

⁸ The order, however, differs and is again based on feedback from researchers: throughout the survey, in fact, we asked them how important they perceived each of these areas to be.

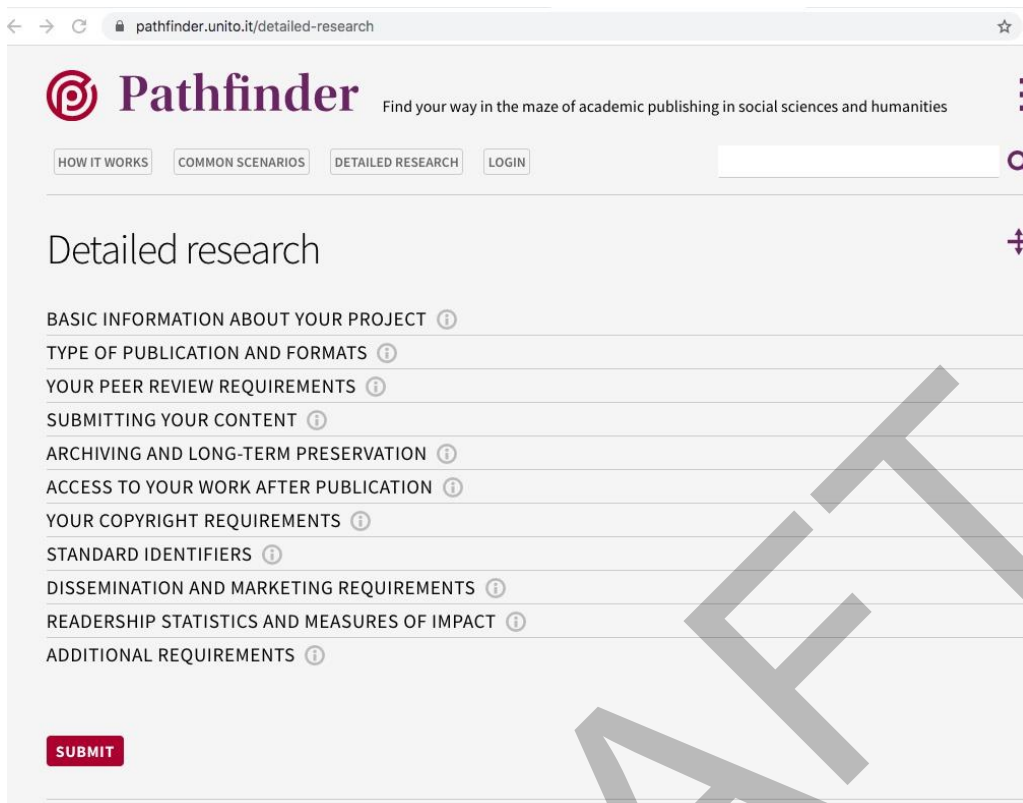


Fig. 16

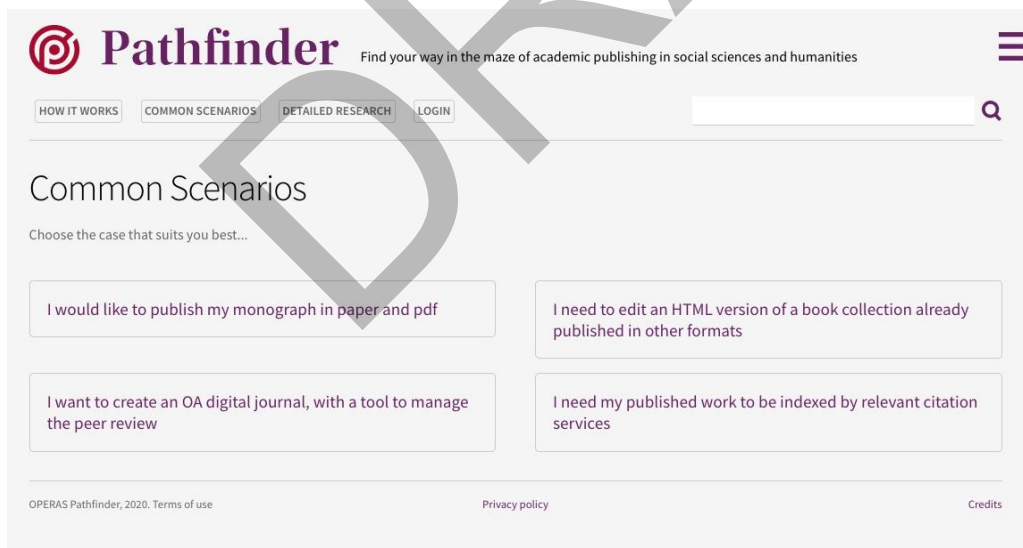


Fig. 17



The general response to the questionnaire was extremely positive and no problems were reported (see section “Who did we contact, and who responded?”). Several researchers warned us that they were not familiar with some of the terminology used, and this led us to rephrase any wording that was unclear and to create and implement a basic **glossary** on the platform. As mentioned, however, the most direct result of the survey was the creation of the Detailed Research, as we will see in more detail below.

A. Who did we contact, and who responded?

1. Selection of respondents and survey circulation

We defined our ideal pool of respondents as composed by 4 researchers based in each of the countries represented within Operas’ Core Group: Croatia, France, Germany, Greece, Italy, Netherlands, Poland, Portugal, UK⁹ (see Table I). For each, we aimed at contacting at least 2 senior researchers, 1 early-career researcher and 1 PhD student or Postdoc. We made sure to keep track of each researcher’s area of expertise, to ensure an acceptable distribution across the Humanities and Social Sciences (see paragraph 2).

We emailed all partners belonging to the Core Group and asked them if they could provide 4 contacts for their respective countries, while also inviting them to join Operas Pathfinder as service providers. We received name and email address of 32 researchers (17 women and 15 men), who were all contacted between the 4th and the 13th April.¹⁰

Of these, **26 researchers completed the survey** (81% of the total, 15 women and 11 men), while 1 researcher opted out, 4 never started the survey and 1 never completed it.

Table I: Number of people contacted and responses

	contacted	opted out	not started	not completed	completed
Croatia	4				4
France	4		1	1	2
Germany	4	1			3
Greece	4		1		3
Italy	4				4
Netherlands*	0				0
Poland	4		1		3
Portugal	4		1		3
UK	4				4
TOTAL	32	1	4	1	26

* Unfortunately, we received no names for this country.

⁹ In a follow-up, the most immediate step would be to involve researchers based in other countries, starting from those represented within the growing Operas’ network.

¹⁰ We also reached out to two Belgian researchers, whose country is not currently represented in the Core Group, after their contacts were passed on to us. We have excluded them from this count because they never completed the survey (1 opted out and 1 never started it).

In the analysis that follows we have not included incomplete responses (5 in total). In three cases, the researchers went back and completed the survey later; here, we decided to include only the most recent set of answers. In the two remaining cases, the respondents never clicked past the first group of questions (“We would like to know something about you”) and either opted out from, or never completed, the survey.

It has later emerged that one of the Greek academics we contacted is in fact based in the UK, which explains the 5 responses we recorded from the UK (see Fig. 18).¹¹

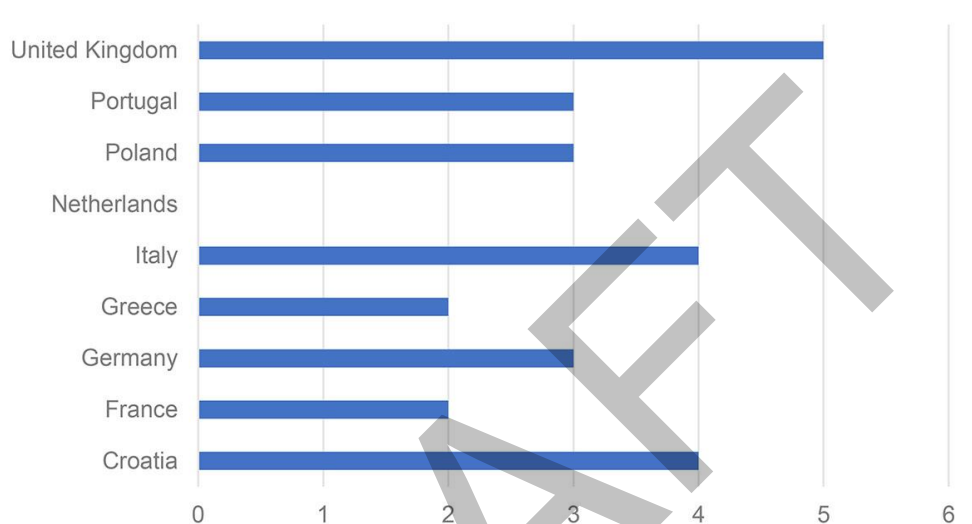


Fig. 18. Responses to question “What country are you answering from?”

2. Respondents’ distribution across disciplines and languages

In the survey, we asked researchers about their academic position (see Fig. 19). Just under half the respondents defined themselves as “tenured or permanent”, in line with the fact that half of the people contacted were senior researchers. One respondent selected “Other” and entered “assistant professor”.

¹¹ Of the researchers based in Greece, 2 completed the survey and 1 never started it.

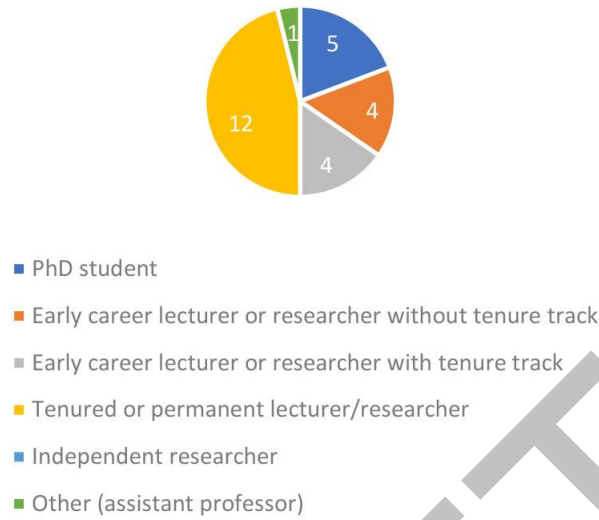


Fig. 19. Responses to question “What is your current academic position?”

Then, we asked researchers about their area of expertise and invited them to select all the answers that applied. All areas included in the list provided by MORESS project were selected, except for Law, Economics, Geography, Business admin, Architecture, Musicology, Religions, Biological Anthropology and Demography (see Fig. 20). Four respondents did not find their subject accurately described and added these under “Other”: Digital Humanities (1), Social policy (1), Communication Science (1) and Media Science (1).

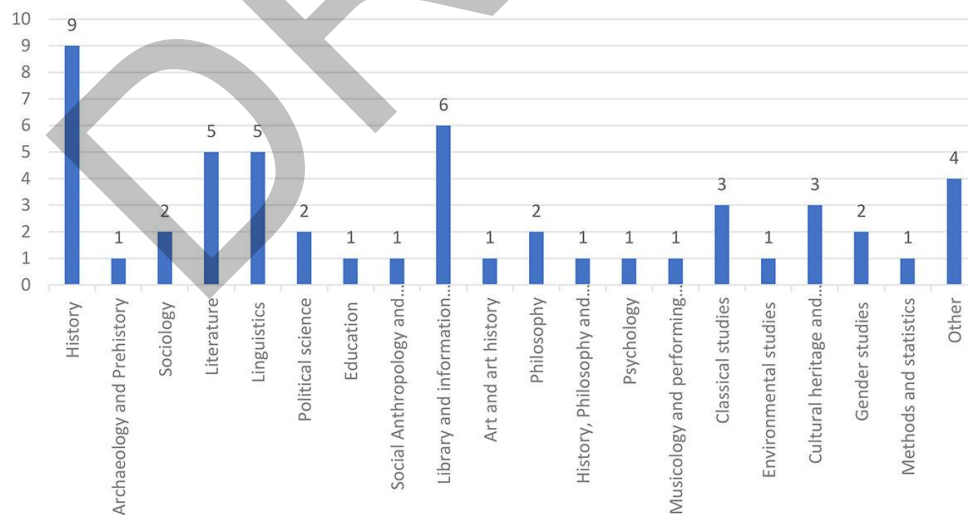


Fig. 20. Responses to question “What is your field of study?”

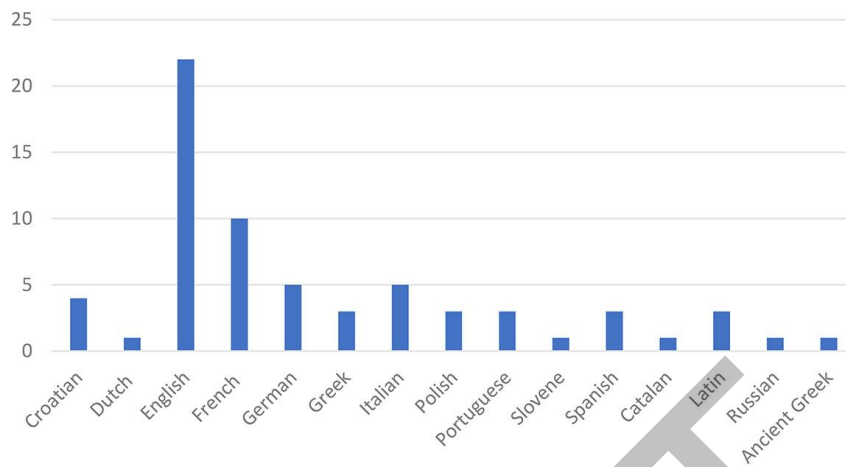


Fig. 21. Responses to question “Which languages do you mostly use when doing research, writing and publishing?”

When asked which languages they mostly use in research, writing and publishing, respondents could again select all that applied. The list of languages comprised those most widely spoken in the countries surveyed. Not surprisingly, 22 out of 26 researchers selected English, followed by French (10), German (5) and Italian (5). Importantly, the following languages were added as “Other”: Catalan (1), Russian (1), Latin (3) and Ancient Greek (1).

3. Respondents’ experience with publishing

All respondents have acted as authors, some more than 100 times, most have been peer reviewers (sometimes tens or hundreds of times) but also editors and translators.

Table II: Have you ever covered any of these roles?

Role	Number of times selected
Author	26
Peer reviewer	24
Book editor	15
Translator	12
Editor in chief of a journal	11
Book series editor	6
Founder or director of an academic press	1
Other (CDO and editorial boards)	1

From here, the survey moved from questions focused on the present or the past to questions on **plans and expectations for the future**. When asked about what types of scholarly content they were planning on publishing, 25 respondents selected “**journal article**” and 18 selected “**monograph**”; conference proceedings (15), chapters in a collective volumes (14) and book reviews (13) also scored high (see Fig. 22). The only

type of publication never selected was “mega-journal”, while the only addition under “Other” was “catalogues of archives”.

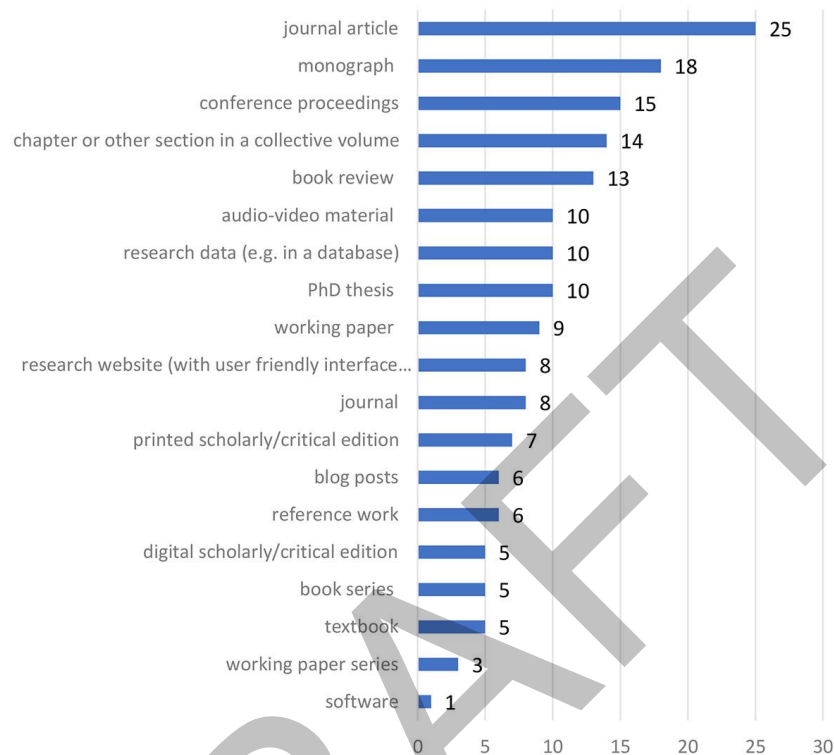


Fig. 22. Responses to question “What types of scholarly content do you plan on publishing?”

In case of more “traditional” publication types such as journal article, monograph, chapters, proceedings, etc., the preferred formats were, in order: **PDF** (26), print (20), EPUB (17), web page/XHTML (10), digital editions with embedded audio/visual material (8), other e-book proprietary formats (6), XML (6), EPUB certified as accessible for impaired readers (3).

Publishing **audio-visual materials** has been selected 10 times, and podcasts, videos, groups of images and 3D visualisations have been mentioned more than once in the comments, “alongside books and articles”. Respondents have also reported working on projects that use XML (TEI e JATS), “PHP and MySql”, “proprietary database” and “open-access software for games”.

B. Analysis of responses and lessons for Operas Pathfinder

As mentioned in the introduction, the body of the survey was organised in several groups of questions, each addressing one of these topics: (1) peer review, (2) content submission, (3) copyright and licensing, (4) access to scholarly content and funding for publications, (5) standard identifiers, (6) archiving and preservation, (7) dissemination and marketing, (8) measures of impact.

We shall now look at each group in turn and describe how the responses we gathered informed the design of Pathfinder. Please note that the term “publisher”, used a handful of times in this report, is used to mean “provider of publishing services” in the broadest possible sense.

1. Peer review

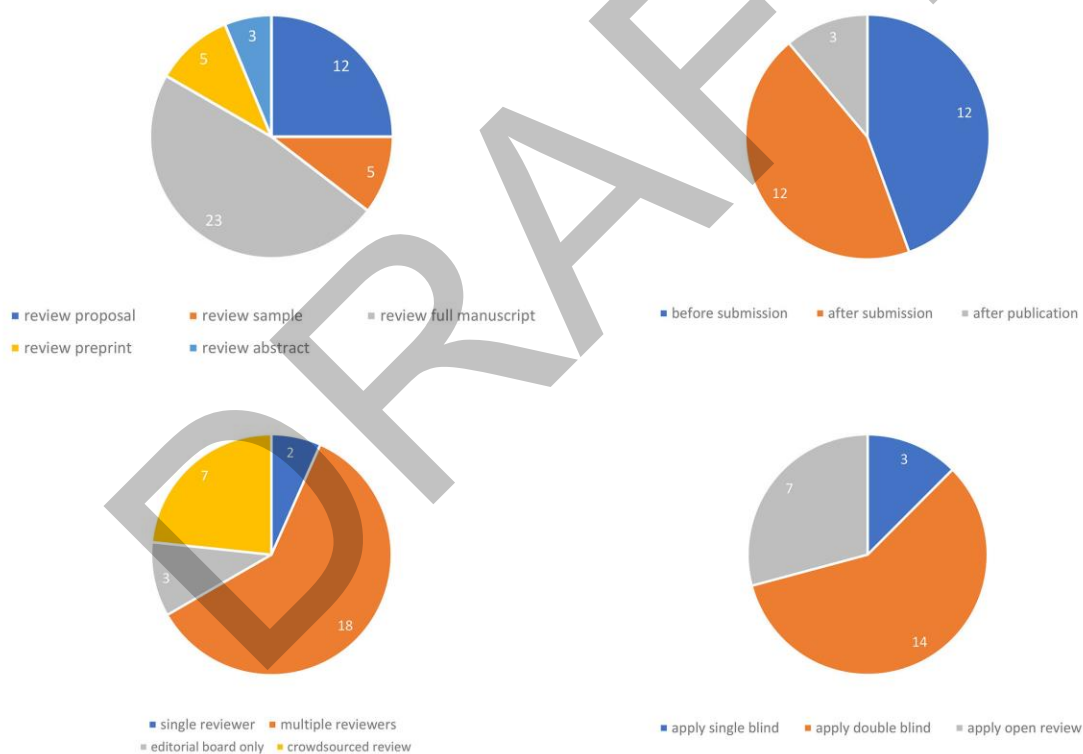


Fig. 23. Responses to question “What types of peer review do you consider suitable to your publication?”

A formal peer review organised by the publisher is considered necessary or desirable by 25 respondents. Just over half indicated they would prefer managing peer review online with tools such as Open Journal System (14) or Open Monograph Press (1). The

comments suggest that many researchers simply exchange documents via email,¹² while several do not have a preference or do not know.¹³ The answers also show that a double blind peer review of the full manuscript, carried out by multiple reviewers before or after submission is the preferred option (see Fig. 23).

These responses confirm that the categorization we adopted, based with modifications on the terminology used in Hirmeos' Work Package 4 (Certification service), is generally well understood. They also allowed us to add more options in the Detailed Research, under "Peer review requirements".

2. Content submission

When asked about submitting scholarly content for publication, researchers indicated the formats listed in Figure 24. One of the comments suggested text files (.txt) may also be relevant, which we added an option in the Detailed Research.

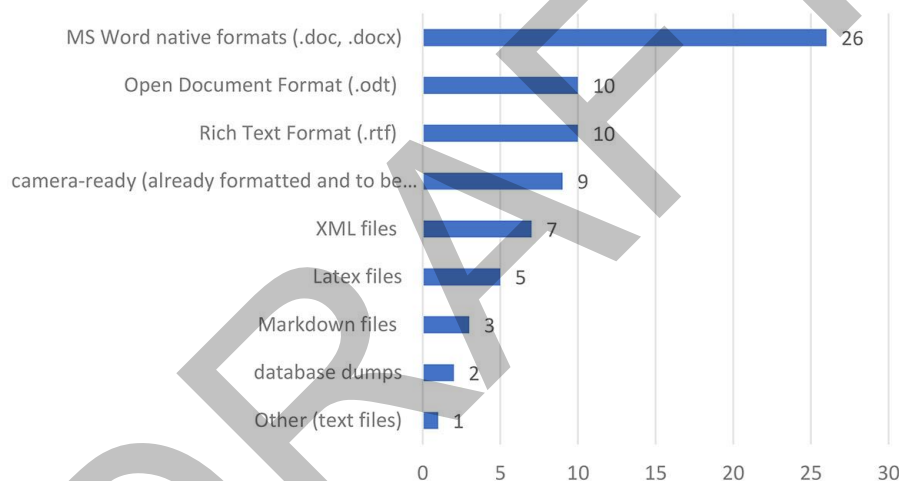


Fig. 24. Responses to question "In which formats do you expect to be able to submit your content to the publisher?"

Next, we asked researchers which services relating to editing and language review they may require from a publishing platform. Our aim here was to consolidate the list of services presented in the Detailed Research. All the answers originally included in the survey were selected at least once (see Fig. 25), while "light copyediting" and "cropping and silhouetting images" were added under "Other" (the latter was implemented in the Detailed Research as the slightly more general "image/audio/video editing and

¹² "Word documents are fine [...]"; "exchange of documents"; "e-mail". Considering these comments, we added an option "No, simply exchanging documents via email is enough" to the Detailed Research available on *Pathfinder*.

¹³ "We are far from systems, so no, because I'm not familiar with any"; "I don't have one preferred"; "I'm not familiar with these systems [...]".

optimisation”).¹⁴

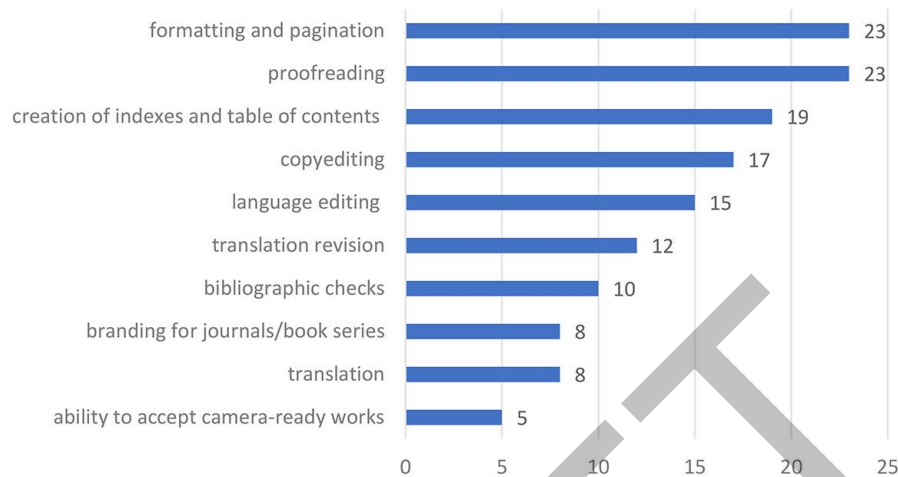


Fig. 25. Responses to question “Which of these services relating to editing and language review would you want the publisher to take care of?”

Although falling well beyond the scope of our analysis, it was interesting to read some rather conflicting points made in the comments: someone noted that “the editing process is crucial to hone a work for publishing”, while another respondent defined it “nefarious”.

3. Copyright and licensing

When asked about the sort of licenses they plan on publishing under, researchers mostly selected “All right reserved” (13), closely followed by “CC BY” (11). Given that the two most popular answers are at opposite ends of the openness spectrum, we may conclude that this is a rather polarising matter. Some comments certainly seem to confirm that: one respondent, for example, states that they “definitely incline toward licenses including a non-commercial and non-derivative clause”, while another just wants “free access for everyone”.

What emerges with prominence from the comments, however, is that many researchers ultimately do not know the difference between these licenses¹⁵ and, in some cases, do not

¹⁴ Later in the survey, one respondent said that in their opinion “*Pathfinder* should include information about all other costs publisher requires for services it defines as ‘complementary’ (e.g. if copy-editing, proof-reading, indexing etc. is organised by the publisher for a fee)”. While we have considered this possibility, we have opted not to include any prices on our interface at this stage, leaving the economic aspects to be discussed directly with the service provider(s).

¹⁵ Note that while Fig. 26 uses abbreviations to save space, in the survey we provided the complete name of each license for clarity. Nonetheless, we received this feedback: “A line of two of explanation of what particular format is would be perhaps useful to cater to all levels of competence”; “I don’t know enough about the different copyright policies, and I assume that others don’t either, so displaying that information would be

feel like the choice rests in their hands.¹⁶

As far as *Operas Pathfinder* is concerned, we concluded that (i) the list of possible licenses provided within the Detailed Research is satisfactory, at least at this stage, and that (ii) a basic explanation is needed, including links to the official license providers' websites.

More generally, however, the responses seem to indicate that copyright is one of the most confusing and least known aspects relating to scholarly publishing, one in respect to which many researchers feel either unprepared or not in charge.

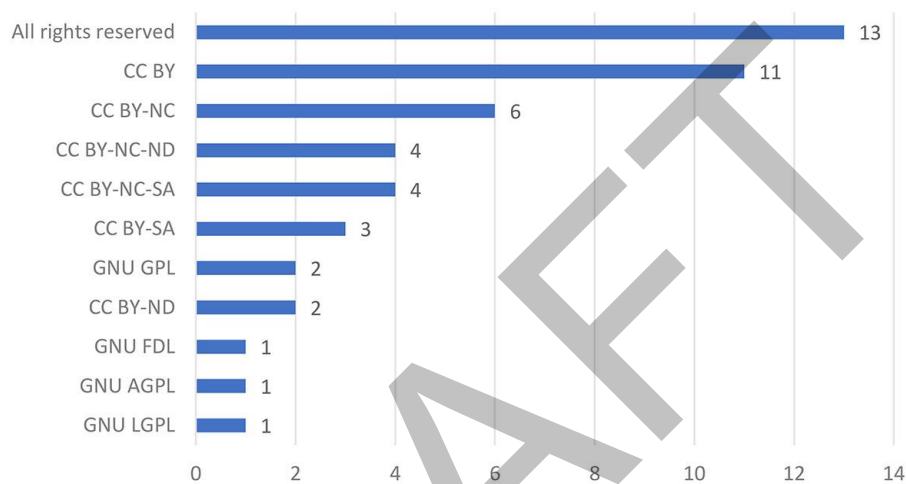


Fig. 26. Responses to question “Under which type of license do you plan on publishing?”.

4. Access to scholarly content

The responses to the question “Under which of these models would you publish?” show us that, contrary to what the data regarding licenses may perhaps suggest, researchers in our sample are not averse to publishing in open access. When asked under which model they would publish (with reference to the accessibility of the content after publication and also, partly, to the economic model to achieve it), the most popular answer was “open access without a publication fee” (22) followed by “open access without embargo” (13). “Open access with APC/BPC” is indicated as an option by 7 respondents, as are hybrid journals, while closed access was selected by 6.

One respondent commented that “The [...] question is badly put. [...] Most scholars will act pragmatically in choosing the publishing model, comparing available options. [...] So the question should be either: are you familiar with these models, or IF YOU HAD A CHOICE,

really useful”; “I ticked the box ‘all rights reserved’, because it's the only clause I know”; “I don't know the difference between so many types of licenses”.

¹⁶ “I don't really understand what all of the mentioned means, plus, as an editor and an author, I'm not sure we have so much power to choose any of these: types of license are simply pre-arranged”; “the licenses are chosen by the funders ... I do not choose the conditions of access to the review that I run”.



which publishing model would you prefer." This was echoed by another, who noted that researchers do not always get to choose or are aware of the ins and outs, and by another. who said they would be "willing to publish in any of these formats" and that "to some degree, the choice will be dictated by funders".

As a consequence, we re-phrased this section within Operas Pathfinder's Detailed Research to refer more clearly to the project's internal and external requirements (such as from the funding body) rather than to the researcher's own desires: "How accessible do you need the final publication to be to readers?". As a side note, however, we hope that this platform, by providing an overview of several service providers across Europe and making it easier to choose the best fit for each project, will help researchers feel at least a little more in control of their publishing choices.

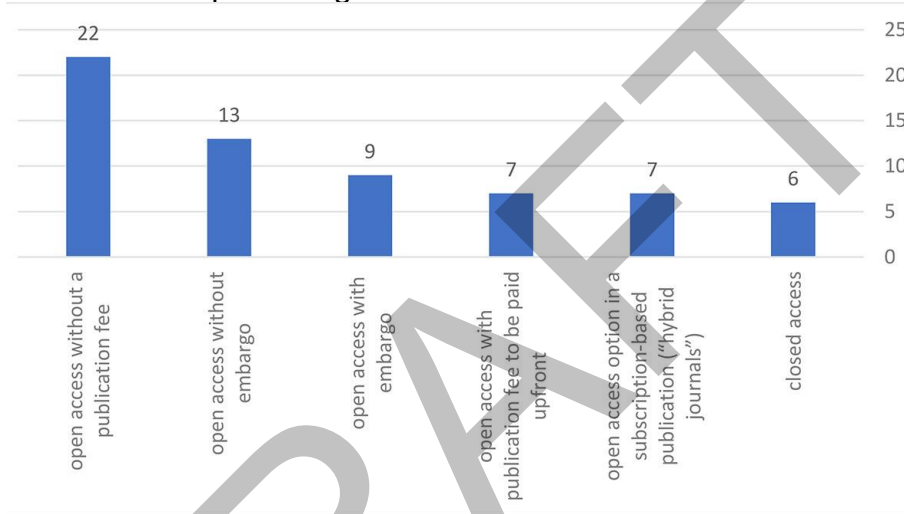


Fig. 27. Responses to question "Under which of these models would you publish?"

We also asked researchers some questions about publication funds, if and where they thought they would be able to get some for their next project. This aspect is intricately linked to the access problem¹⁷ and these questions were aimed at helping us understand more and gather feedback from researchers. For the time being, however, we have resolved to exclude any filters relating to the availability of institutional or external funding from our Detailed Research. This aspect, which is often both delicate and intricate, should, at this stage, be discussed directly between perspective authors and selected service provider(s).¹⁸

In any case, by looking at the answers emerges that most respondents are likely to get hold of enough (3) or partial funding (11) from their institution, or of enough (2) or partial funding (11) from an external body. Either way, among the conditions imposed by funding

¹⁷ As one respondent noted, "On fees, this would depend on how expensive they were, and/or if I could source support from an institution or in the form of a grant".

¹⁸ As noted by one of the researchers in our sample, "there should be always contracts between author and publisher (a contract which is mediated according to the specific needs, not necessarily a fixed one)".

bodies, open access is mentioned the most.¹⁹ At the same time, 9 researchers said they would not get any institutional funds, and 10 that they would not get any external funds.

5. Standard identifiers

When asked about which identifiers they plan to use in future publications, researchers gave the responses shown in Figure 28. The Digital Object Identifier is the most popular (selected 24 times), followed by ORCID (20), ISBN (20), ISSN (17). Another standard identifier mentioned under “Other” is the Portuguese CIÊNCIA ID. Some respondents, on the other hand, suggested there is limited knowledge and use of these standards within the Humanities.²⁰

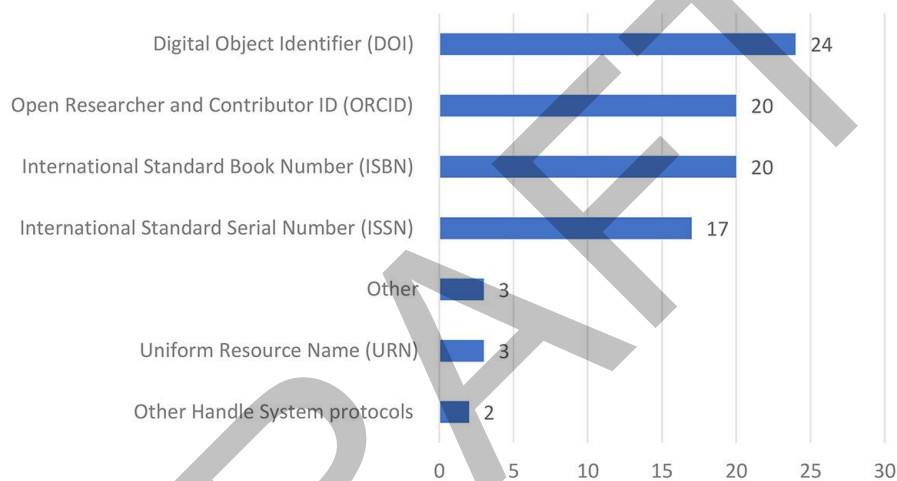


Fig. 28. Responses to question “Which of these identifiers do you plan to use?”

The collected data confirmed that all the identifiers we had individuated were in fact relevant to at least one researcher in the sample and allowed us to add one more option to the Pathfinder Detailed Research.

¹⁹ “It would have to be OA”; “That the work be of a standard to be included in [assessment] exercises, and, in that case, that it be open access”; “licensing”; “choice of ‘renown publisher’ (from a list published by the ministry of science), open access and acknowledgement of funding source”.

²⁰ “I absolutely don’t know what all to the mentioned means”; “Dans certains domaines scientifiques, en particulier les humanités, ces ID sont presque inconnus”; “I don’t understand this enough to know how important it would be in Pathfinder. I haven’t heard of URNs and don’t understand what ‘Other Handle System protocols’ might be”.

6. Archiving and preservation

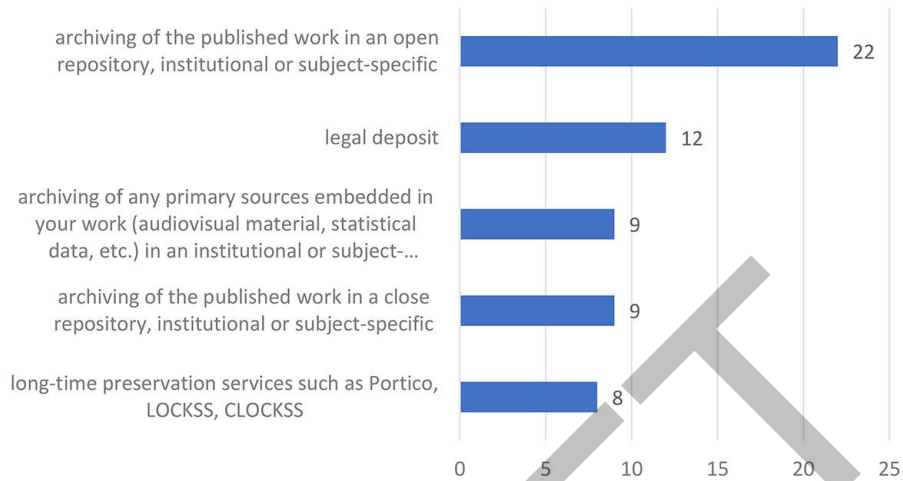


Fig. 29. Responses to question “Which of these preservation strategies would you want/need to implement?”

When asked about long-term preservation strategies, respondents selected all available options at least once. No other strategy was suggested in the comments or added using “Other”; as such, we did not make any addition to our initial model. Archiving the final published work in an institutional or subject-specific repository is by far the preferred option, with 22 respondents selecting “open repository” and 9 selecting “close”.²¹

7. Dissemination and marketing

The answers to the question “Which dissemination and marketing strategies do you want/need the publisher to implement in relation to your work?” are shown in Table III. The addition made under “Other”, of radio programs and book festivals, is in our view already included under “organise and take part in events”; we have decided to clarify, and to split the entry in two on the Operas Pathfinder Detailed Research interface.

²¹ Here, too, 2 respondents said they “don’t know enough [...] to be able to make an informed choice” and are “not familiar” with these preservation strategies. One isolated comment read: “I am not sure publishers should be in the business of long-term preservation (other than making the publication accessible for that purpose). It is the role of scholars and academic institutions”.

Table III: Which dissemination and marketing strategies?

Role	Times selected
disseminate full-text digital version to commercial and non-commercial platforms	22
distribute to University libraries in the relevant field (e.g. through subscriptions)	20
disseminate metadata to commercial and non-commercial databases and catalogues	19
provide complimentary printed copies to libraries	17
easy sharing through social networks	17
market the publication on social media	16
provide complimentary printed copies for authors, reviewers, etc.	15
have an existing network of contacts for the promotion of published works	15
organise or take parts in events (e.g. book launches, conferences) and provide marketing materials (e.g. leaflets)	13
provide complimentary printed copies to bookshops	12
Other	1

The most popular is “disseminate full-text digital version to commercial and non-commercial platforms” (22). This indicates that circulating scholarly works as widely as possible is seen as an asset, which contrasts in some ways with the more “traditional” views on copyright and licensing (see section 3, above). Finally, a couple of comments underline how this aspect is generally not well understood, which can sometimes create difficulties.²²

8. Readership statistics and measures of impact

When asked which statistics and impact measures relating to their work they would be interested in, researchers showed a generally high interest towards being provided usage metrics, especially those concerning accesses/downloads (23) and citations (20). Unsurprisingly, indexes and impact measures were also marked as important, while no other metrics were mentioned in the replies. This confirms that our categorisation makes sense to our sample of researchers and is, at least for now, sufficiently complete.

²² “Les conditions de distribution par les plateformes et els éditeurs sont extrêmement mal connues des chercheurs et des étudiants, ce qui génère des incompréhensions en série.”; “I don't know how to answer the pathfinder question, as I can't quite picture it”.

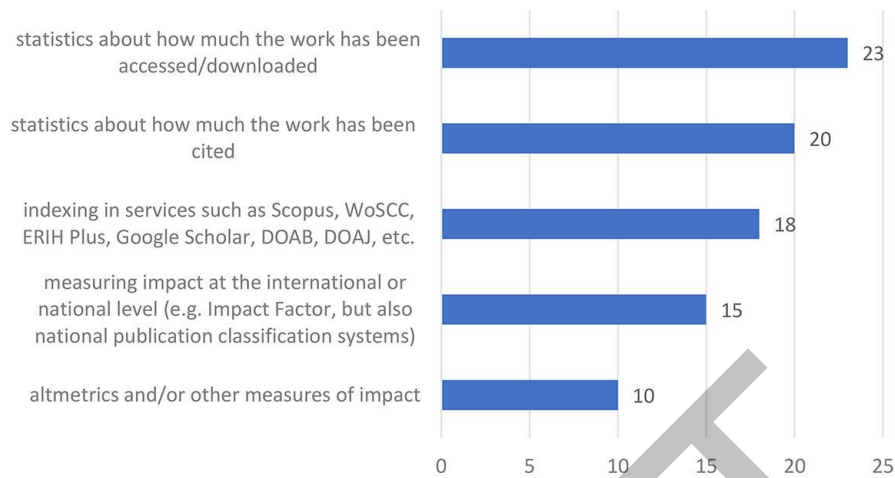


Fig. 30. Responses to question “Which statistics and impact measures relating to your work would you be interested in?”

The comments to this section, interestingly, suggest that metrics may be perceived as unfair (readership figures and measures of impact can be “depressing” in niche fields or “close to zero” at the beginning of one’s academic career), or even as “intellectually inadmissible”.²³

9. Additional services and functionalities

Finally, we inquired about what we called “additional” services and functionalities potentially required for a project. These are heterogeneous and range from the “possibility to export bibliographic citations” (valuable to 18 respondents) to the “creation of a publicly annotated version”, selected by 13 (see Figure 31). Another respondent wrote “open review/possibility to interact with readers”, which we added to the number of those who had selected public annotation.²⁴

Another comment, although referring exclusively to monographs, mentioned a desire of transparency on the number of copies being sold by the publishers and prompted us to add this possible measure to the “Readership statistics and measures of impact” section of the Detailed Research.

²³ “A titre personnel, je trouve le poids de la bibliométrie inadmissible intellectuellement. Mais je vois son importance pour les institutions, et informer les communautés sur ce point me semble de plus en plus important”; “These figures are always so depressing in my field”; “As a ‘junior’ researcher publishing in french language, my impact factor is close to zero [...]”

²⁴ In one of the comments, public annotation is heavily criticized because, in the respondent’s view, risks giving rise to abuse.

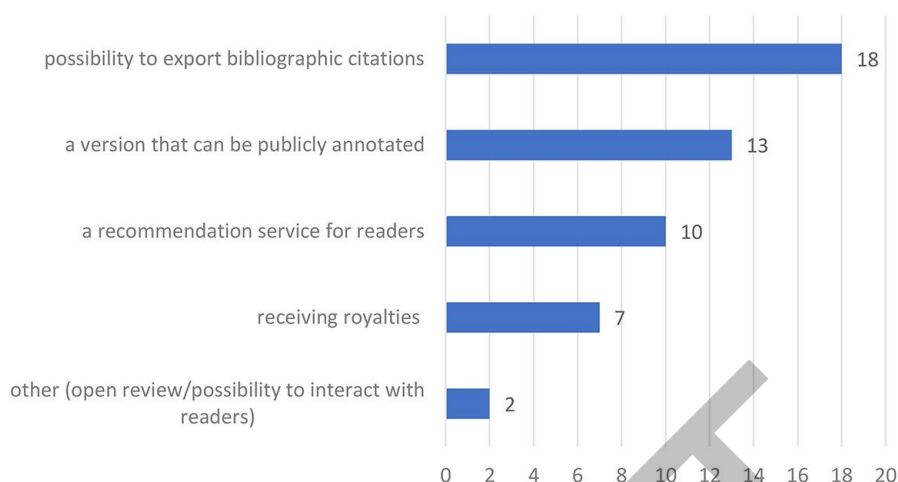


Fig. 31. Responses to question “Which of these would be of interest to you and your scholarly project?”

10. What would you use the Operas Pathfinder for?

The final question in the survey asked respondents if and how they would most likely use the Pathfinder. The answers are shown in the table below.

Table IV: What would you use the Pathfinder for?

Answer	Count	Percentage
I am writing an academic work and I want to know how I can fund its publication	15	57.69%
I am looking for a publisher for the monograph I have written/I am writing	13	50.00%
I want to make my academic work immediately available to the public (self-publish)	13	50.00%
I am looking for a journal/publisher for the article I have written/I am writing	12	46.15%
I need my published work to be indexed by relevant citation services (e.g. for promotion/career advancement)	12	46.15%
I have made my work available online and I need to assign a ISBN&DOI to it	11	42.31%
I want to establish a peer-review process (e.g. in organising a conference)	9	34.62%
I want to publish the proceedings of a conference	9	34.62%
I want to write an academic work and I want to know about available (collaborative) authoring tools	8	30.77%
I have a manuscript ready and I need copyediting and/or translation services	7	26.92%
I want to become a reviewer in my field	6	23.08%
I want to make my published text available for online annotation	6	23.08%
I am the editor in chief of a journal, and I want to disseminate it open access	5	19.23%

I want to flip a journal from subscription-based to open access	5	19.23%
I want to establish a new journal in my field	4	15.38%
I am the editor in chief of a journal, and I want to disseminate it online	3	11.54%
I want to establish a new book series	3	11.54%
I am the editor of a book series and I want to disseminate it open access	3	11.54%
I am looking for a new press to take on the journal I am the editor of	2	7.69%
I am the editor of a book series and I want to disseminate it online	2	7.69%
I want to establish a new academic press	2	7.69%
Other	2	7.69%
I am the editor in chief of a new journal, and I am looking for a publisher	0	0.00%
I am the editor of a new book series and I am looking for a publisher	0	0.00%
I am looking for a new press to take on the book series I am the editor of	0	0.00%

Among the most popular we find “looking for a publisher for the monograph/article I have written/I am writing”. The most selected answer, “I am writing an academic work and I want to know how I can fund its publication”, opened up a fruitful discussion on the aims and limits of the tool we are building. After careful consideration, we concluded that Operas Pathfinder should not address funding issues directly, as this falls beyond the scope of this project (see also points made in section 4, “Access to scholarly content”). The fact that this service would be highly valued by researchers is nonetheless a useful piece of information, which should guide future developments of this tools, or of others that may be developed in the future.

Finally, there are three additional uses that we had not considered but were added by respondents under “Other”:

1. “I want my University to establish a new academic press or to make an existing press its own academic university press”
2. “I am an editor and I am looking for reviewers”
3. “I want to be credited for academic outputs other than monograph/article (e.g. database)”

This question, and relative answers, have not found any direct application within the Pathfinder’s Detailed Research. However, we have used these data to inform the creation of the what we have called **Common Scenarios**, a query function we have finally integrated in an experimental version selecting four sample scenarios (see page 50). This is meant to be an alternative search interface, intended for users who do not want or need to use the many filters offered in the Detailed Research. We envisage that a number of users, in fact, will have fairly “straightforward” needs (such as “I am looking for a publisher for the monograph I am writing”), with very few specific constraints in terms of format, type of access, archiving, and so on.

11. Final observations and respondents’ general comments

Throughout the questionnaire, we asked researchers how important they thought it would be for Operas Pathfinder to display information on the different aspects covered in the survey. We asked to select a number from 1 to 5, with 1 = “not at all important” and 5 = “extremely important”. We received a good number of responses: around 20 researchers

cast their vote each time (18-22).

Researchers were asked: “Imagine using *Pathfinder* to look for a publishing venue: how important is it for this tool to display information on ...?”. All areas were considered important and were awarded an average score between 4 and 4.5.²⁵ In order of importance:

1. archiving and long-term preservation strategies of service providers
2. their policy regarding access
3. service providers’ copyright policies / use of standard identifiers (scored the same)
4. their dissemination and marketing strategies
5. how they measure the readership and impact of the works they publish

As mentioned in the introduction, the different section in the Detailed Research have partly been ordered according to these responses.

Finally, we asked researchers if they had any additional, more general, feedback to give us. We received these two responses:

“Quand on veut publier un article, un livre, ou même créer une collection, en général on connaît les revues et les éditeurs de son domaine scientifique, et on sait où on veut / doit publier. A mon avis, c’est un faux problème. En revanche, on connaît mal les procédures et les possibilités liées aux formes nouvelles de publication, et là-dessus un service ne peut être que très utile. Mais encore une fois, on ne choisit pas toujours [...]”.

“More attention could be paid into how academic outputs other than monographs/articles (e.g. extended online publications, websites, databases etc) can be integrated into academic evaluation, what ‘publishing’ means in this context, how should this type of work be submitted to peer review etc. Seems that the survey is mostly addressing scenarios of digital publication and dissemination of standard scholarly outputs”.

We do hope that providing a tool to choose between different service providers and different publication practices will help researchers feel more in control of their choices in this matter and less constrained by established routes and practices. On the other hand, these comments remind us that we are falling short of going beyond “standard” academic outputs, such as articles or monographs, to also include newer, but by now well established, digital publication scenarios. This is another limitation of this project that should be addressed in any future developments.

²⁵ We are not including here the answers to the question “How important is it for this tool to display information on how publishing costs are covered?”. As explained earlier, we have decided not to cover this aspect in the current version of *Pathfinder*. It did, however, score the highest and this is an aspect that should be taken into account in any further development.

V. The IT path to Pathfinder

A. The process

The developing of the web application has been a participative project where stances of openness and co-construction characterized its procedural process.

The first issue was how we could create the research form by collecting data and the services offered by the providers. Then, we needed to construct a dynamic structure which could be already used while the data collection was in process. Another question regarded the fact that, at the start, we did not know which services the host could have provided. Last but not least, we knew for sure that we wanted an open source and versatile system, which could be further and readily implemented in different hosts. For all of the above reasons, we chose to develop a dedicated web application in a standard PHP + Javascript + MySQL/MariaDB.

Since LimeSurvey works with MySQL, to collect the data we opted for that solution on an instance hosted by the National Documentation Centre (EKT <http://www.ekt.gr/en>) affiliated to Operas. We made two separate surveys, one for the researchers and one for the service provider, and we started using a copy of the LimeSurvey database to develop the web application. Both the surveys in construction and, later, the data collected influenced the development of the web application itself. The participative process was therefore enacted in this phase too, as, with their answers, the researchers and the service providers contributed to customizing the developing of the web application.

The path which led to the participative construction of the web application also inspired the name 'Pathfinder' and the logo.

When the surveys were completed, we did not need to share data with LimeSurvey any longer, and thus we transformed the database into the present structure, implementing and optimizing it for further data managing.

The next step was to match the search requirements with the services offered by the providers. Then, the analysis of the results of both surveys allowed us to optimize the search also by envisaging some Common Scenarios.

Finally, to allow further providers to add their services, and the ones of the surveys to manage their data, we created a system of user management with the possibility to authenticate through a local user on MySQL, or by EGI Single Sign On system (<https://sso.egi.eu/admin/>; EGI is one of the participants of T4.1).

B. Hosting

The tool prototype has been hosted on a Linux virtual server provided by UNITO (Università di Torino), T4.1 leader partner, free of charge for the moment. The in kind cost for this service was quantified in 3.500 euros/year.

On the server we installed Apache webserver, php support and MySQL database used for the web application.

Access to upgrade code and data is via VPN or web interface directly from public address <https://pathfinder.unito.it/>

The same setting is reproducible in a Docker container whose settings are shared with the code on GitHub.

Below are some technical informations about the dedicated server (size of the current database Pathfinder: 0.41323090 MB).

Static hostname: sys-pubwiz-srv1.ateneo.unito.it

Operating System: CentOS Linux 8 (Core)

CPE OS Name: cpe:/o:centos:centos:8

Kernel: Linux 4.18.0-147.5.1.el8_1.x86_64

Server version: Apache/2.4.37 (centos)

CPU op-mode(s): 32-bit, 64-bit

CPU MHz: 2195.875

MemTotal: 2012580 kB

Disk /dev/sda: 100 GiB, 107374182400 bytes, 209715200 sectors

C. Website design

Pathfinder website has been designed in collaboration with the IT developer who built the database, that served as a starting point of the graphic project.

Every graphic aspect has been taken care of, starting from the graphic guidelines set by the Operas project (fonts, colours...) and every icon has been designed in order to create a coherent coordinated graphic.

Although a prototype, the website is functional in all its parts, including the login mechanism and the account management. It already has a side menu to link to other future sections, in order for the actual project to expand.

Both the parts of the questions (questionnaire) and the answers (results) are structured with an accordion layout, in order to open and close the various sections and show only the parts the user is interested in while browsing.

The entire website is responsive, i.e. it can be viewed efficiently on all kinds of devices (desktop computers, tablets, smartphones).

VI. Pathfinder: how does it work?

This chapter is dedicated to the navigation of the portal interface prototype, the description of the different types of research envisaged, the different logics that guide them and the way in which the results are presented at this stage of development.

The last part of the chapter deals with the possibility for each service provider to log in through credentials and thus access their profile to modify it or create it.

A. Site map and menus

The goal of Pathfinder is to guide researchers in the vast world of scholarly communication services offered by Operas member service providers. The concept is summed up in the payoff you can find under the logo in the page freely accessible at <https://pathfinder.unito.it/>, where a support email address is also provided (Fig. 32).



Fig. 32.

Starting from the welcome page of the portal, you can browse Pathfinder through two menus:

- the first one placed on the horizontal bar (Fig. 33):



Fig. 33. Welcome page and menu

- the second is a drop-down menu that opens at the top right and has the same options as the first one (Fig. 34):

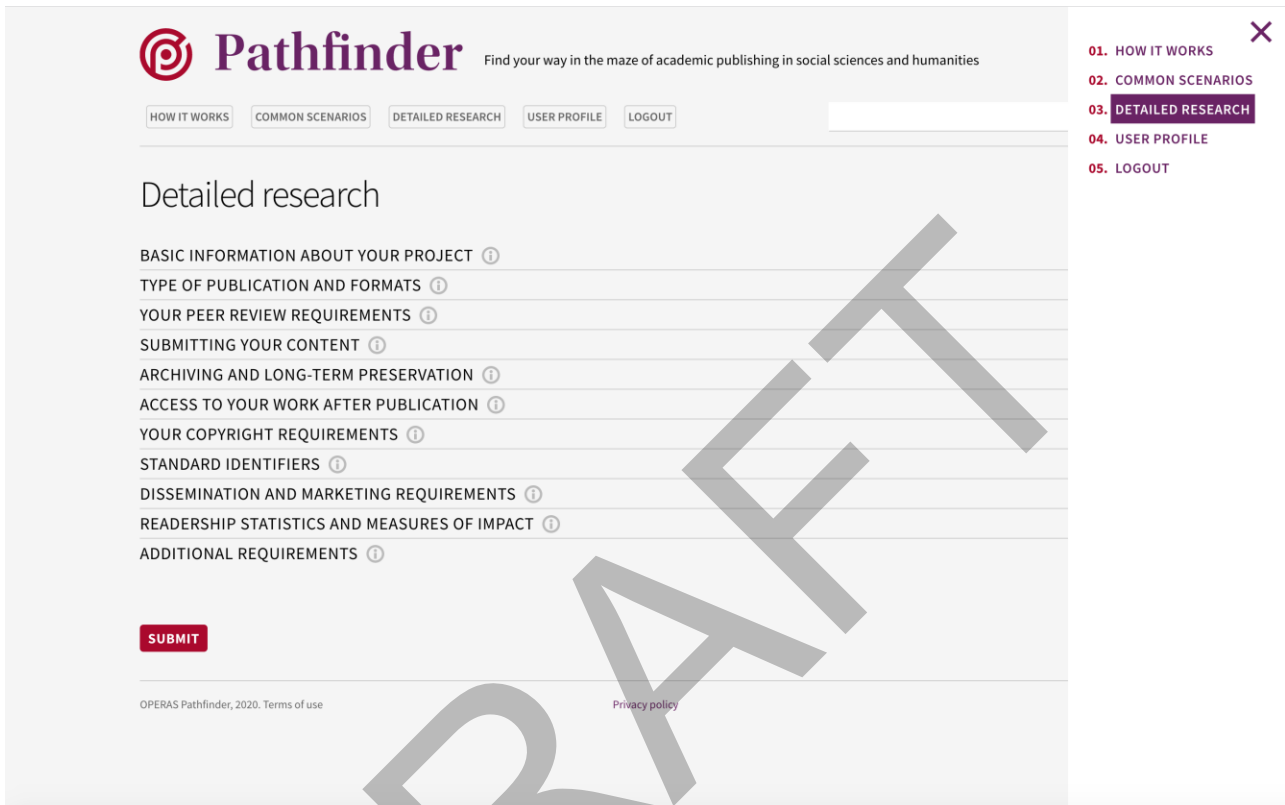
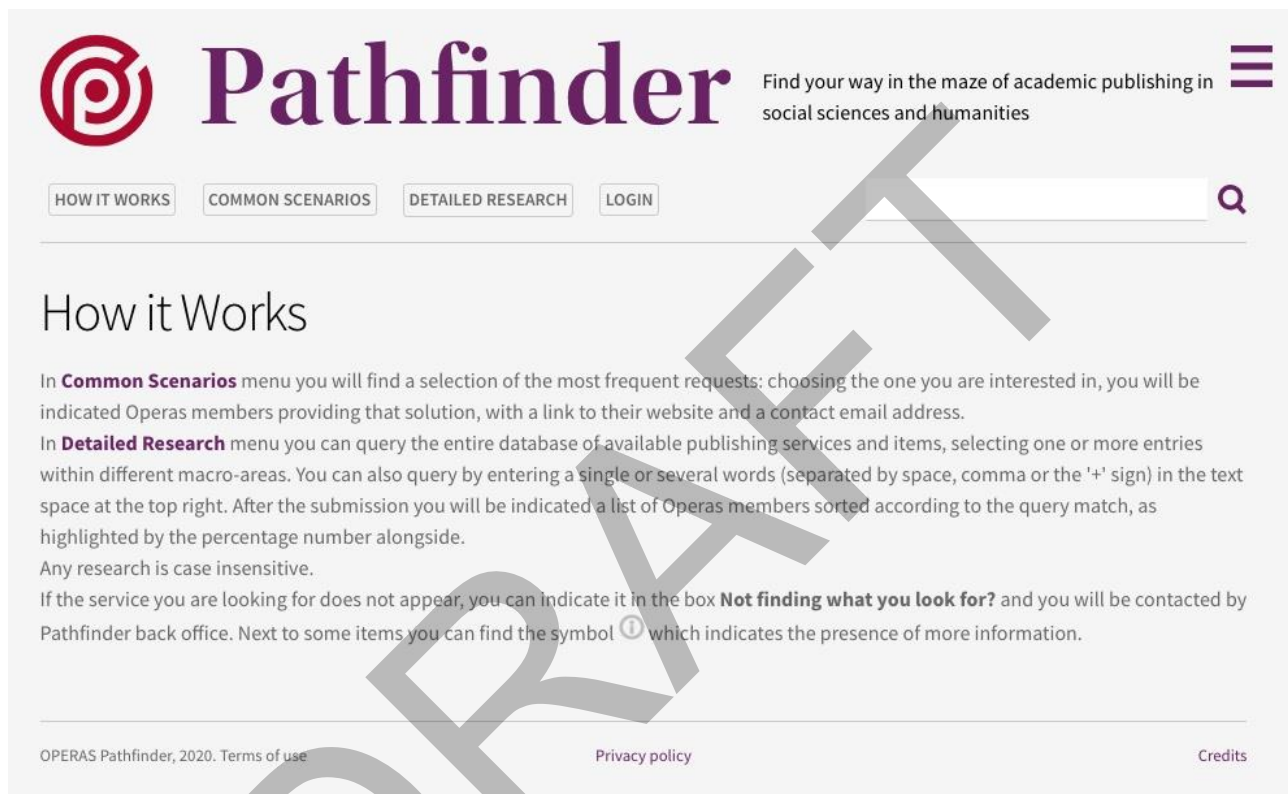


Fig. 34. Secondary menu

The menus consist of four options and a textual research space:

1. How it works

This page (<https://pathfinder.unito.it/how-it-works>) presents a brief explanation of the overall functioning of the tool and description of its functionalities, to allow the users to orient themselves between the different ways of using Pathfinder (Fig. 35).



2. Common Scenarios

Page dedicated to guided research (<https://pathfinder.unito.it/common-scenarios>), presenting a selection of the most frequent complex requests by researchers, based on the data collected through the questionnaires.

3. Detailed Research

A more specific search function (<https://pathfinder.unito.it/detailed-research>) which allows the user to query the entire database of surveyed publishing services and items.

4. Login

It provides access to Pathfinder through credentials, both for service providers who wish to update their service offering, and for researchers.

B. Search engine and records

Operas Pathfinder provides three different ways to query the database.

1. Common Scenarios

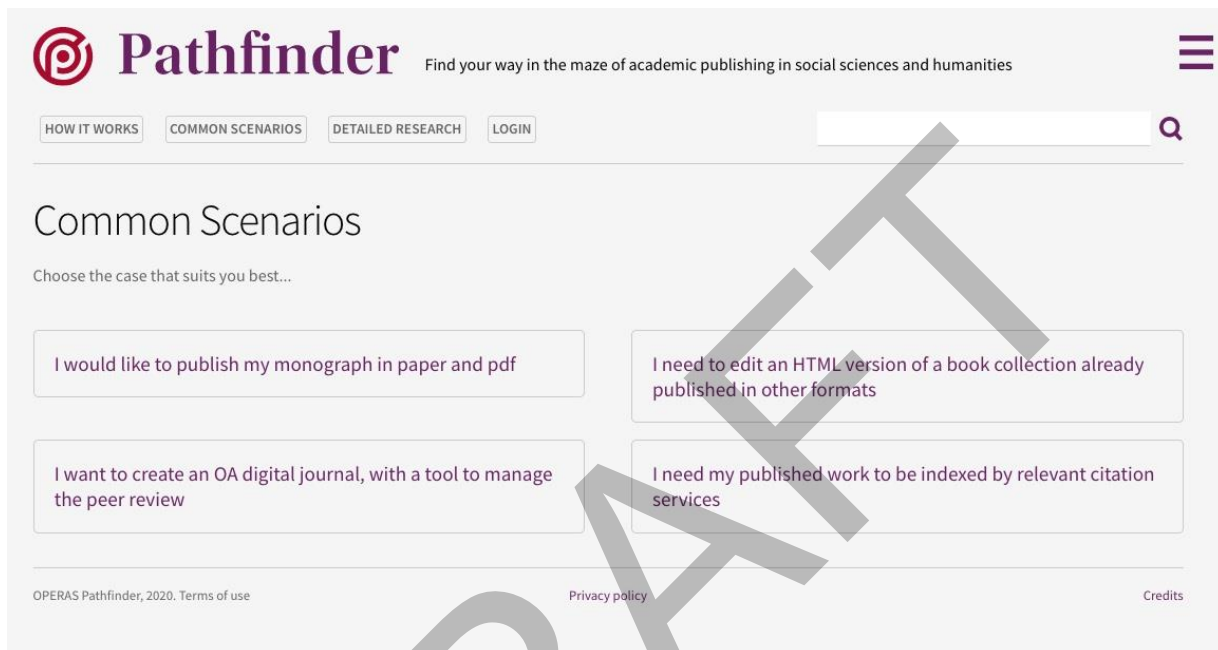


Fig. 35. Common Scenarios

The idea of proposing this form of guided research to researchers came from the examination of the answers to the questionnaires by the researchers themselves, who often expressed the need to find an overall answer to a complex publishing request (see page 42).

What the tool presents at the moment is a selection of four sample scenarios, with the aim of showing the potential of this solution, whose effectiveness will have to be more deeply tested throughout the development of the project, working particularly on the modeling of research publishing practices.

These are the four scenarios that can be browsed, in the current prototype (Fig. 35):

1. I would like to publish my monograph in paper and pdf.
2. I need to edit an HTML version of a book collection already published in other formats.
3. I want to create an OA digital journal, with a tool to manage the peer review.
4. I need my published work to be indexed by relevant citation services.

Selecting one of these scenarios results in one or more service providers offering the required service.

2. Detailed Research

The second way through which researchers can use the tool is the Detailed Research (Fig. 36), which allows them to query the service database by selecting one or more entries. The items are divided in macro-areas, corresponding to those of the questionnaire addressed to service providers (see Chapt. III).

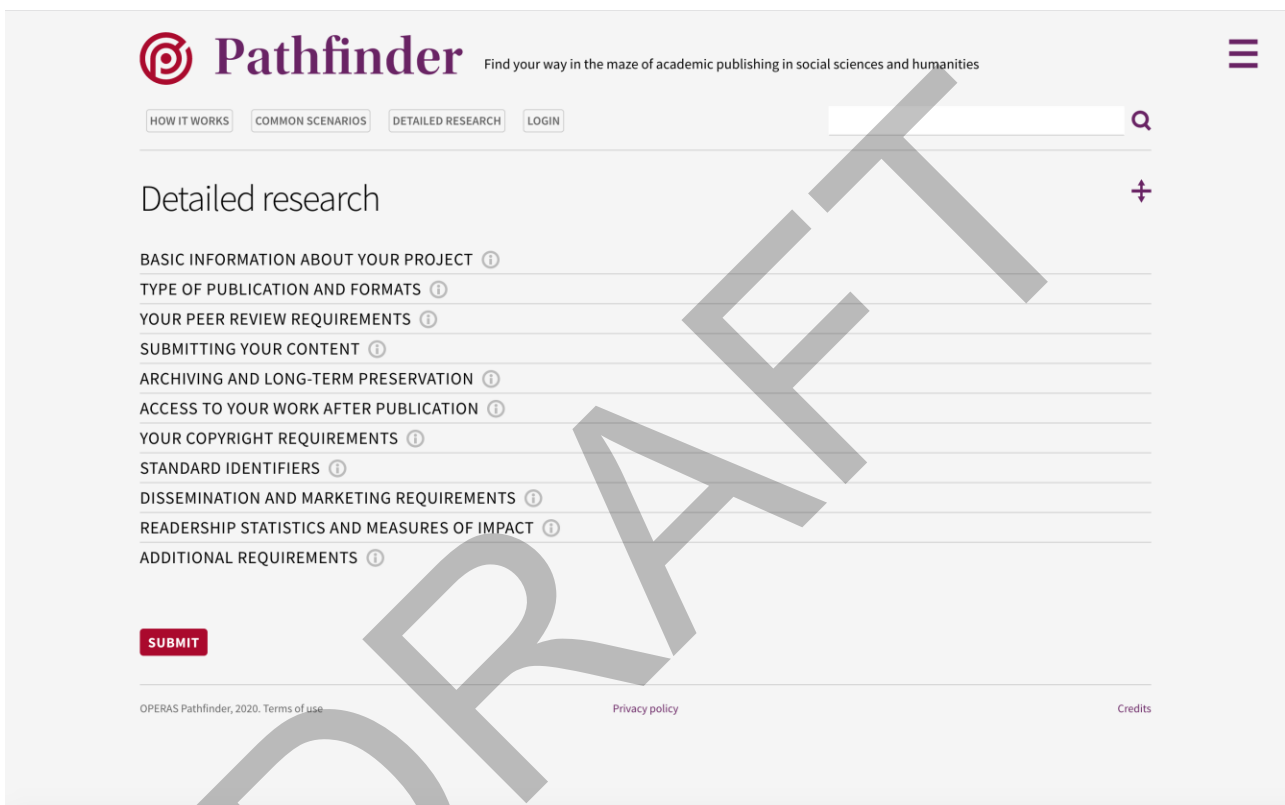


Fig. 36. Detailed Research

Selecting each of the eleven categories opens a dropdown containing a list of specific items (Fig. 37).

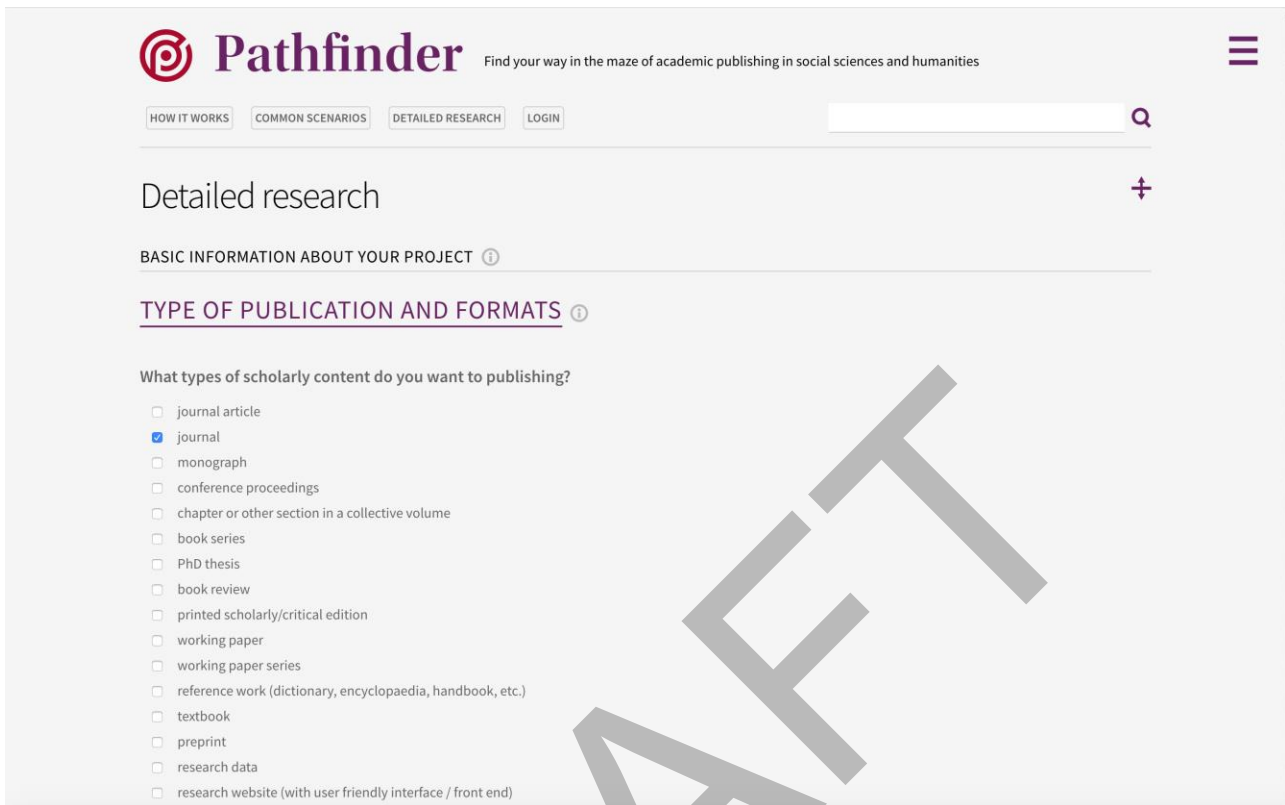


Fig. 37. The items list in the macro-area “Type of publication and formats”

The researcher can select a set of items and then submit his/her own request. The arrow button in the top right corner at 'Detailed Research' allows to simultaneously open the drop-down menus of all service groups that can otherwise be opened individually by clicking on each group.

A further aspect that characterizes the Detailed Research, particularly relevant for the future implementation of the services database, is the presence at the end of each macro-area of a field in which one can indicate any missing service (Fig. 38).

READERSHIP STATISTICS AND MEASURES OF IMPACT ①

Do you need to obtain any statistics or impact measures relating to your work?

- statistics about how much the work has been accessed/downloaded
- statistics about how much the work has been cited
- indexing in services such as Scopus, WoSCC, ERIH Plus, Google Scholar, DOAB, DOAJ, etc.
- measuring impact at the international or national level (e.g. Impact Factor, but also national publication classification systems)
- altmetrics and/or other measures of impact
- statistics about the number of copies sold
- Not finding what you look for?

ADDITIONAL REQUIREMENTS ①

Are there any additional services and/or functionalities that you require for your project?

- possibility to export bibliographic citations
- a version that can be publicly annotated
- a recommendation service for readers
- receiving royalties
- Not finding what you look for?

OPERAS Pathfinder, 2020. Terms of use
[Privacy policy](#)
[Credits](#)

Fig. 38. Detailed Research - Not finding what you look for?

3. Textual search

The last possible form of research is an open one, by entering the keywords of the query in the text space at the top right of the horizontal bar of the main menu. This search can be done by entering a single word or several words together, separated by space, comma or the '+' sign and press 'enter' to display the results. The research is case insensitive (e.g. searching for "journal", "Journal", "JOURNAL" or "jOURnaI" makes no difference in the results).

4. Detailed and Textual search results

Once selected the search parameters, clicking on the submit button, both for in Detailed and Textual search mode, you will get a list of the service providers that respond to the query, partially or totally, beneath a bar reporting the filters applied to the search (Fig. 39).

Pathfinder Find your way in the maze of academic publishing in social sciences and humanities

HOW IT WORKS COMMON SCENARIOS DETAILED RESEARCH USER PROFILE LOGOUT

Results 13 record found.

Search filters: journal, printed scholarly/critical edition, research website (with user friendly interface / front end)

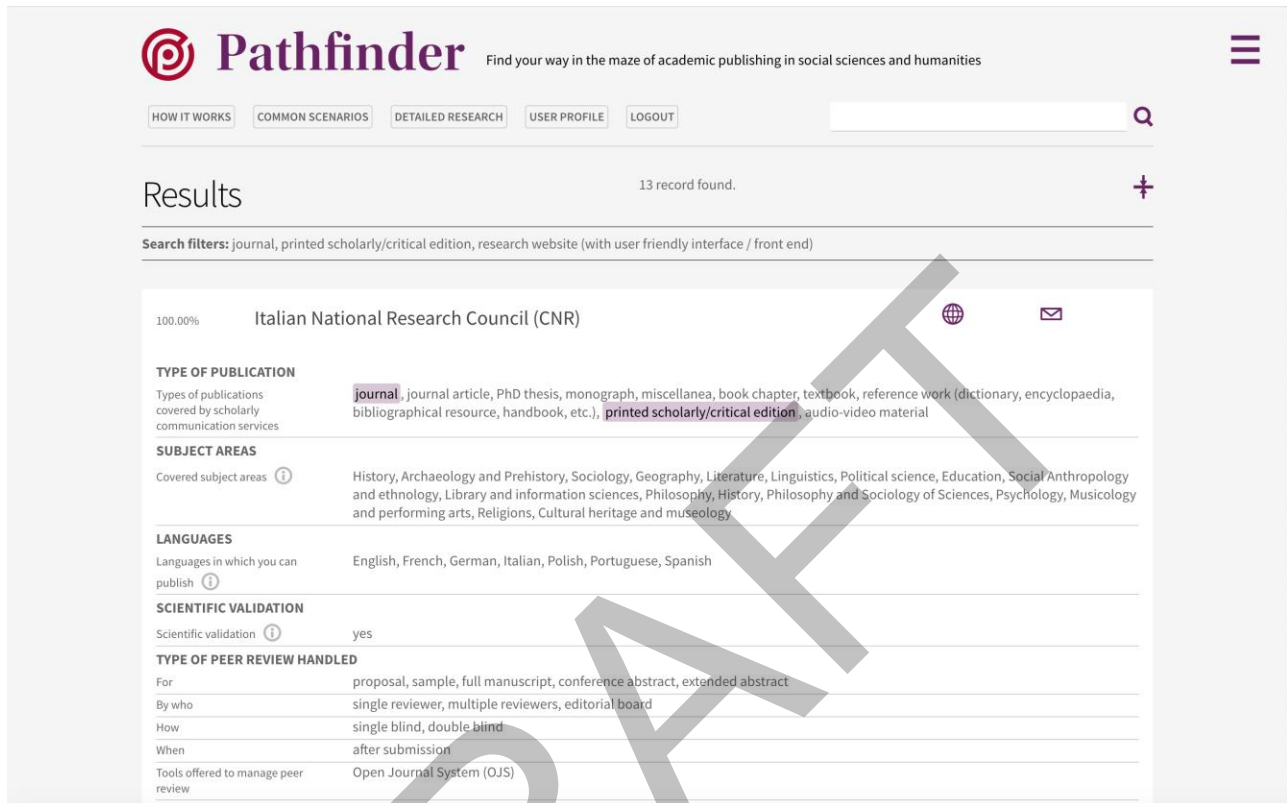
100.00%	Italian National Research Council (CNR)		
100.00%	University of Coimbra - Coimbra University Press		
66.67%	Inria, team ALMAnaCH		
66.67%	Institute of Literary Research of the Polish Academy of Sciences (IBL PAN)		
66.67%	National Documentation Centre (EKT/NHRF)		
66.67%	OpenEdition		
66.67%	Public Knowledge Project (PKP)		
66.67%	University of Liège		
66.67%	University of Ljubljana, Faculty of Arts		

Fig. 39. Search results

Service providers are listed in order of matching to the query, highlighted by the percentage number in the left column. The two icons on the right link respectively to the provider website and to the mail contact the researcher can use to get in touch.

The logic in the production of the results related to Detailed Research and Text Research proceeds through the logical operator 'OR' and not 'AND', this means that e.g. 'Business, Philosophy' will result in the individual occurrences of 'Business' and 'Philosophy' regardless of their position, not only the occurrences where the keywords appear together will be selected.

Selecting the individual service providers opens a dropdown with the services offered in which the research parameters are highlighted (Fig. 40).



Pathfinder Find your way in the maze of academic publishing in social sciences and humanities

HOW IT WORKS COMMON SCENARIOS DETAILED RESEARCH USER PROFILE LOGOUT

Results 13 record found.

Search filters: journal, printed scholarly/critical edition, research website (with user friendly interface / front end)

100.00% Italian National Research Council (CNR)

TYPE OF PUBLICATION
Types of publications covered by scholarly communication services: **journal**, journal article, PhD thesis, monograph, miscellanea, book chapter, textbook, reference work (dictionary, encyclopaedia, bibliographical resource, handbook, etc.), **printed scholarly/critical edition**, audio-video material

SUBJECT AREAS
Covered subject areas ⓘ History, Archaeology and Prehistory, Sociology, Geography, Literature, Linguistics, Political science, Education, Social Anthropology and ethnology, Library and information sciences, Philosophy, History, Philosophy and Sociology of Sciences, Psychology, Musicology and performing arts, Religions, Cultural heritage and museology

LANGUAGES
Languages in which you can publish ⓘ English, French, German, Italian, Polish, Portuguese, Spanish

SCIENTIFIC VALIDATION
Scientific validation ⓘ yes

TYPE OF PEER REVIEW HANDLED

For	proposal, sample, full manuscript, conference abstract, extended abstract
By who	single reviewer, multiple reviewers, editorial board
How	single blind, double blind
When	after submission
Tools offered to manage peer review	Open Journal System (OJS)

Fig. 40. Results and keywords

A further aspect, which we have already mentioned in Chapter IV, is the creation of a **glossary**. Next to some items you can find the symbol 'i' which indicates the presence of more information, which can be displayed selecting the symbol with the cursor. When the 'i' is selected, a pop-up opens that may contain references - as in the highlighted case (Fig. 41) - or clarifications.

Again, what is currently displayed is just a sample, to show the potential of the tool. The implementation and validation of a shared glossary in scholarly communication in SSH is an open challenge for the whole Operas infrastructure.

The screenshot shows the Pathfinder website interface. At the top, the Pathfinder logo is accompanied by the tagline "Find your way in the maze of academic publishing in social sciences and humanities". Navigation links include "HOW IT WORKS", "COMMON SCENARIOS", "DETAILED RESEARCH", and "LOGIN". A search bar is present on the right. Below the navigation, the "Results" section indicates "13 record found." and provides a "Search filters" option. The main content area displays filters for "Inria, team ALMAnaCH" and "100.00%". A pop-up window titled "Glossary" is overlaid on the page, displaying the URL "https://halshs.archives-ouvertes.fr/browse/domain". The pop-up also contains a large "DRAFT" watermark. The background filters include sections for "TYPE OF PUBLICATION", "SUBJECT AREAS", "LANGUAGES", "SCIENTIFIC VALIDATION", and "LICENCES".

Fig. 41. Glossary

DRAFT

C. Login and service provider profile

The last option in the menu is the login, which appears as shown in the image below (Fig. 42).

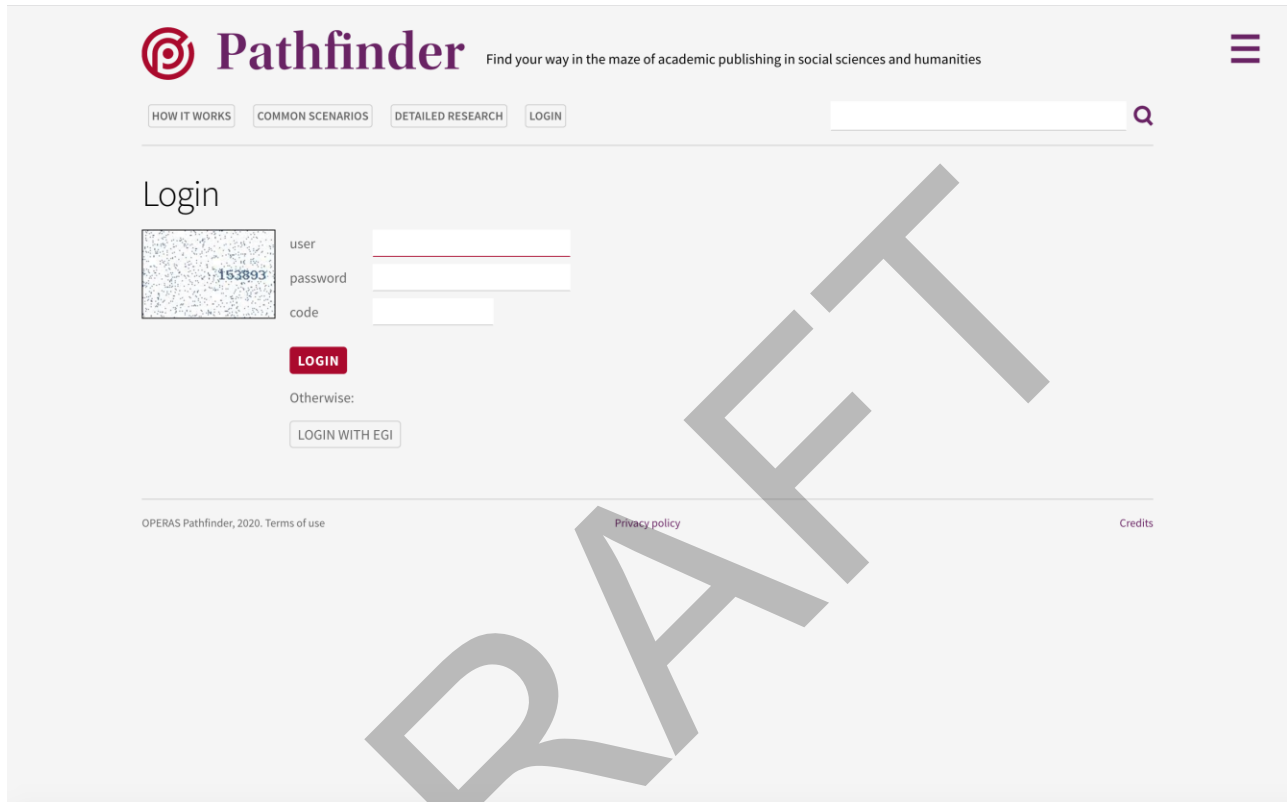


Fig. 42. Login

This possibility of access via credentials is designed for several purposes:

- it gives the possibility to service providers who have already joined to modify their services: either by adding new services by selecting them among those already present, or by creating new ones
- it allows new service providers to join

Several accreditation methods to Pathfinder have already been implemented:

- A user can login with AAI EGI (Fig. 43).
- If s/he is recognized as a valid existent user, s/he get the rights for Pathfinder (Fig. 44).
- If s/he is recognized as a valid OPERAS user but it is not yet in the database, a new user record is created.
- If s/he is not recognized as a valid OPERAS user, s/he gets a message informing that s/he is not authorized to login in Pathfinder (Fig. 45).
- A user can also login with a user record created by an Admin with a name and a password that the user can modify (Fig. 46).
- Only the Admin can create a new service provider and link it to a user.
- When a user is linked to a service provider, the user can modify the service provider data (Fig. 47).
- Selecting 'EDIT SERVICE PROVIDERS' option, it will be possible to modify the services offer (Fig. 48).



Fig. 43. EGI login

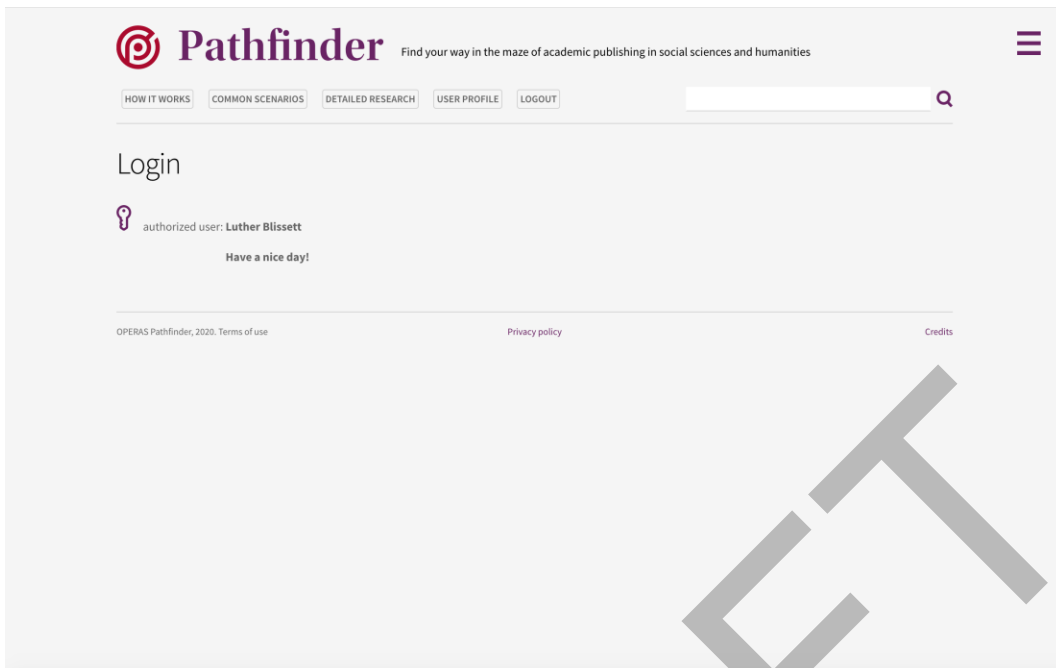


Fig. 44. Login valid user

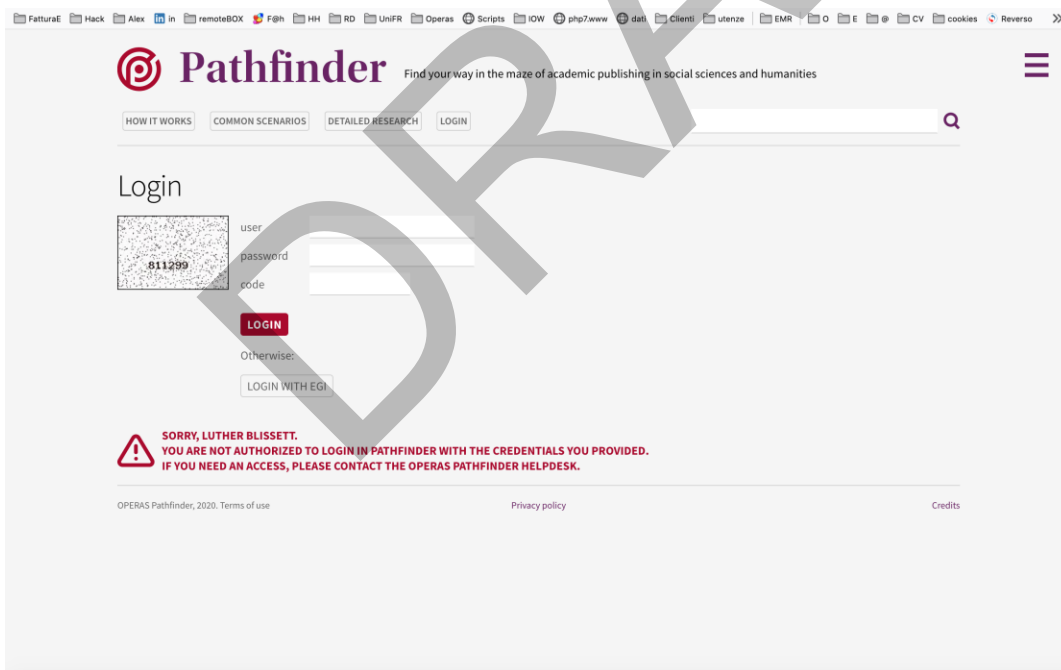


Fig. 45. Login not valid

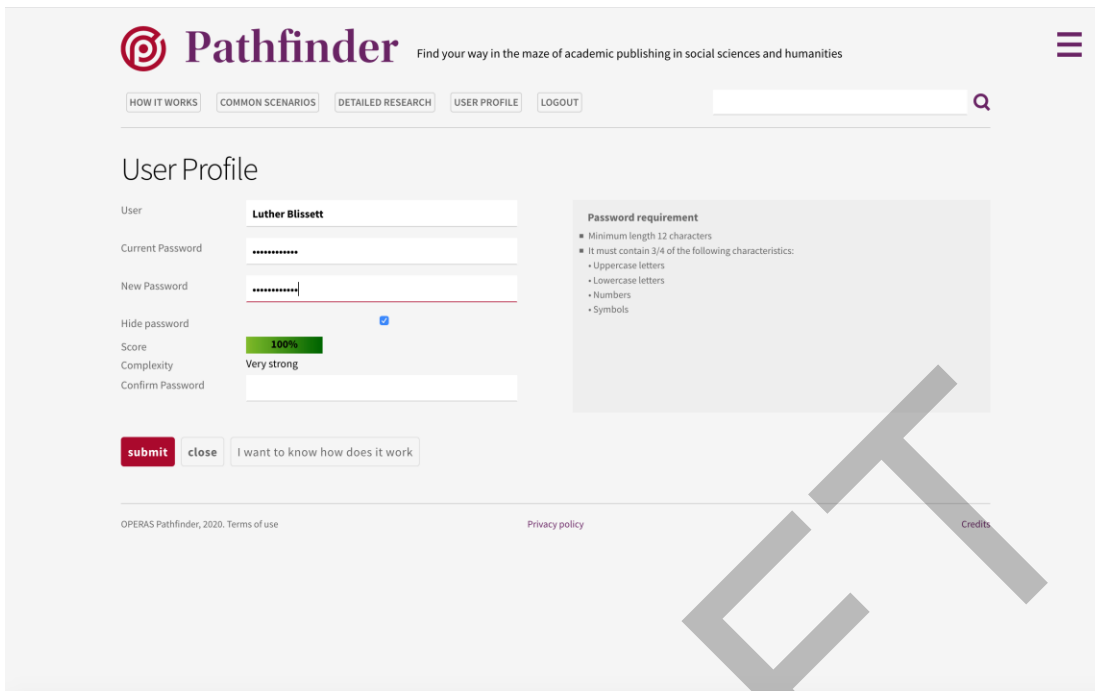


Fig. 46. Login user record created by Admin

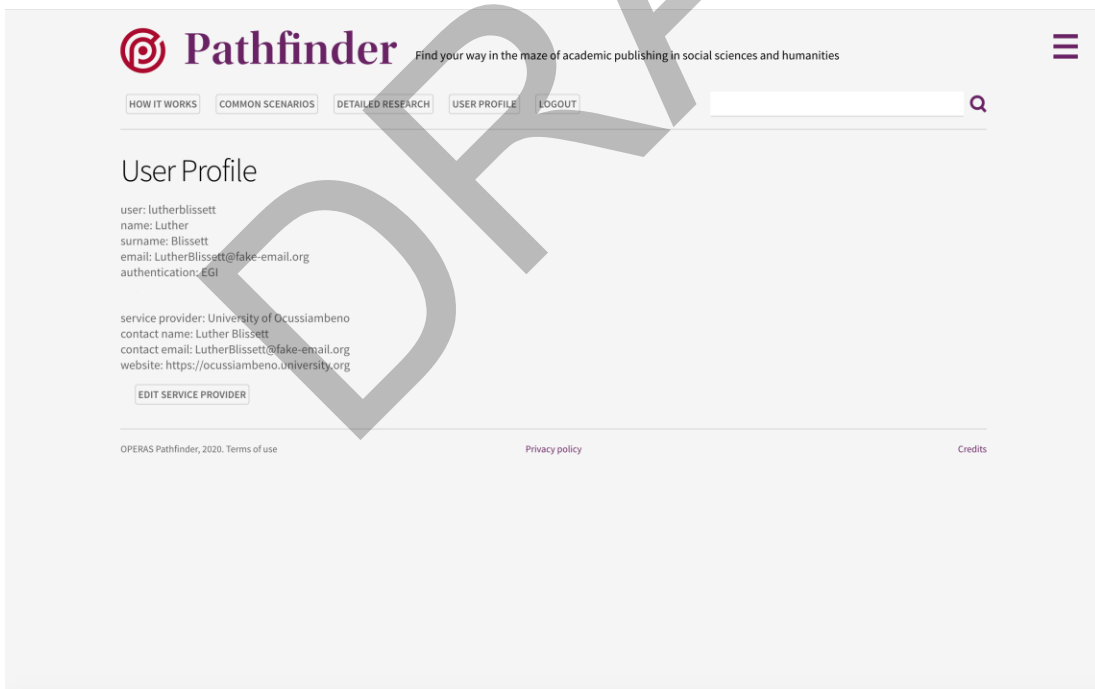


Fig. 47. User profile EGI with linked service provider

Pathfinder Find your way in the maze of academic publishing in social sciences and humanities

HOW IT WORKS COMMON SCENARIOS DETAILED RESEARCH USER PROFILE LOGOUT

Service Provider Profile

name University of Ocussiambeno

contact name Luther Blissett

contact email LutherBlissett@fake-email.org

website https://ocussiambeno.university.org

TYPE OF PUBLICATION

Types of publications covered by scholarly communication services

- journal
- mega journal
- journal article
- working paper
- PhD thesis
- monograph
- miscellanea
- book chapter
- textbook

Fig. 48. Service provider profile edit

Other accreditation methods could be easily added at a later stage of development.

VII. Pathfinder logo

Pathfinder logo, not initially planned and not required by the T4.1 summary, was designed both to underline the identity of this tool, and to highlight (above all) the relationship with the Operas project of which it is part.

The logo, in fact, uses both the institutional colours and the typography used for Opera's graphic identity.

The graphic sign is inspired by the claim "Find your way in the maze of academic publishing in social sciences and humanities" which, in the complete version of the logo, can be found under the word "Pathfinder".

The idea is to condense in a single sign more concepts such as:

- The circular shape is a reference to the O of Operas;
- The shape recalls that of a target: Pathfinder helps the user to score in their search;
- The shape recalls the idea of a very simple labyrinth: Pathfinder simplifies the search, making the user forget its complexity;
- The shape includes the P of Pathfinder.

Finally, some more technical aspects.

As said, the colour palette has the same colours used in the Operas logo, both the main ones (red and purple) and the two secondary ones (black and grey).

Ditto for the typography, the main font is the Utopia Display Semibold and the secondary is the Univers LT Pro Light.

The name Pathfinder was preferred to be written with only a capital initial, as also suggested by Dr. Judith Schulte and Dr. Elizabeth Ernst who are in charge of Operas' communication.



IX. Open issues

The decision not to limit the job to the requested “design of a common access point to services”, but to build a working prototype, increasing the investment of resources initially planned by Lexis Compagnia Editoriale in Torino, while respecting the expected timing (M5-M11), proved to be a very demanding effort.

What has been achieved can obviously not be considered a complete and ready-to-use tool. Through the pages of this deliverable we have repeatedly highlighted the aspects on which the current structure of the tool needs, not only a work of enrichment, completion and refinement, but further project reflections.

It should nevertheless be pointed out that it is precisely the fact that we already have a working prototype that allows us to test in a concrete way the pros and cons of the designed solutions.

One aspect in particular emerged when testing actually the tool after its completion: the need to work differently on the catalogue of services provided by Operas members, which are in fact subjects with quite different characteristics. This variety as well as profiling difficulty reflects the transition phase the world of scholarly communication in social science and humanities is going through: those actors who have traditionally been entrusted with the functions of publishers (who, for their part, are increasingly diversifying their offer) are increasingly flanked by others able to provide all or part of the services requested by researchers, whose needs are also evolving.

The problem therefore arises to account for all this in a much more granular way. With regard to Pathfinder, organising the catalogue of services in such a way as to make the querying of the tool a rewarding experience will require an additional modelling effort, perhaps a reorganization of the database itself, starting with a more targeted survey work. At the present time the survey and cataloguing work has resulted in a form for each provider as shown in Fig. 40.

With regard to the main objective of T4.1 (“to help researchers in their selection of an appropriate publishing venue and, generally, of a scholarly communication strategy”), the survey work (see Chapt. IV) seems on the contrary to have been sufficiently effective. It should however be stressed that needs of a quite different scale have emerged, as the choice to offer different query modes of Pathfinder database tried to account for.

The tool will not undergo any further improvements after the end of the task, and will remain available for those who want to test it. Suggestions and contributions for improvement will be collected by Lexis Compagnia Editoriale in Torino so that they can be taken into account when the tool can be developed more consistently.

Annexes

1. Operas members questionnaire
2. Questionnaire for researchers

DRAFT

OPERAS MEMBERS QUESTIONNAIRE on scholarly communication services

Dear colleagues,

in the context of OPERAS-P project, we ask for your cooperation in creating a list of the scholarly communication services provided by Operas members, in order to design a tool called Pathfinder that will allow the researchers select and access the services that best correspond to their needs in the field of open scholarly communication.

The Pathfinder will be one of the core services of OPERAS and will have two functions:

1. to guide the SSH researchers towards the scholarly communication services provided by OPERAS members that fit their needs
2. to help OPERAS members clarify, including for themselves, what are the services they provide and what is their added value for the community. Therefore, even if you provide your service to the researchers from your institution only, it is important that you answer the survey.

Please fill in the following survey no later than **15 April 2020**.

In case you need any clarification please do not hesitate to contact us: operas-p@lexis.srl (mailto:operas-p@lexis.srl)

How to respond:

- Where indicated you can flag more than one answer
- You can skip a question if it doesn't concern you and the services you provide. Please, leave the reason why in the comment below the answer.

There are 53 questions in this survey.

Member name *

Please write your answer here:

Email contact *

Please write your answer here:

Website *

Please write your answer here:

DRAFT

For which types of publications do you provide scholarly communication services?

You can indicate more than one answer.

🗖 Check all that apply

Please choose **all** that apply:

- journal
- mega journal
- journal article
- working paper
- PhD thesis
- monograph
- miscellanea
- book chapter
- textbook
- reference work (dictionary, encyclopaedia, bibliographical resource, handbook, etc.)
- book series
- working paper series
- conference proceedings
- scholarly (critical) edition
- research data
- audio-video material
- blog posts
- Other:

Please use this field for further comments

Please write your answer here:

Which of the following subject areas do you cover?

You can indicate more than one answer.

Source: <https://halshs.archives-ouvertes.fr/browse/domain>
(<https://halshs.archives-ouvertes.fr/browse/domain>)

📌 Check all that apply

Please choose **all** that apply:

- Law
- History
- Archaeology and Prehistory
- Sociology
- Economics and Finance
- Geography
- Literature
- Linguistics
- Business administration
- Political science
- Education
- Social Anthropology and ethnology
- Library and information sciences
- Art and art history
- Architecture, space management
- Philosophy
- History, Philosophy and Sociology of Sciences
- Psychology
- Musicology and performing arts
- Religions
- Classical studies
- Environmental studies
- Cultural heritage and museology
- Gender studies
- Methods and statistics
- Biological anthropology
- Demography
- Other:

Please use this field for further comments

Please write your answer here:

What languages do your services cover?

You can indicate more than one answer.

🗳️ Check all that apply

Please choose **all** that apply:

- Croatian
- Dutch
- English
- French
- German
- Greek
- Italian
- Polish
- Portuguese
- Norwegian
- Slovene
- Spanish
- Swedish

Other:

Please use this field for further comments

Please write your answer here:

1. Publishers

🗳️ Choose one of the following answers

Please choose **only one** of the following:

- University presses
- Publishing departments in academic institutions
- Library based publishers
- Scholar-led publishers
- Scholarly Societies
- Other not-for-profit publishers
- Commercial publishers SMEs
- Commercial publishers BEs

2. Dissemination platforms and repositories

🗳️ Choose one of the following answers

Please choose **only one** of the following:

- Institutional
- National
- International

3. Other digital tools and services providers

🗳️ Check all that apply

Please choose **all** that apply:

- Authoring tools and services providers
- Peer-reviewing tools and services providers
- Copy-editing tools and services providers
- Annotation tools and services providers
- Marketplace tools and services
- Library tools and services

Other:

4. Stakeholders: Policy Makers

🗳️ Check all that apply

Please choose **all** that apply:

- Ministries of Research and Higher Education
- Research Councils
- Evaluation agencies

Other:

5. Stakeholders: Infrastructure

🗳️ Choose one of the following answers

Please choose **only one** of the following:

- E-infrastructures - National
- E-infrastructures - Regional
- Research Infrastructures - National
- Research Infrastructures - Regional
- Research Infrastructures - International

6. Stakeholders: Funders

🗳️ Choose one of the following answers

Please choose **only one** of the following:

- Regional public
- National public
- Charities and private
- International

7. Stakeholders: Institutions

🗳️ Choose one of the following answers

Please choose **only one** of the following:

- Universities
- Research institutes
- Libraries

Please use this field for further comments

Please write your answer here:

Is there a form of scientific validation to access your services (e.g. by a scientific committee)?

🗳️ Choose one of the following answers

Please choose **only one** of the following:

yes

no

Make a comment on your choice here:

For

🗳️ Check all that apply

Please choose **all** that apply:

proposal

sample

full manuscript

preprint

conference abstract

extended abstract

Other:

By who

🗖 Check all that apply

Please choose **all** that apply:

- single reviewer
- multiple reviewers
- peer-to-peer review
- editorial board
- crowdsourced

Other:

How

🗖 Check all that apply

Please choose **all** that apply:

- single blind
- double blind
- not blind
- open reviews

Other:

When

🗖 Check all that apply

Please choose **all** that apply:

- before submission
- after submission
- after publication

Other:

Do you provide researchers with some tools to manage peer review?

🗳 Check all that apply

Please choose **all** that apply:

Open Journal System (OJS)

Open Monograph Press (OMP)

Other:

Please use this field for further comments

Please write your answer here:

DRAFT

Under what types of licenses do you allow publication?

You can indicate more than one answer

🗖 Check all that apply

Please choose **all** that apply:

- All rights reserved ("traditional" copyright clause)
- Creative Commons Attribution (CC BY)
- Creative Commons Attribution + Share Alike (CC BY-SA)
- Creative Commons Attribution + Non-commercial (CC BY-NC)
- Creative Commons Attribution + Non-commercial + Share Alike (CC BY-NC-SA)
- Creative Commons Attribution + No Derivatives (CC BY-ND)
- Creative Commons Attribution + Non-commercial + No Derivatives (CC BY-NC-ND)
- GNU General Public License (GNU GPL)
- GNU Lesser General Public License (GNU LGPL)
- GNU Affero General Public License (GNU AGPL)
- GNU Free Documentation License (GNU FDL)

Other:

Please use this field for further comments

Please write your answer here:

What is your access policy?

You can indicate more than one answer

🗖 Check all that apply

Please choose **all** that apply:

- closed access (traditional model, readers pay for access)
- open access option in a subscription-based publication (so called “hybrid journals”)
- open access with publication fee to be paid upfront (Article/Book Processing Charge)
- open access without a publication fee
- open access with embargo
- open access without embargo

Other:

Please use this field for further comments

Please write your answer here:

In which formats do you publish?

You can indicate more than one answer

🗨 Check all that apply

Please choose **all** that apply:

- print (paperback and/or hardback)
- PDF
- PDF/A
- HTML
- EPUB (any version)
- EPUB certified as accessible for impaired readers
- Amazon proprietary formats (KPF, MOBI)
- "Enhanced" digital editions (eg. with embedded audio/visual material, 3D visualisations)
- XML TEI
- XML JATS
- XML other
- SQL
- RDF
- PHP
- Python
- XHTML
- XHTML using a CMS such as Wordpress
- Other:

Please use this field for further comments

Please write your answer here:

Accepted format text.**What kind of files do you accept to be compatible with your editorial workflow?**

You can indicate more than one answer

🗨 Check all that apply

Please choose **all** that apply:

- Microsoft Word files
- Open Office files
- Latex files
- XML files
- SQL dumps
- camera-ready (already formatted and to be published as is) such as PDF
- Other:

Please use this field for further comments

Please write your answer here:

What kind of pre-publication services do you offer?

You can indicate more than one answer

🗖 Check all that apply

Please choose **all** that apply:

- copyediting (reviewing and correcting a text to improve its readability)
- language editing (language check)
- proofreading (correcting typos, checking consistency and adherence to a style guide)
- translation
- translation revision
- translation rights
- image rights
- formatting and pagination for print
- formatting and pagination for web
- creation of indexes and table of contents for print
- creation of indexes and table of contents for web
- bibliographic checks
- creation of a specific branding for a journal/book series
- ability to accept camera-ready works (already formatted and to be published as is)
- Other:

Please use this field for further comments

Please write your answer here:

Which dissemination and marketing strategies do you provide?

You can indicate more than one answer

🗖 Check all that apply

Please choose **all** that apply:

- dissemination of metadata to commercial and non-commercial databases and catalogues (eg. DOAB, JISC KB, OCLC/Worldcat, ProQuest KB, Ebsco KB)
- dissemination of full-text digital version to commercial and non-commercial platforms (eg. JSTOR, Ebscohost, Elib, ProQuest, OAPEN, OpenEdition)
- marketing of the publication on social media
- ability to organise or take parts in events (eg. book launches, conferences) and provide marketing materials (eg. leaflets)
- distribution to University libraries in the relevant field (e.g. through subscriptions)
- subscription (library)
- easy sharing through social networks
- print on demand
- ability to provide a number of complimentary printed copies for authors, reviewers, etc.
- ability to provide a number of complimentary printed copies to libraries
- you are in charge of promoting books in bookshops through various strategies
- you aren't in charge of promoting books in bookshops through various strategies
- you use a promotional network for promoting your titles

Other:

Please use this field for further comments

Please write your answer here:

Do you provide data related to readership statistics and impact measures?

You can indicate more than one answer

🗖 Check all that apply

Please choose **all** that apply:

- ability to provide stats about how much the work has been visited/downloaded
- ability to provide stats about how much the work has been cited
- ability to provide altmetrics and/or other measures of impact
- ability to assist with measuring impact at the international or national level (eg. Impact Factor, but also national publication classification systems)
- ability to assist with indexing in services such as Scopus, WoSCC, ERIH Plus, Google Scholar, DOAB, DOAJ, etc.

Other:

Please use this field for further comments

Please write your answer here:

Which archiving and long-term preservation strategies do you offer?

You can indicate more than one answer

🗳 Check all that apply

Please choose **all** that apply:

- legal deposit
- submission to long-time preservation services such as Portico, LOCKSS, CLOCKSS
- archiving in an institutional or subject-specific repository
- Other:

Please use this field for further comments

Please write your answer here:

Do you provide the possibility to publish academic content online?

If you do, what system do you use?

🗳 Check all that apply

Please choose **all** that apply:

- OJS (Open Journal Systems)
- OMP (Open Monograph Press)
- Lodel (Logiciel d'édition électronique)
- Autonomous Website
- Other:

Do you also manage or provide assistance for the platform and its contents?

🗳️ Choose one of the following answers

Please choose **only one** of the following:

yes

no

Other

Please use this field for further comments

Please write your answer here:

DRAFT

Do you provide any standard identifiers?

You can indicate more than one answer

🗖 Check all that apply

Please choose **all** that apply:

- Digital Object Identifier (DOI)
- Other Handle System protocols
- International Standard Book Number (ISBN)
- International Standard Serial Number (ISSN)
- Uniform Resource Name (URN)
- Do you offer any visualization of ID (ORCID)?
- Do you offer any registration of ID (ORCID)?
- URN-NBN
- Funding Registry

Other:

Please use this field for further comments

Please write your answer here:

What kind of post-publication services do you offer?

You can indicate more than one answer

🗖 Check all that apply

Please choose **all** that apply:

- willingness to pay royalties
- ability to export bibliographic citations
- creation of a version that can be publicly annotated
- recommendation services (https://en.wikipedia.org/wiki/Recommender_system
(https://en.wikipedia.org/wiki/Recommender_system))

Other:

Please use this field for further comments

Please write your answer here:

What other services do you offer in addition to those closely related to publication?

You can indicate more than one answer

🗖 Check all that apply

Please choose **all** that apply:

- create a database
- create research website (with user friendly interface / front end)
- develop/create a software

Other:

Please use this field for further comments

Please write your answer here:

Do you offer your services:

You can indicate more than one answer

🗖 Check all that apply

Please choose **all** that apply:

- to members of your institution for free
- to members of your institution for a fee
- to others in your country for free
- to others in your country for a fee
- to others within European Research Area (ERA) for free
- to others within European Research Area (ERA) for a fee
- to others outside European Research Area (ERA) for free
- to others outside European Research Area (ERA) for a fee
- to others within Europe (EU) for free
- to others within Europe (EU) for a fee
- to others outside Europe (EU) for free
- to others outside Europe (EU) for a fee

Other:

Please use this field for further comments

Please write your answer here:

Do you advise and help authors in finding suitable funding for publishing their work with you?

● Choose one of the following answers

Please choose **only one** of the following:

yes

no

Other

Please use this field for further comments

Please write your answer here:

Thank you very much for your cooperation.

Submit your survey.

Thank you for completing this survey.

OPERAS-P: Common access point to services

Questionnaire on perspective users' needs and expectations

In the context of the OPERAS-P project (<https://operas.hypotheses.org/operas-p>) we are developing a tool called *Pathfinder* that will allow researchers like you to select and access the services that best correspond to their needs in the field of open scholarly communication, with a particular focus on the Humanities and Social Sciences. You may want to publish an article or a monograph, create a journal or a book series, or even establish a new publisher: *Pathfinder* will try to help you achieve these goals by filtering through the services provided by companies and institutions belonging to the OPERAS infrastructure and finding what best matches your needs.

This tool will be one of the core services of OPERAS and will have two functions:

1. guide SSH researchers towards the scholarly communication services provided by OPERAS members that best fit their needs;
2. help OPERAS members present the services they provide and clarify how these serve the scholarly community.

With this questionnaire, we are asking for your help in reaching the first of these two goals: we need your input to map users' needs and design the *Pathfinder* so it can best serve our community. Your answers will help us expand our understanding on what a common access point to publishing services should include.

A few notes on the questionnaire:

- You can choose multiple answers for most of the questions you will be asked;
- If none of the suggested answers makes sense to you, please add your own by selecting "Other" and write in the text box;
- At the end of each group of questions, we provide a space where you can comment on the addressed topic and give us additional feedback;
- Only a handful of questions are compulsory (6 in total): if you find questions that are not relevant to you just move straight to the next. We will ask you, however, to please tell us why you skipped it.

In case you need any further clarification please do not hesitate to contact us: operas-p@lexis.srl (mailto:operas-p@lexis.srl)

Thank you very much in advance for your cooperation!

There are 49 questions in this survey.

What is your current academic position? *

🗳️ Choose one of the following answers

Please choose **only one** of the following:

- PhD student
- Early career lecturer or researcher without tenure track
- Early career lecturer or researcher with tenure track
- Tenured or permanent lecturer/researcher
- Independent researcher
- Other

DRAFT

What is your field of study? If your research is interdisciplinary, remember you can tick more than one category.

*

🔔 Check all that apply

Please choose **all** that apply:

- Law
- History
- Archaeology and Prehistory
- Sociology
- Economics and Finance
- Geography
- Literature
- Linguistics
- Business administration
- Political science
- Education
- Social Anthropology and ethnology
- Library and information sciences
- Art and art history
- Architecture, space management
- Philosophy
- History, Philosophy and Sociology of Sciences
- Psychology
- Musicology and performing arts
- Religions
- Classical studies
- Environmental studies
- Cultural heritage and museology
- Gender studies
- Methods and statistics
- Biological anthropology
- Demography

Other:

We have adopted here the same list used by the MORESS project (<https://cordis.europa.eu/project/id/HPSE-CT-2002-60060>).

What country are you answering from?

*

❗ Choose one of the following answers

Please choose **only one** of the following:

- Belgium
- Croatia
- France
- Germany
- Greece
- Italy
- Luxembourg
- Netherlands
- Norway
- Poland
- Portugal
- Slovenia
- Sweden
- United Kingdom
- Brazil
- Canada
- United States
- Other

DRAFT

If you are affiliated to an institution, please tells us which one.

Please write your answer here:

Which languages do you mostly use when doing research, writing and publishing?

*

i Check all that apply

Please choose **all** that apply:

- Croatian
- Dutch
- English
- French
- German
- Greek
- Italian
- Polish
- Portuguese
- Norwegian
- Slovene
- Spanish
- Swedish

Other:

Have you ever covered any of these roles?

🗨 Comment only when you choose an answer.

Please choose all that apply and provide a comment:

Author (please indicate roughly how many times)

Peer reviewer (please indicate roughly how many times)

Editor in chief of a journal (please indicate roughly how many times)

Book editor (please indicate roughly how many times)

Book series editor (please indicate roughly how many times)

Translator (please indicate roughly how many times)

Founder or director of an academic press

Other:

Do you have any additional feedback to give us on this group of questions?

Please write your answer here:

DRAFT

What types of scholarly content do you plan on publishing?

🗨️ Check all that apply

Please choose **all** that apply:

- journal
- mega journal (that cover different subject areas)
- journal article
- working paper
- PhD thesis
- monograph
- chapter or other section in a collective volume
- textbook
- reference work (dictionary, encyclopaedia, bibliographical resource, handbook, etc.)
- book series
- working paper series
- conference proceedings
- book review
- printed scholarly/critical edition
- digital scholarly/critical edition
- research data (e.g. in a database)
- software
- research website (with user friendly interface / front end)
- audio-video material
- blog posts
- Other:

You have chosen one or more “traditional” publication types above (e.g. journal, article, working paper, thesis, monograph, book chapter, textbook, reference work, book series, proceedings, reviews or traditional scholarly edition). In which formats do you wish they were made available?

Only answer this question if the following conditions are met:

Answer was 'printed scholarly/critical edition' or 'book review' or 'conference proceedings' or 'working paper series' or 'book series' or 'reference work (dictionary, encyclopaedia, bibliographical resource, handbook, etc.)' or 'textbook' or 'chapter or other section in a collective volume' or 'monograph' or 'PhD thesis' or 'working paper' or 'journal article' or 'mega journal (that cover different subject areas)' or 'journal' at question '8 [Q7]' (What types of scholarly content do you plan on publishing?)

🚫 Check all that apply

Please choose **all** that apply:

- print (paperback and/or hardback)
- PDF
- web page (XHTML)
- EPUB (any version)
- EPUB certified as accessible for impaired readers
- Other e-book proprietary formats (e.g. KPF, MOBI)
- “Enhanced” digital editions (e.g. with embedded audio/visual material, 3D visualisations)
- XML
- Other:

You have chosen one or more “non-traditional” publication types above (e.g. digital scholarly edition, research data, software, research website, audio-video material, blog). Can you tell us more about the formats, programming languages, standards, and/or data models that you plan to use?

Only answer this question if the following conditions are met:

Answer was 'blog posts' or 'audio-video material' or 'research website (with user friendly interface / front end)' or 'software' or 'research data (e.g. in a database)' or 'digital scholarly/critical edition' at question '8 [Q7]' (What types of scholarly content do you plan on publishing?)

Please write your answer here:

Please add the name of each of them, possibly followed by an online reference for it in brackets. If you list several, please separate them with a semicolon.

Do you have any additional feedback to give us on this group of questions? Also, if you have decided to skip any of the above, please let us know why.

Please write your answer here:

You need to validate some scholarly content before publishing it. Do you want/need the publisher to organise a formal peer review process?

🗳️ Choose one of the following answers

Please choose **only one** of the following:

Yes

No

DRAFT

What types of peer review do you consider suitable to your publication?

🗨 Check all that apply

Please choose **all** that apply:

- review proposal
- review sample
- review full manuscript
- review preprint
- review abstract
- before submission
- after submission
- after publication
- single reviewer
- multiple reviewers
- editorial board only
- crowdsourced review
- apply single blind
- apply double blind
- avoid blind altogether
- apply open review

Other:

By necessity this list puts together different aspects of peer review: what is reviewed, when, by whom, and with which degree of openness. You can of course select any options that applies.

Do you have any preferred tool for managing peer review?

🗨 Check all that apply

Please choose **all** that apply:

Open Journal System (OJS)

Open Monograph Press (OMP)

Other:

Do you have any additional feedback to give us on this group of questions? Also, if you have decided to skip any of the above, please let us know why.

Please write your answer here:

In which formats do you expect to be able to submit your content to the publisher?

🚫 Check all that apply

Please choose **all** that apply:

- Microsoft Word native formats (.doc, .docx)
- Rich Text Format (.rtf)
- Open Document Format (.odt)
- Latex files
- Markdown files
- XML files
- database dumps
- camera-ready (already formatted and to be published as is) such as PDF
- Other:

Which of these services relating to editing and language review would you want the publisher to take care of?

🚫 Check all that apply

Please choose **all** that apply:

- copyediting (reviewing and correcting to improve readability)
- proofreading (correcting typos, checking consistency and adherence to a style guide)
- language editing
- translation
- translation revision
- formatting and pagination
- creation of indexes and table of contents
- bibliographic checks
- creation of a specific branding for journals/book series
- ability to accept camera-ready works (already formatted and to be published as is)
- Other:

Do you have any additional feedback to give us on this group of questions? Also, if you have decided to skip any of the above, please let us know why.

Please write your answer here:

Under which type of license do you plan on publishing?

📌 Check all that apply

Please choose **all** that apply:

- All rights reserved ("traditional" copyright clause)
- Creative Commons Attribution (CC BY)
- Creative Commons Attribution + Share Alike (CC BY-SA)
- Creative Commons Attribution + Non-commercial (CC BY-NC)
- Creative Commons Attribution + Non-commercial + Share Alike (CC BY-NC-SA)
- Creative Commons Attribution + No Derivatives (CC BY-ND)
- Creative Commons Attribution + Non-commercial + No Derivatives (CC BY-NC-ND)
- GNU General Public License (GNU GPL)
- GNU Lesser General Public License (GNU LGPL)
- GNU Affero General Public License (GNU AGPL)
- GNU Free Documentation License (GNU FDL)

Other:

Imagine using *Pathfinder* to look for a publishing venue: how important is it for this tool to display information on the different copyright policies?

Please choose **only one** of the following:

- 1
 2
 3
 4
 5

Please use this scale from 1 to 5, where 1 = "not at all important" and 5 = "extremely important"

Do you have any additional feedback to give us on this group of questions? Also, if you have decided to skip any of the above, please let us know why.

Please write your answer here:

Under which of these models would you publish?

🗨 Check all that apply

Please choose **all** that apply:

- closed access (traditional model, readers pay for access)
- open access option in a subscription-based publication (so called "hybrid journals")
- open access with publication fee to be paid upfront (Article/Book Processing Charge)
- open access without a publication fee
- open access with embargo
- open access without embargo
- Other:

Imagine using the *Pathfinder* to look for a publishing venue:
how important is it for this tool to display information on each
publishers' policy regarding open access?

Please choose **only one** of the following:

- 1
- 2
- 3
- 4
- 5

Please use this scale from 1 to 5, where 1 = "not at all important" and 5 = "extremely important"

Do you have any additional feedback to give us on this group of questions? Also, if you have decided to skip any of the above, please let us know why.

Please write your answer here:

Which of these identifiers do you plan to use in relation to future publications?

i Check all that apply

Please choose **all** that apply:

- Digital Object Identifier (DOI)
- Other Handle System protocols
- International Standard Book Number (ISBN)
- International Standard Serial Number (ISSN)
- Uniform Resource Name (URN)
- Open Researcher and Contributor ID (ORCID)

Other:

Imagine using the *Pathfinder* to look for a publishing venue: how important is it for this tool to display information on each publishers' use of standard identifiers?

Please choose **only one** of the following:

- 1
- 2
- 3
- 4
- 5

Please use this scale from 1 to 5, where 1 = "not at all important" and 5 = "extremely important"

Do you have any additional feedback to give us on this group of questions? Also, if you have decided to skip any of the above, please let us know why.

Please write your answer here:

Which of these long-term preservation strategies would you want/need to implement?

📌 Check all that apply

Please choose **all** that apply:

- legal deposit
- submission to long-time preservation services such as Portico, LOCKSS, CLOCKSS
- archiving of the published work in an open repository, institutional or subject-specific
- archiving of the published work in a close repository, institutional or subject-specific
- archiving of any primary sources embedded in your work (audiovisual material, statistical data, etc.) in an institutional or subject-specific repository

Other:

Do you consider it important to comply with the so called FAIR principles, making primary data and publication metadata Findable, Accessible, Interoperable and Re-usable?

Please choose **only one** of the following:

- 1
- 2
- 3
- 4
- 5

Please use this scale from 1 to 5, where 1 = "not at all important" and 5 = "extremely important"

Imagine using the *Pathfinder* to look for a publishing venue: how important is it for this tool to display information on the archiving and long-term preservation strategies of publishers?

Please choose **only one** of the following:

- 1
- 2
- 3
- 4
- 5

Please use this scale from 1 to 5, where 1 = "not at all important" and 5 = "extremely important"

Do you have any additional feedback to give us on this group of questions? Also, if you have decided to skip any of the above, please let us know why.

Please write your answer here:

Which dissemination and marketing strategies do you want/need the publisher to implement in relation to your work?

🗨️ Check all that apply

Please choose **all** that apply:

- provide a number of complimentary printed copies for authors, reviewers, etc.
- provide a number of complimentary printed copies to libraries
- provide a number of complimentary printed copies to bookshops
- organise or take parts in events (e.g. book launches, conferences) and provide marketing materials (e.g. leaflets)
- have an existing network of contacts for the promotion of published works
- distribute to University libraries in the relevant field (e.g. through subscriptions)
- disseminate metadata to commercial and non-commercial databases and catalogues (e.g. DOAB, JISC KB, OCLC/Worldcat, ProQuest KB, Ebsco KB)
- disseminate full-text digital version to commercial and non-commercial platforms (e.g. JSTOR, Ebscohost, Elib, ProQuest, OAPEN, OpenEdition)
- market the publication on social media
- easy sharing through social networks
- Other:

Imagine using the *Pathfinder* to look for a publishing venue: how important is it for this tool to display information on the publishers' dissemination and marketing strategies?

Please choose **only one** of the following:

- 1
- 2
- 3
- 4
- 5

Please use this scale from 1 to 5, where 1 = "not at all important" and 5 = "extremely important"

Do you have any additional feedback to give us on this group of questions? Also, if you have decided to skip any of the above, please let us know why.

Please write your answer here:

Which statistics and impact measures relating to your work would you be interested in?

🗨 Check all that apply

Please choose **all** that apply:

- statistics about how much the work has been accessed/downloaded
- statistics about how much the work has been cited
- altmetrics and/or other measures of impact
- measuring impact at the international or national level (e.g. Impact Factor, but also national publication classification systems)
- indexing in services such as Scopus, WoSCC, ERIH Plus, Google Scholar, DOAB, DOAJ, etc.

Other:

Imagine using the *Pathfinder* to look for a publishing venue: how important is it for this tool to display information on if and how publishers measure the readership and impact of the works they publish?

Please choose **only one** of the following:

- 1
- 2
- 3
- 4
- 5

Please use this scale from 1 to 5, where 1 = "not at all important" and 5 = "extremely important"

Do you have any additional feedback to give us on this group of questions? Also, if you have decided to skip any of the above, please let us know why.

Please write your answer here:

Which of these would be of interest to you and your scholarly project? If you think of something else, please let us know.

🗨 Check all that apply

Please choose **all** that apply:

- receiving royalties
- possibility to export bibliographic citations
- a version that can be publicly annotated
- a recommendation service for readers

Other:

Do you have any additional feedback to give us on this question? Also, if you have decided to skip it, please let us know why.

Please write your answer here:

If you had to pay to publish your scholarly content, do you think you would be able to get funding through your institution (if you are affiliated to one)?

❗ Choose one of the following answers

Please choose **only one** of the following:

- Yes, enough to cover publishing costs
- Yes, partial funding
- No

Would there likely be any conditions?

Only answer this question if the following conditions are met:

Answer was 'Yes, enough to cover publishing costs' or 'Yes, partial funding' at question '40 [Q30]' (If you had to pay to publish your scholarly content, do you think you would be able to get funding through your institution (if you are affiliated to one)?)

Please write your answer here:

If you had to pay to publish your scholarly content, do you think you would be able to get funding outside of your institution (if you are affiliated to one)?

❗ Choose one of the following answers

Please choose **only one** of the following:

- Yes, enough to cover publishing costs
- Yes, partial funding
- No

Would there likely be any conditions?

Only answer this question if the following conditions are met:

Answer was 'Yes, enough to cover publishing costs' or 'Yes, partial funding' at question '42 [Q31]' (If you had to pay to publish your scholarly content, do you think you would be able to get funding outside of your institution (if you are affiliated to one)?)

Please write your answer here:

Would you need help in looking and applying for funding?

❗ Choose one of the following answers

Please choose **only one** of the following:

- Yes
- No

Would a publication fee put you off from publishing in open access?

❗ Choose one of the following answers

Please choose **only one** of the following:

Yes

No

Imagine using the *Pathfinder* to look for a publishing venue: how important is it for this tool to display information on how publishing costs are covered?

Please choose **only one** of the following:

1

2

3

4

5

Please use this scale from 1 to 5, where 1 = "not at all important" and 5 = "extremely important"

Do you have any additional feedback to give us on this group of questions? Also, if you have decided to skip any of the above, please let us know why.

Please write your answer here:

What would you use the *Pathfinder* for?

*

📌 Check all that apply

Please choose **all** that apply:

- I want to write an academic work and I want to know about available (collaborative) authoring tools
- I have a manuscript ready and I need copyediting and/or translation services
- I am writing an academic work and I want to know how I can fund its publication
- I am looking for a journal/publisher for the article I have written/I am writing
- I am looking for a publisher for the monograph I have written/I am writing
- I want to make my academic work immediately available to the public (e.g. self-publish)
- I am the editor in chief of a new journal and I am looking for a publisher
- I am the editor in chief of a journal and I want to disseminate it online
- I am the editor in chief of a journal and I want to disseminate it open access
- I want to establish a new journal in my field
- I want to flip a journal from subscription-based to open access
- I am looking for a new press to take on the journal I am the editor of
- I want to establish a new book series
- I am the editor of a new book series and I am looking for a publisher
- I am the editor of a book series and I want to disseminate it online
- I am the editor of a book series and I want to disseminate it open access
- I am looking for a new press to take on the book series I am the editor of
- I want to establish a new academic press
- I want to establish (even temporarily) a peer-review process (e.g. in organising a conference)
- I want to publish the proceedings of a conference
- I want to become a reviewer in my field
- I want to make my published text available for online annotation
- I need my published work to be indexed by relevant citation services (e.g. for promotion/career advancement)
- I have made my work available online and I need to assign a ISBN and /or DOI to it
- Other:

Do you have any additional feedback to give us on this topic or on any other touched in this survey?

Please write your answer here:

Thank you very much for taking the time to respond to our questions, we appreciate it immensely. If you have previously agreed to it, we may get back in touch with you again to clarify or delve deeper into some of your answers, if we feel it is important for the development of the *Pathfinder*.

Again, thanks for your cooperation and for your time!

30.04.2020 – 15:41

Submit your survey.

Thank you for completing this survey.

DRAFT