

# Communication Strategy and Toolkit

**DELIVERABLE 8.1**

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

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## Abstract

The OPERAS-PLUS Communication Strategy and Toolkit describes the communication goals and objectives of the project and wider OPERAS Research Infrastructure, as well as outlines the activities and tools that will be used to achieve them. It provides a framework for consistent and effective communication across all channels and stakeholders. The strategy includes messaging, audience analysis, channel selection, and measurement and evaluation criteria. The toolkit, on the other hand, provides specific templates, guidelines, and resources for implementing the strategy. Overall, this Communication Strategy and Toolkit is essential for ensuring that all communication efforts align with the goals and effectively reach their target audience.



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## Executive summary

This Communication Strategy is a guideline for all communication activities and dissemination measures of the OPERAS Research Infrastructure (RI) and delineates how communication and dissemination can contribute to exploitation. The strategic aim is to increase awareness and visibility of OPERAS RI, the products/services it is developing and its activities.

This strategy mainly addresses external communication for the OPERAS RI such as raising awareness of the RI, increasing understanding of the RI's operations, and fostering international collaboration by connecting different scientific communities, as well as societal and economic actors, on an international level. It shall raise awareness of the services catalogue for the different stakeholders and attract users for the services. Overall, it aims to promote innovations in the Social Sciences and Humanities (SSH) by fostering the OPERAS Innovation Lab, advocating for Open Science and the Diamond Open Access Model and communicating about EU-funding.

The OPERAS list of audiences and stakeholders include both internal stakeholders such as OPERAS Members and services providers, stakeholders covering both internal and external such as strategy projects consortia (OPERAS-PLUS, TRIPLE, COESO, DIAMAS, PALOMERA, CRAFT-OA etc.) and national communities, and targets external stakeholders including but not limited to SSH researchers, Research policymakers/European Commission/European Member States and Associated Countries, Publishers, Service providers (e.g. infrastructure providers etc.) and Libraries and librarians, amongst others.

To address and engage with the different stakeholders, the consortium developed a mixture of communication and dissemination measures as workshops (engage internal and external), a conference, publications, blog posts, policy briefs, the annual report of the RI, a quarterly newsletter, the website and social media presence, mainly via Twitter and LinkedIn.

The next steps will be the project milestone Monitoring & Impact Assessment Framework due in month 8 and the deliverable D8.2 – Impact monitoring dashboard due in month 12 are the next steps to define the monitoring of the communication and exploitation results of the OPERAS RI. The KPIs are defined in a table that is updated on a monthly basis and that helps WP8 monitor not only the performance of the communication channels, but of the events and public awareness of the project and RI.



# 1. Introduction

The OPERAS-PLUS Communication Strategy and Toolkit describes the communication goals and objectives of the project and wider OPERAS RI, as well as outlines the activities and tools that will be used to achieve them. It provides a framework for consistent and effective communication across all channels and stakeholders. The strategy includes messaging, audience analysis, channel selection, and measurement and evaluation criteria. The toolkit, on the other hand, provides specific templates, guidelines, and resources for implementing the strategy. Overall, this Communication Strategy and Toolkit is essential for ensuring that all communication efforts align with the goals and effectively reach their target audience.

Therefore, the structure and contents of this document is as follows:

- Section 1: introduces the document and its structure.
- Section 2: describes the communication strategy for both the project and OPERAS Research Infrastructure.
- Section 3: outlines the communication toolbox and assets such as the visual identity and style guide.
- Section 4: details the target audience and their needs.
- Section 5: covers all internal communication channels.
- Section 6: specifies the communication and dissemination measures including the various types of material and events.
- Section 7: outlines the external communication channels such as the website, blog and social media.
- Section 8: identifies some potential risks.
- Section 9: concludes the document along with some next steps.

# 2. Communication Strategy

This Communication Strategy is a guideline for all communication activities and dissemination measures of the OPERAS Research Infrastructure (RI) and delineates how communication and dissemination can contribute to exploitation.

This communication strategy is focused on the OPERAS RI mainly as the OPERAS-PLUS project supports the development of the OPERAS RI in its preparatory phase on its way towards the implementation as an ERIC (European Research Infrastructure Consortium). Therefore, this strategy is focused on the final objectives of the infrastructure as a whole.

The strategic aim is to increase awareness and visibility of OPERAS RI, the products/services it is developing and its activities. This strategy mainly addresses external communication for the OPERAS RI. It focuses on

- Raising awareness of the RI
- Increasing understanding of the RI's operations



- Fostering international collaboration by connecting different scientific communities, as well as societal and economic actors, on an international level
- Raising awareness of the services catalogue for the different stakeholders and to attract users for the services
- Promoting innovations in the Social Sciences and Humanities (SSH) by fostering the OPERAS Innovation Lab
- Advocating for Open Science and the Diamond Open Access Model
- Communicating about EU-Funding.

One objective of the OPERAS-PLUS project is to maximise OPERAS' impact in the European Research Area (ERA) and at the international level by extending it beyond its current scope and onboarding new members and countries in the infrastructure. It is important to empower all OPERAS national nodes, members and project participants to present OPERAS on different occasions by providing a toolbox and manuals. The approach of Work Package 8 (WP 8) is to structure communication approaches and open the access and use of the OPERAS' communication channels to a growing audience and allow the different projects related to OPERAS to extend their outreach within the growing OPERAS community.

This strategy will work to strengthen the acceptance and commitment to the infrastructure internally and externally; however, it will mainly define the communication channels and guide on how the news and information can be distributed. The internal communication structure to engage the community will be defined by WP3 – “Member States and Associated Countries & Other OPERAS stakeholders engagement.”

### **For the project**

Regarding OPERAS-PLUS, WP8 is directly linked to the main organisational and administrative work package (WP1), as well as included in the Coordination Team of the Infrastructure itself. This means that communication is located alongside the main strategic decisions of the project and the infrastructure. This procedure is aligned with recommendations in the literature (see Peng & Litteljohn, 2001) on the importance of linking strategic implementation with communication measures. Although communication does not guarantee per se a good implementation, it is “embedded in the processes of organising, affecting the effectiveness and efficiency of these processes and, in turn, the process of strategy implementation”.<sup>1</sup>

OPERAS-PLUS is mainly dedicated to reinforcing and supporting OPERAS' services and the infrastructure as a whole; this means each WP focuses on different angles of the infrastructure, which are important to its future. One pillar of the project deals with the sustainability of the infrastructure, including the relations with stakeholders, the administrative preparation for the transition to an

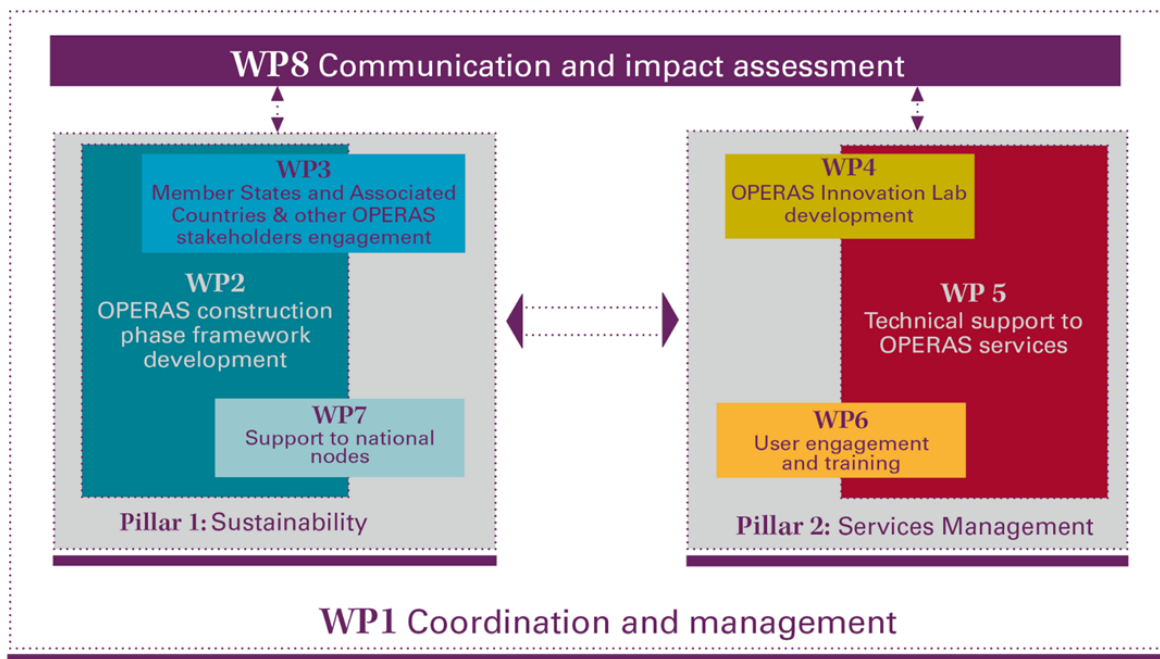
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<sup>1</sup> [Peng, W.](#) and [Litteljohn, D.](#) (2001), "Organisational communication and strategy implementation – a primary inquiry", [International Journal of Contemporary Hospitality Management](#), Vol. 13 No. 7, pp. 360–363. <https://doi.org/10.1108/EUM0000000006005>





ERIC and the support to the national nodes. The other pillar focuses on service management, giving technical support to the services and developing training and user engagement and the development of the OPERAS Innovation Lab.



**Figure 1: OPERAS-PLUS PERT chart**

Each one of these pillars and related WPs can benefit from the development of well-defined objectives, a sufficiently organised dissemination plan and a well-established list of stakeholders, linked to OPERAS services.

### For the Research Infrastructure

The communication strategy (and its subsequent implementation) will not only support the implementation of OPERAS services and community during the project but also help raise awareness and share knowledge about the infrastructure after the project is over. The communication strategy developed in this document should be implemented, tested and renewed during OPERAS-PLUS (with its update in the course of the project) and beyond. Creating, and evaluating the effectiveness of communication measures should turn into well-established procedures for the infrastructure. It targets not only the results of the project but includes and builds on the efforts done within the projects OPERAS participates (TRIPLE, COESO, CRAFT-OA, DIAMAS, OAeBU, PALOMERA, Skills4EOSC, and more) and it benefits from work done within predecessor projects OPERAS-D and OPERAS-P.

## 2.1. Topics of communication and structure

OPERAS is the European Research Infrastructure for the development of open scholarly communication in the Social Sciences and Humanities. Explaining what OPERAS is and linking all activities, members and participants is not an easy task, as it is a complex distributed construction. Therefore, it is important to explain



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first, what a distributed research infrastructure is and what the aims and offers of OPERAS are. We will show how stakeholders are linked to OPERAS and will clarify how the information will be disseminated.

The information on OPERAS's main components will be structured by the following categories: Research infrastructure, services, OPERAS Community: Special Interest Groups, National Communities, OPERAS Innovation Lab, FAIR support and implementation, and projects.

## 2.1.1. Research Infrastructure

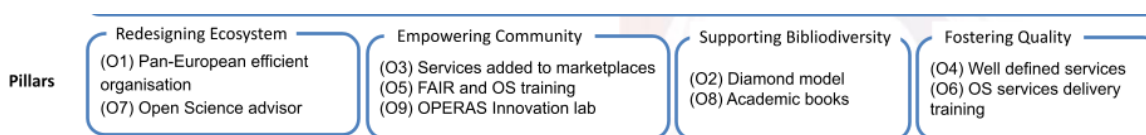
### **Definition, Mission and Vision**

OPERAS is the Research Infrastructure supporting open scholarly communication in the Social Sciences and Humanities (SSH) in the European Research Area. Its mission is to coordinate and federate resources in Europe to efficiently address the scholarly communication needs of European researchers in the field of SSH.

The OPERAS distributed research infrastructure is an organisation that enables the research community to use specific resources and services that are geographically scattered, thus providing coordination of actors, resources and support to the whole lifecycle of research in SSH in Europe.

Vision: OPERAS' aim is to make Open Science a reality for research in SSH and achieve a scholarly communication system where knowledge produced in the SSH benefits researchers, academics, students and more generally the whole society across Europe and worldwide, without barriers.

The infrastructure is organised into four pillars and nine objectives that are defined in its Strategic Plan:



**Figure 2: OPERAS pillars 2023–2025**

### **Tagline**

Although OPERAS messages can be directed to many different stakeholders (see about OPERAS stakeholders on “Target audiences” (section 4), the infrastructure has one main tagline: open scholarly communication in the European research area for social sciences and humanities.

### **The need for the OPERAS RI**

The European landscape in the SSH is poorly integrated. The fragmentation of the scholarly communication landscape across a multitude of small-size service providers prevents the research community from transitioning efficiently to the open science paradigm. New digital research methods demand cutting-edge scholarly communication technologies and services. On a national level, open scholarly communication in SSH has already witnessed tremendous

improvements. Yet, this development is only in the early stages on a trans-European scale, so a model for sustainable open scholarly communication in the SSH is greatly needed. OPERAS fills this gap through:

- Coordination
- Adoption of common standards in open scholarly communication practices
- Sharing research & development
- Identifying and adopting best practices
- Assessing sustainable economic models
- Advocating for Open Access in SSH
- Providing seamless services at a European and international level
- Supporting multilingualism and Diamond Open Access publishing.

### ***Core values of the infrastructure***

- **Collaboration and coordination:** We are dedicated to a bottom-up and distributed approach in community management. OPERAS coordinates the different stakeholders, i.e. researchers, research institutions, libraries, platforms, publishers and funders, on their scholarly communication activities.
- **Direct impact:** Robust services will directly enhance research outputs, particularly regarding their socio-economic impact, open access to high-quality content will facilitate the research process, and sharing of technologies and knowledge will noticeably improve scholarly communication infrastructures and initiatives.
- **Diversity and respect:** We encourage and welcome diversity of stakeholders, users, members and partners, and within the OPERAS consortium, including, but not limited to, gender, nationality, ethnicity, language, religion, and age. We treat all people, communities and cultures with dignity and respect.
- **Evolvement of research:** Information and studies on the impact of evaluative methods, metric systems, new business models and sustainability strategies will serve as drivers for new concepts on the impact and measurement of academic merit and will influence the way research is evaluated.
- **Inclusiveness:** We highly value inclusiveness by providing opportunities for our stakeholders, users, partners, members and the OPERAS consortium to be represented and heard across all activities.
- **Integrity and reliability:** We keep our commitments and carry out our work with the greatest accountability and responsibility.



In addition to defining what the infrastructure is and its values and objectives, it is of maximum importance to communicate effectively what OPERAS offers. The categories below encompass the main components that the infrastructure offers to its stakeholders. They will be the central topics and structure of the different information related to the RI and its projects.

Additionally, the topics of multilingualism and Diamond Open Access as important topics for the RI to deal with are highlighted.

## 2.1.2. Services

OPERAS develops a comprehensive ecosystem of scholarly communication services which address the specific needs of the research community at local and European levels. Each service is designed to pool, aggregate or federate existing resources from across Europe, to deliver a single access point to European researchers so that they can benefit from the full range of resources rather than being limited to only the local ones.

A brief summary of services is available on the OPERAS website.<sup>2</sup> The services are the first point of contact with OPERAS that the research community and the society have therefore, its importance needs to be tantamount to the infrastructure's daily communication.

## 2.1.3. OPERAS Community: Special Interest Groups

Special Interest Groups (SIGs) work collaboratively, share information, watch, and prepare projects on their topic. Each SIG works under the responsibility of a contact point who is, in most cases, an OPERAS' core member. Each contact point gathers and coordinates the participants of its SIG. Membership in the SIGs is open to all.<sup>3</sup>

## 2.1.4. National Communities (national nodes)

The national nodes of OPERAS are national contact points, also led by Executive Assembly members, that work on activities and results of OPERAS at the national level, helping to facilitate the delivery of OPERAS services and activities inside specific European countries, in their own language, and helping to grow and engage the community at the national scale.

Most countries have already started to build up national communities by organising workshops and building up communication channels. As part of the OPERAS-PLUS project, it is planned to further establish these national communities (more information about the nodes to be found in section 6.3).

## 2.1.5. OPERAS Innovation Lab

The OPERAS Innovation Lab will be a knowledge hub for the OPERAS community, providing up-to-date knowledge and guidance on innovative scholarly communication. It will do so by providing an overview of relevant practices, initiatives and projects, and targeted guidance for scholars seeking to

<sup>2</sup> OPERAS website, services page: <<https://operas-eu.org/services/>>.

<sup>3</sup> OPERAS website, special interest groups: <<https://operas-eu.org/special-interest-groups/>>.



disseminate their outputs innovatively. The task activities will be conducted through the Lab's website, a subsite of the OPERAS website, and consultation events (workshops and mentoring). It will establish the Lab's website, whose structure will allow for collecting and storing information on innovative outputs as well as on current research in that field. OPERAS-PLUS partners will contribute by providing case studies and research papers from their countries. This task will seek the Lab's work during external events or conferences, to facilitate a dialogue with the SSH or Digital Humanities community by featuring the Lab's work and gathering feedback.

The Innovation Lab will work as another important point of contact, especially for researchers who want to transition to Open Science and feel encouraged and supported. Communication on the Innovation Lab can help target researchers from the ERA.

### **2.1.6. FAIR support in the EOSC ecosystem**

OPERAS RI promotes and supports the adoption of the FAIR principles in the SSH, and more specifically in the open scholarly communication community. The FAIR principles are a set of recommendations to make any digital object Findable, Accessible, Interoperable and Reusable. OPERAS facilitates the adoption of such principles by the SSH community by contributing to projects, participating in networks, and providing training. The RI also implements the FAIR principles in its services dedicated to scholarly communication, ensuring that the publications, data, and metadata they produce are as FAIR as possible.

### **2.1.7. Projects**

To reach its aims and develop services, OPERAS participates in several projects. All projects are listed separately. The news from the different projects appear in the OPERAS communication channels but are always linked back to a project OPERAS participates in.

The projects help to mobilise a great set of OPERAS members to develop services and to promote the infrastructure in events such as conferences and workshops. The full list of current and past projects of OPERAS is frequently updated and can be found on the OPERAS website,<sup>4</sup> the main point of information for all stakeholders (see topic 5, Communication Channels).

As part of the strategy, it is important to link everything that is published with its role within OPERAS as a project working on a service i.e., so that stakeholders can link the information within the context of the OPERAS RI and its aims.

## **2.2. OPERAS-PLUS**

The OPERAS-PLUS project was conceived to help establish the path for the transition of OPERAS to an ERIC – European Research Infrastructure Consortium. The project will empower OPERAS to further:

- Strengthen its governance structure regarding financial, legal and human resources

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<sup>4</sup> OPERAS website, projects page: <<https://operas-eu.org/projects/>>.



- Support the network of national nodes and their national activities
- Develop the services portfolio providing both the required technology and a monitoring system for services development
- Maximise OPERAS' impact in the ERA and at the international level by extending it beyond its current scope and onboarding new members and countries in the infrastructure.

### 3. Communication Toolbox and Assets

To open communication for all consortium partners and members of the different Assemblies a toolbox is provided offering different materials on an accessible drive containing OPERAS and OPERAS-PLUS materials. Most of them are open to be used by all OPERAS members and will be accessible via the OPERAS website. OPERAS actively invites members to present OPERAS on different occasions. The toolbox will be continuously adapted over the course of the project.

#### 3.1. Visual Identity

The visual identity of the infrastructure was updated towards its new identity of an infrastructure on its way to becoming an ERIC.

##### 3.1.1. Infrastructure

The revision of the visual identity of the RI has been delegated to ZRC ZASU, a consortium partner and core member of OPERAS. In the process of development, a completely new design was reconsidered. Options to change:



**Figure 3: OPERAS first draft redesign**

But the consortium decided to update the logo slightly to fit into a congruent visual identity, as it already provides impact, is well known and already successfully branded. On the basis of the old RI design identity prepared by the design agency “Oktober Kommunikationsdesign” in 2017 as part of the OPERAS-D project, an update was made<sup>5</sup>. The fonts have been changed with open fonts to strengthen collaboration and sharing. All materials are available to work with different tools (e.g. Microsoft Office, Google Doc) and the logo and design elements as well in print and web files and adaptable InDesign and Illustrator files. The design manual describes the different elements and how to

<sup>5</sup> <http://oktober.de/>



use them. The design manual will be updated over the course of the project, if more materials are added.

Logo:



The OPERAS logo, depending on the use and size, can be used with or without the tagline. As OPERAS has already been branded for several years, the idea is to work without a tagline for most materials. How it has to be added exactly, is described in the design manual.

Positive version for monochrome material:



With tagline:



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

**Colours:** OPERAS has a brand new and very rich colour palette that includes 2 main colours and 7 secondary colours. The brand’s primary colours are red and purple. Black and white may also be used. The secondary colours are used to make the visual communication materials more vibrant, dynamic and also to brighten up the otherwise rather dark primary colour palette. The use of a wide range of colours communicates diversity, while the bright colours symbolise openness. They should never in any way dominate the overall appearance.



Red  
CMYK 7/100/70/30  
RGB 170/10/45  
HEX #A60E33



Purple  
CMYK 50/90/0/40  
RGB 105/35/100  
HEX #622166



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**Triangles:** The main design elements are triangles, forming different geometric mosaics. Triangles were derived from the arrow used in the logo and they symbolise forward thinking, development and future orientation. All of the colours from the colour palette can be included or used interchangeably. A mosaic represents diversity, connections and networking; furthermore, it is never really finished, therefore it communicates openness and expansion as well.

The adaption of the colour palette allows it to work with different design elements and background colours, which can especially be useful for attention on social media channels. They are as well shown and used in the slides for presentation:

**Powerpoint:**







**Flyer:** A DinA4 3-folded flyer was prepared to present the OPERAS RI and its services at conferences and events and will be shared via Zenodo as well:

**OPERAS is a non-for-profit organisation, led by a 11-member Executive Assembly and gathers more than 50 members.**

This project has received funding under the Horizon Europe Framework Programme under Grant Agreement No 101079608. OPERAS received funding under the Horizon Europe and Horizon 2020 programmes and from its members [www.operas.eu.org/funding-information](http://www.operas.eu.org/funding-information)

**OPERAS coordinates services, practices and technology across main actors in the Social Sciences and Humanities scholarly communication in Europe.**

OPERAS Executive Assembly Members:

**OPERAS**

**Open scholarly communication for social sciences and humanities**

OPERAS is the Research Infrastructure supporting open scholarly communication in the Social Sciences and Humanities (SSH) in the European Research Area. Its mission is to coordinate and federate resources in Europe to efficiently address the scholarly communication needs of European researchers in the field of SSH.

- Austria
- Belgium
- Brazil
- Canada
- Croatia
- France
- Georgia
- Germany
- Greece
- Italy
- Luxembourg
- Netherlands
- Norway
- Poland
- Portugal
- Serbia
- Slovenia
- Switzerland
- Sweden
- United Kingdom



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### OPERAS Services

OPERAS develops a comprehensive ecosystem of scholarly communication services which address the specific needs of the research community at local and European levels. Each service is designed to pool, aggregate or federate existing resources from across Europe, to deliver European researchers with a single access point from where they can benefit from the full range of resources rather than being limited to the local ones.

#### Analytics Services



##### Metrics

- ▶ Single access point to metrics related to Open Access monographs
- ▶ Collects usage and impact metrics related to Open Access monographs from many
- ▶ Different sources and allows for their access, display and analysis
- ▶ Helps book authors to demonstrate the impact of their work
- ▶ For: researchers, libraries, universities, publishers

Metrics.operas-eu.org (Beta, full release beginning of 2023)

#### Discovery Services



##### GoTriple

- ▶ Innovative multilingual discovery platform for social sciences and humanities
- ▶ Central access point for publications and research data, project descriptions and researcher profiles in eleven European languages
- ▶ Textual and visual search, annotation, social network, recommender, and crowdfunding services
- ▶ For: researchers, librarians, universities, companies, policymakers, civil societies actors

gotriple.eu (Full release)

##### Pathfinder

- ▶ Single access portal to discover scholarly communication services provided by OPERAS members



- ▶ Search wizard to find a fitting publisher or service provider, services catalogue
- ▶ For: researchers, publishers, service providers

pathfinder.unit.it (Alpha, full release in 2023)

#### Quality Assurance Services



##### PRISM

- ▶ Peer Review Information Service For Monographs
- ▶ Gives publishers the opportunity to display information about their peer review procedures in a standardised way
- ▶ Enables inclusion of peer review information as part of the book's metadata
- ▶ Builds trust in OA book publishing by improving transparency around the quality assurance process
- ▶ For: researchers, citizens, libraries, universities, publishers, service providers

Doabooks.org (Full release)

#### Research for Society Services



##### vera

- ▶ Collaboration Platform where a diverse set of actors can build Social Science and Humanities research projects together
- ▶ Includes collaborative tools, funding opportunities, and matchmaking services
- ▶ For: researchers, citizen scientists, funding agencies, companies, policy makers, public authorities, etc

Currently in beta, full release in 2023

##### hypotheses

- ▶ A platform for Humanities and Social Sciences research blogs
- ▶ Interactive platform between researchers and the society at large developing the practices of academic blogging
- ▶ For: researchers, universities and all other types of engaged stakeholders, civil societies actors, companies, policy makers

hypotheses.org (Full release)

### Get involved

#### OPERAS Innovation Lab

The OPERAS Innovation Lab is a knowledge hub for the OPERAS community, providing up-to-date knowledge and guidance on innovative scholarly communication. It offers an overview of relevant practices, initiatives and projects and targeted guidance for scholars seeking to disseminate their outputs innovatively.

#### Special Interest Groups

- ▶ OPERAS community gathers around specific topics to exchange knowledge. In the Special Interest Groups OPERAS members work collaboratively, share information, watch, and prepare projects on their topic.
- ▶ Advocacy – Advocating for open scholarly communication in the Social Sciences and Humanities
- ▶ Best Practices – Identifying the most accepted best practices regarding academic publishing
- ▶ Common Standards and FAIR Principles – Tracing the standards at the platform and inter-platform levels, and ensuring compliance with the FAIR principles
- ▶ Multilingualism – Supporting researchers and institutions who want to continue publishing in their own language
- ▶ Open Access Books Network – Initiative bringing together a global community of individuals interested in open access book publishing
- ▶ Open Access Business Models – Looking into business models currently used by open access publishers
- ▶ Tools and Platforms – Examining how tools and platforms development could benefit the open scholarly communication community in the SSH

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## Design for social media posts:



### 3.1.2. Project OPERAS-Plus

#### Project Logo:



#### And in black and white:



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# OPERAS PLUS

The OPERAS-PLUS logo should only be used together with the funding information described below.

## Project Powerpoint slides:



### 3.1.3. Funding Information

Information on funding will be presented in banners and other OPERAS materials with the European Union flag close to the logo of OPERAS-PLUS:



“This project has received funding under Grant Agreement No 101079608. Views and opinions expressed are however those of the author(s) only. The European Commission is not responsible for any use that may be made of the information it contains.”

On material and communications for the OPERAS RI, the funding logo will be used with a link to a page on the website with detailed funding information, to list as well the funding of other EU projects:



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OPERAS received funding under the Horizon Europe and Horizon 2020 programmes and its members<sup>6</sup>.

### 3.2. Language-related aspects and style guide

As the RI communication is provided by a lot of partners, mainly working from non-English speaking countries, we agreed on English as Lingua Franca for communication purposes. To guarantee, all different stakeholder groups are able to understand the communicated message, it is important to avoid acronyms in the descriptions and be attentive to other recommendations to facilitate communication:

- **No Acronyms in communication:** Avoid using acronyms in communications, especially those that are specific to research infrastructures such as RI. If you need to convey these terms, always spell them out and explain what they mean.  
  
Use mainstream language and avoid jargon and technical terms, unless you are directly addressing a specialised audience.
- Preference for **British English spelling** over the spelling norms of other varieties of English.
- **Use of gender-sensitive language**, i.e. use non-discriminatory language, make gender visible when it is relevant for communication and not visible when it is irrelevant (useful guidelines are the “Toolkit on Gender-sensitive Communication” by the European Institute for Gender Equality<sup>7</sup> and the UN guidelines for gender-inclusive language in English<sup>8</sup>).
- **Tailoring the communication** (wording, style, complexity) **to the respective audience**. When communicating with a wider, non-specialist target audience, ensure accessibility by keeping the message short and simple. This can be done by adhering to the following principles and by making use of **story-telling techniques** to convey messages whenever possible.
- To easier align citations in different documents, WP8 agreed in alignment with other OPERAS’ projects on the citation style Chicago Manual of Styles, Author Date<sup>9</sup>.

### 3.3. Terms and Glossary

To align the different terms that are used on the different communication channels, a WP8 task force is working on a glossary for OPERAS, that defines terms as they are commonly used. Some projects are defining terms as well (DIAMAS, PALOMERA), and it is planned to align these terms. It does not imply

<sup>6</sup> [www.operas-eu.org/funding-information](http://www.operas-eu.org/funding-information)

<sup>7</sup> European Institute for Gender Equality (EIGE) (2019). Toolkit on Gender-sensitive Communication. A resource for policymakers, legislators, media and anyone else with an interest in making their communication more inclusive.  
[https://eige.europa.eu/sites/default/files/20193925\\_mh0119609enn\\_pdf.pdf](https://eige.europa.eu/sites/default/files/20193925_mh0119609enn_pdf.pdf).

<sup>8</sup> <https://www.un.org/en/gender-inclusive-language/guidelines.shtml>

<sup>9</sup> [https://www.chicagomanualofstyle.org/tools\\_citationguide/citation-guide-2.html](https://www.chicagomanualofstyle.org/tools_citationguide/citation-guide-2.html)



that the terms have to be used in each publication in the same manner, but they can be used as a path to align communication and vocabularies. The glossary will be updated continuously and published on the OPERAS website, where it can be commented via the pundit tool.

### 3.4. Manuals and Support

As the RI is continuously growing, there is a need to open up the communication channels inviting contributions from different partners. Therefore, the communication team is working on a list of manuals to easily open the OPERAS Blog, the event calendar on the OPERAS website and the social media channels via a shared Hootsuite account. A list of agreed hashtags to be used is part of the list of manuals.

## 4. Target Audience

We distribute the target audiences between internal and external target groups. The present communication strategy defines mainly external communication but lists all target audiences, to better define and understand communication approaches.

As a first step, it is important to define the stakeholders of OPERAS RI. A stakeholder is any individual or organisation having an interest in a system or its characteristics (ISO/IEC/IEEE 15288, 2015).

OPERAS list of audiences and stakeholders include:

#### Internal stakeholders

- OPERAS Members
  - General Assembly
  - Special Interest Group members
  - The Scientific Advisory Committee
  - The Executive Assembly
- OPERAS services providers.

#### Internal and external

- Projects consortia (OPERAS-PLUS, TRIPLE, COESO, DIAMAS, PALOMERA, CRAFT-OA etc.)
- National communities
- Users:
  - a) Direct (directly interacting with services)
    - Primary (end-user)
    - Secondary (support or training)
  - b) Indirect (uses the output of a system).



## External stakeholders

- SSH researchers
- Research policymakers/European Commission/European Member States and Associated Countries
- Publishers
- Research performing organisations
- Scholarly communication service providers (e.g. infrastructure providers etc.)
- Libraries and librarians
- European Research Infrastructures/other SSH ESFRIs (European Strategy Forum on Research Infrastructures)/E-Infrastructures
- Research funding organisations, funders
- Civil society organisations
- Public/Broader audience/citizens.

## Customers/Users of services

- SSH Researchers
- Authors
- Editors, Editorial Managers
- Publishers
- Libraries
- Service Providers
- Translators

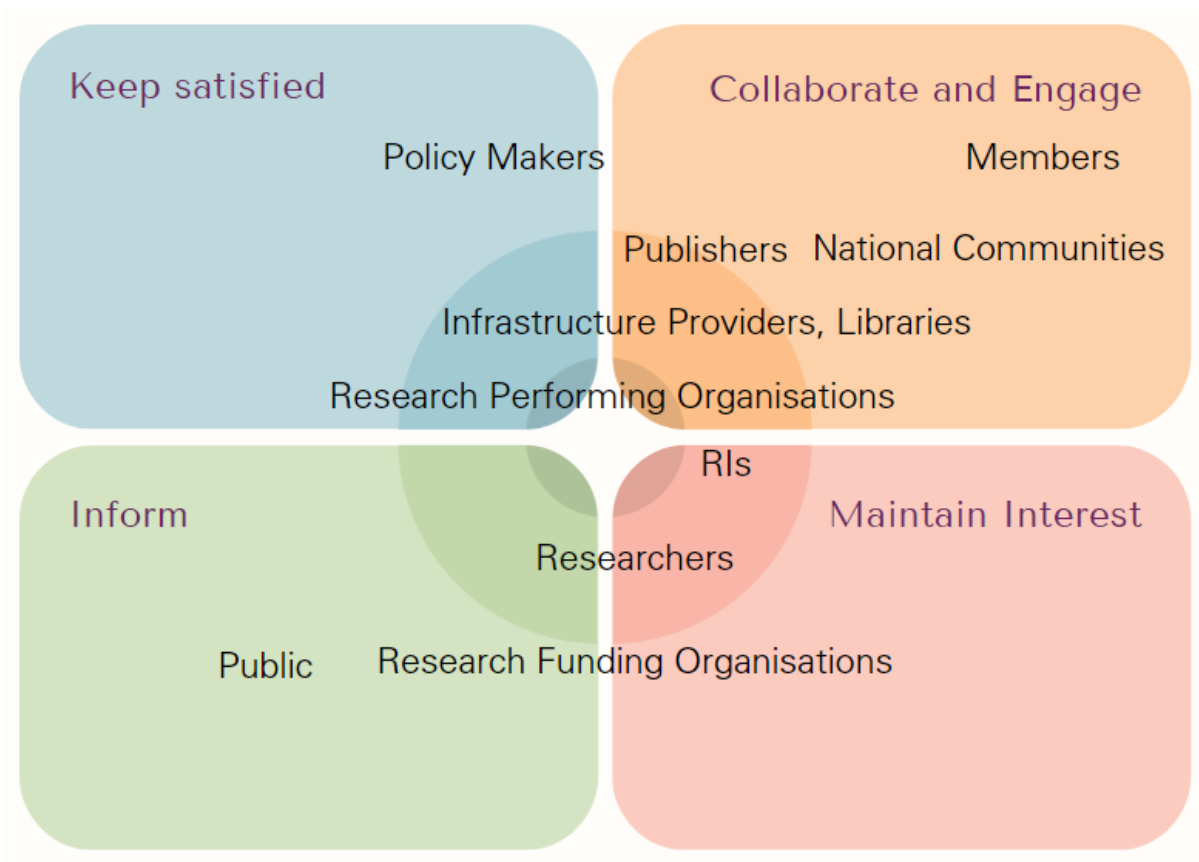
The internal target audiences are the audiences we collaborate and engage with the most, as the Power and Interest Approach shows below. We used the approach to better analyse and understand the interest. To deliver the services, it is important to include users in the analysis of target groups. A user, in the narrowest definition, is a person who interacts with the system (ISO 9241-210, 2019). Namely, all users are stakeholders but not all stakeholders are users. To create a good service, it is absolutely essential that the design should be guided by the needs of the primary users, without it being compromised by the preferences, opinions or prejudices of other stakeholder groups. This distribution will help to better address the communication actions.

To better understand which stakeholder groups we want to engage with, we used a Power Interest Approach (RI-VIS D4.2 Communication Strategy)<sup>10</sup>. Stakeholders are plotted on these axes to prioritise communication efforts. The general objective is to move stakeholders towards the right-hand side of the plot and towards the top and it helped to better understand, with which groups we mainly intend to collaborate.

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<sup>10</sup> Vincenz-Donnelly, Lisa, Pieruschka, Roland, & Haley, Natalie. (2020). RI-VIS D4.2 Communication Strategy. Zenodo. <https://doi.org/10.5281/zenodo.4090929>, p. 4.





**Figure 4: Power and Interest Approach for OPERAS**

### **4.1. Target audience and their needs**

As a complex infrastructure, with many different services and activities, OPERAS has the challenge of addressing the added value for all its stakeholders. One important reminder is to tailor the message for each of the particular stakeholders in order to emphasise the value of OPERAS to each stakeholder's needs.

In the following table, we provide the main messages and topics tailored to each group of OPERAS stakeholders. It will be further developed during the project and will be aligned with the OPERAS implementation plan 2023 to 2025.



Target audience	Objectives of the communication	Key Messages related to their needs
External stakeholders		
SSH researchers	<ul style="list-style-type: none"> <li>● Showcase the relevant services for researchers</li> <li>● Attract and address as potential users/testers of the services</li> <li>● Measure needs and input</li> <li>● Provide better scholarly communication solutions</li> <li>● Raise awareness for EU funding</li> </ul>	<p>OPERAS supports SSH research and open scholarly communication by supporting collaboration in the ERA. OPERAS addresses the needs of the research community by developing services and doing advocacy for SSH towards open science practices.</p> <p>We enable multilingual research and foster collaboration.</p>
Research Policy Makers	<ul style="list-style-type: none"> <li>● Convince decision makers and receive political support</li> <li>● Provide policies</li> <li>● Prove the benefits and the necessity of OPERAS to the European research landscape</li> <li>● Maintain and increase support from current member states</li> <li>● Attract new member states</li> <li>● Advocacy for SSH specific topics</li> </ul>	<p>SSH research is important to solve societal challenges. OPERAS has the impact to coordinate the fragmented SSH landscape for open scholarly communication. OPERAS' necessity has been proven by demand from researchers and other stakeholders.</p> <p>OPERAS policy briefs support good decision-making for open scholarly communication topics.</p> <p>Institutional publishing is a vital part of a healthy and diverse publishing landscape.</p> <p>Selling points:</p> <ol style="list-style-type: none"> <li>1. OPERAS increases the quality, visibility and impact of research in both Humanities and Social Sciences by providing relevant and community-based open scholarly communication services.</li> </ol>





		<p>2. OPERAS is the major pan-European actor to support ethical publishing and scientific integrity of open scholarly publishing.</p>
Publishers	<ul style="list-style-type: none"> <li>Disseminate the provision of respective services</li> <li>Share knowledge about Open Access business models</li> <li>Attract potential members</li> <li>Connect and engage small publishers, in particular</li> <li>Provide support for OA publishing</li> </ul>	<p>OPERAS supports publishers with innovative services. Participating in the infrastructure is a way of evolving and making a better transition to Open Science.</p>
Libraries	<ul style="list-style-type: none"> <li>Attract potential members</li> <li>Disseminate the provision of services</li> <li>Gain greater visibility as an important Research Infrastructure for the SSH</li> <li>Be recognised as a big actor for the support of Diamond Open Access</li> </ul>	<p>OPERAS develops services to facilitate open scholarly communication.  OPERAS supports and facilitates networking in the field of SSH and open scholarly communication.  You can get involved!  We enable multilingual research.</p>
Research Performing organisations	<ul style="list-style-type: none"> <li>Attract potential members</li> <li>Disseminate the provision of services</li> <li>Be recognised as a big actor for the support of Diamond Open Access</li> </ul>	<p>Connecting with OPERAS and being a part of the infrastructure adds value to your institution.</p>
Infrastructure service providers	<ul style="list-style-type: none"> <li>Attract new members</li> <li>Disseminate the provision of services</li> <li>Be recognised as a big factor for the support of Diamond Open Access</li> </ul>	<p>OPERAS develops services to facilitate open scholarly communication.  You can get involved! We are an active community to work with.  Connecting with OPERAS and being a part of the infrastructure adds value to your institution.</p>



		We enable multilingual research.
Research funding organisations/ Funders	<ul style="list-style-type: none"> <li>• Receive funding</li> <li>• Being recognised as an important actor in SSH research coordination</li> </ul>	<p>Open scholarly communication infrastructures must be funded in a consistent way.</p> <p>OPERAS is the Research Infrastructure supporting open scholarly communication.</p> <p>OPERAS' mission is to coordinate and federate resources in Europe to efficiently address the scholarly communication needs of European researchers in the field of SSH.</p>
Infrastructures	<ul style="list-style-type: none"> <li>• Prove the benefits and the necessity of OPERAS to the European research landscape</li> <li>• Disseminate the provision of services</li> </ul>	<p>OPERAS is the Research Infrastructure supporting open scholarly communication.</p> <p>OPERAS is a getaway for the SSH scholarly communication community to the EOSC.</p> <p>OPERAS aims at collaborating with other infrastructures and does not intend to duplicate services or areas of activities.</p> <p>OPERAS is a community-led Research Infrastructure. You can get involved!</p>
Society/Socio-economic actors/citizens	<ul style="list-style-type: none"> <li>• Promote public interest in SSH research and open science</li> <li>• Empower citizens to find and use SSH research results easily and without barrier</li> <li>• Raise awareness for EU Funding</li> </ul>	<p>OPERAS supports and facilitates networking with other socio-economic actors and SSH research (data, publications, researchers).</p> <p>OPERAS is the European Research Infrastructure opening the access to SSH research.</p> <p>Open Science practices in the SSH field in Europe are important for society to face misinformation.</p>
SMEs	<ul style="list-style-type: none"> <li>• Support collaborations between different actors</li> </ul>	OPERAS fosters collaborations.



<p>Press and Media</p>	<ul style="list-style-type: none"> <li>• Place OPERAS as an important Research Infrastructure for open scholarly communication in Europe</li> <li>• Raise awareness for the importance of Open Science and SSH</li> <li>• Raise awareness for EU-Funding</li> </ul>	<p>OPERAS is the European Research Infrastructure opening the access to SSH research. Open Science practices in the SSH field in Europe are important for society to face misinformation.</p>
<p><b>Target audience</b></p>	<p><b>Objectives of the communication</b></p>	<p><b>Key Messages related to their needs</b></p>
<p>Internal stakeholders</p>		
<p>OPERAS members</p>	<ul style="list-style-type: none"> <li>• Ensure an efficient sharing of information across the different groups and uptake of project results</li> <li>• Engage community in the process and activities for OPERAS becoming an ERIC</li> </ul>	<p>OPERAS is a scholar-led Research Infrastructure with an open governance structure. Develop with us the open scholarly communication landscape. Connecting with OPERAS and being a part of the infrastructure adds value to your institution.</p>
<p>OPERAS projects partners and other projects consortia</p>	<ul style="list-style-type: none"> <li>• Ensure an efficient sharing of information across the different groups and uptake of project results</li> <li>• Engage community</li> </ul>	<p>OPERAS is a scholar-led Research Infrastructure with an open governance structure. Develop with us the open scholarly communication landscape. Connecting with OPERAS and being a part of the infrastructure adds value to your institution.</p>
<p>Executive Assembly Members</p>	<ul style="list-style-type: none"> <li>• Dashboard of activities of the OPERAS different bodies and assemblies</li> </ul>	<p>Harmonising internal communication and mapping stakeholders' engagement so that the Executive Assembly will have an overview of all the activities carried out by the other bodies and assemblies to make informed decisions.</p>



<p>Scientific advisory committee</p>	<ul style="list-style-type: none"> <li>• Assign precise tasks to the SAC in order to improve its engagement and ensure that OPERAS takes benefit from the expertise gathered in the Committee</li> <li>• Engage the SAC members with a continuous reviewing activity on the different components of OPERAS, in particular:             <ul style="list-style-type: none"> <li>○ Special Interest Groups</li> <li>○ Services</li> <li>○ Projects</li> </ul> </li> </ul>	<p>Develop with us the open scholarly communication landscape.</p> <p>We need your expertise to develop the scholarly communication landscape together.</p> <p>OPERAS provides communication tools and framework to deliberate on topics related to services and strategy and to monitor OPERAS activities.</p>
<p>Member states</p>	<ul style="list-style-type: none"> <li>• GA to be informed of OPERAS activities via the Annual Report</li> <li>• Develop draft statutes in preparation for the ERIC</li> <li>• Strengthen commitment of existing member states in OPERAS General Assembly</li> <li>• Onboarding new countries in the General Assembly</li> </ul>	<p>OPERAS has the value to coordinate open scholarly communication in the ERA for Social Sciences and Humanities.</p> <p>OPERAS monitors its Key Exploitable Results to continuously improve its services for the different stakeholders.</p> <p>OPERAS fosters diversity in scholarly communication</p> <p>Institutional publishing is a vital part of a healthy and diverse publishing landscape.</p>

**Table 1: Target audience and key messages**

Inside OPERAS-PLUS, the role of each stakeholder is being defined via Work Package 6 – User engagement and training. This will be the basis to better address the target groups more specifically with their needs. This table is the starting point to develop precisely aligned communication material for the different stakeholder groups like factsheets to explain the benefits, marketing campaigns to gain users and different video tutorials for some of the services.



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Target Group/roles	Matching Service	User profile (gains)	Key message/value proposition	Result
SSH Researchers	Metrics	Want to see metrics for their work and its impact	Can give a comprehensive view of your research impact	Examples of well-communicated impact; Provides value for career opportunities
	VERA	Want to develop projects with engaged stakeholders. (Citizen Science/Participatory Research)	Find your research partner: Research project partner matchmaking, Coordinate your research project with a fitting project coordination tools. Find funding for your participatory research project.	Connecting research with society. Run participatory projects addressing societal challenges; engage with citizen scientists/engaged stakeholders
	PRISM	Wants to read and find easily certified publications	Brings together peer-reviewed publications	More impact for Open Access publications
	GoTriple	Want to access research and publications in several languages and disciplines, display their expertise and get in touch with colleagues/experts	Enhancing discoverability of SSH research, allowing researchers to connect easily to each other, serving as a single access point, thereby reducing a number of everyday tools needed	Ensuring visibility of SSH researcher's work throughout & disciplines/languages, enabling them to connect
Authors	PRISM	Ability to obtain information about the publisher's quality assurance process prior to choosing a publisher	Make it possible to see details of the peer review process that a publisher has applied to a given work.	Choose a publisher based on knowledge of their peer review process(es)



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	Pathfinder	Informing authors about the possible available publishing and editorial services. Suggesting publishing options (outside Pathfinder) if they are working on articles or books.	Transparency in services, Suggesting useful resources to authors looking for publishing options.	Presenting authors options they couldn't be aware of.
	GoTriple	Need impact of publications for career options	Makes your publication easily findable in 11 languages, opens your publication to an international audience	More visibility for publications.
Editors, Editorial Managers	Pathfinder	reduce time spent in the search for providers of editorial services	A time-saving workflow that allows Editors to get more value out of the services they look for, and find effective solutions to services they want to offload; Find solutions for communication/publishing needs	Get satisfactory answers with a user-friendly tool
	GoTriple	Single SSH entry point to access research data such as publications, books, projects and researchers' profiles.	Access SSH research data in a multilingual and interdisciplinary environment	Gain in visibility, enhance your collaboration potential at a European level and across disciplines and benefits from innovative services such open annotation tool, data visualisations, get small projects funded
Publishers	Metrics	Want to provide metrics to indicate impact	Can demonstrate effectiveness of distribution, impact	Implemented and running on publishers' websites
	PRISM	Providing publishers with the opportunity of displaying	Increasing trust in OA book publishing and supporting transparency around	Publishers can show details of their peer review process(es) which is



		information about their peer review procedures	the quality assurance process of academic book publishing	important in gaining the trust of the scholarly community.
	Pathfinder	Make finding editorial professionals (reviewer, translators.) easier; Make finding technical professionals (graphic design, IT etc.) easier; Find solutions to promote the journal/editorial work, solutions for articles indexing and metrics/impact analysis and support for publishing content in Open Access.	Time and cost saving. Making Open Access options more easily accessible	Get satisfactory answers with a user friendly tool
	GoTriple	Increase the visibility of publications	Share your data on an European and open access environment	Can demonstrate relevance of your publications and gain and get a broader audience
Libraries	Metrics	Want metrics for publications they host	Can demonstrate the effectiveness of distribution, impact. Best practices for statistics etc.	View/download metrics can be fed into the central metrics database (for participating libraries) The Metric widget can be installed in the library's system to display metrics. Improved onboarding documentation is produced.
	PRISM	Monitoring Faculty authors (bibliometric analyses)	Libraries can find out which peer review process(es) have been applied to works by their faculty members.	Increase confidence in the quality of a faculty's research outputs.



	GoTriple	Offer a free and open access SSH discovery platform to their users	The gateway to knowledge on culture and society	Enlarge the SSH domain access and position ourselves as a main actor of open science
	VERA	Resource for researchers and society members to do research together	Find each other, build your project, find funding	Increase the societal impact of research.
Translators	Translation	Need a diverse set of tools to support translations	Suite of tools to support translations	Engage and connect with authors and publishers. Facilitate translation review by the community.
	GoTriple	Benefit from 11 languages covered by the platform	Access SSH concepts and keywords in 11 different languages and collaboration opportunities to share experience on multilingualism research	Facilitate your translation work

**Table 2: Target audience of services and key messages**



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## 5. Internal Communication OPERAS-PLUS

The communication channels of the OPERAS RI are divided into internal and external. The internal communication channels include different mailing lists, for reaching the different groups inside the infrastructure, such as the General Assembly, the Executive Assembly, the Scientific Advisory Board and the more general mailing lists for the whole infrastructure and the specific mailing lists for the projects (Find more about the internal organisation and communication structure in the D3.1 – Report on the activities of OPERAS’ bodies of WP3 later in the project). How project data are stored, can be found in detail in the Data Management Plan prepared by WP1. The following part describes the internal communication for the OPERAS-PLUS project.

### 5.1. Mailing lists

Mailing lists are commonly used to share important information and to organise the daily work of the project. One of these lists is directed to the whole consortium, and the other lists are tailored for each WP. The infrastructure uses mailing lists as well as a tool to share information. There is one central mailing list addressing all OPERAS members, that is used to inform the members about current events, surveys and news. It is coordinated by the OPERAS Community Coordinator and the Communication Manager but shall be the place to share information for all members.

Outside the project consortium and in the infrastructure as a whole, there are also mailing lists specifically directed to the Assemblies, Special Interest Groups and to the Scientific Advisory Board.

An internal survey requesting the OPERAS Members' information level and habits conducted in October and November 2022 brought the results that most of them rely on the information sent via the mailing lists. Therefore, it is planned to share more information via the general OPERAS mailing list.

### 5.2. Mattermost

Mattermost is an open-source, self-hostable online chat service with file sharing, search, and integrations. It is designed as an internal chat for organisations and companies<sup>11</sup> and hosted by consortium member Huma-Num.

OPERAS members are advised to include themselves in Mattermost groups to exchange daily information and share quick messages. Currently, there are channels dedicated to the whole consortium and for the OPERAS-PLUS WPs. People can use it as well to send direct messages to colleagues. Mattermost works basically as an instant message platform for OPERAS teams and its projects.

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<sup>11</sup> Taken from Wikipedia. Available in: <https://en.wikipedia.org/wiki/Mattermost>.

### 5.3. Confluence Space

Confluence is developed by Atlassian software company<sup>12</sup> and works as a knowledge management and collaborative software for organisations and companies. OPERAS uses it as a knowledge hub, for internal information management and structuration.

For the OPERAS-PLUS project, a Confluence space was created to allow an easy finding of project information, as well as of WP tasks, project tools, and to follow updates on each of the project deliverables.



Figure 5: Image: Home page of OPERAS-PLUS on Confluence

Overview

WP1 Coordination and Management (MWS)	WP2 OPERAS construction phase framework development (OPERAS)	WP3 Member States/Associated Countries & other OPERAS stakeholders engagement (Jisc)	WP4 OPERAS Innovation Lab development (IBL PAN)
<p>Task 1.1 – Administrative, financial, and legal management (Lead: MWV)</p> <p>Task 1.2 – Day-to-day management (Lead: MWV)</p> <p>Task 1.3 – Reporting and administration (Lead: MWV)</p> <p>Task 1.4 – Data Management Plan (Lead: MWV)</p>	<p>Task 2.1 – Governance of OPERAS (Leader: OPERAS)</p> <p>Task 2.2 – Legal and financial framework (Leader: OPERAS)</p> <p>Task 2.3 – Human resources (Leader: OPERAS)</p> <p>Task 2.4 – Strategy implementation plan (Leader: CNRS)</p>	<p>Task 3.1 – Support to the Special Interest Groups and the Assembly of Commons (Leader: CNRS)</p> <p>Task 3.2 – Support to the General Assembly (Leader: OPERAS)</p> <p>Task 3.3 – Support to the Scientific Advisory Committee (Leader: CNRS)</p> <p>Task 3.4 – Support to the Executive Assembly (Leader: Jisc)</p>	<p>Task 4.1 – Innovation observatory (Leader: IBL PAN)</p> <p>Task 4.2 – Support for innovative outputs (Leader: IBL PAN)</p> <p>Task 4.3 – Evaluation framework for innovative outputs (Leader: DARIAH)</p>
WP5 Technical support to OPERAS services (OPERAS)	WP6 User engagement and training (UNIZD)	WP7 Support to national nodes (UC)	WP8 Communication and impact assessment nodes (MWS)
<p>Task 5.1 – Structuration of OPERAS portfolio and catalogues of services (Lead: OPERAS)</p> <p>Task 5.2 – Technical development for OPERAS Metrics Service (Lead: UP)</p> <p>Task 5.3 – Technical development for OPERAS Publishing Service Portal (Lead: Net7)</p> <p>Task 5.4 – Technical development for OPERAS Certification Service (Lead: OAPEN)</p> <p>Task 5.5 – Design study for OPERAS Translation Service (Lead: UC)</p>	<p>Task 6.1 – Identification of relevant services and targeted user groups (Leader: OPERAS)</p> <p>Task 6.2 – Developing common methodological framework for achieving user-centred quality objectives of OPERAS services (Leader: UNIZD)</p> <p>Task 6.3 – Implementation of the developed framework on selected services (Leader: UNIZD)</p> <p>Task 6.4 – OPERAS essential skills and training provision (Leader: CNRS)</p>	<p>Task 7.1 – Support in the building of OPERAS national nodes (Leader: UC)</p> <p>Task 7.2 – Aligning the governance between the national nodes and the central hub (Leader: OPERAS)</p> <p>Task 7.3 – Connecting OPERAS with other national and international Social Sciences and Humanities nodes (Leader: IBL PAN)</p>	<p>Task 8.1 – Communication and outreach (Leader: MWS)</p> <p>Task 8.2 – Impact monitoring and assessment (Leader: MWS)</p> <p>Task 8.3 – Dissemination and exploitation (Leader: OPERAS)</p>

Quickstart

Figure 6: Overview of WPs on OPERAS-PLUS Confluence page

It is used as well as a central organisation hub, to define the different procedures for working routines in the OPERAS RI.

<sup>12</sup> [https://en.wikipedia.org/wiki/Confluence\\_\(software\)](https://en.wikipedia.org/wiki/Confluence_(software)).

## 6. Communication and Dissemination Measures

The OPERAS-PLUS consortium has identified a series of main dissemination measures to support the project outreach. These dissemination measures will be public and openly accessible. They will focus on the topics defined under point 2.1 in this document.

### 6.1. Communication and Dissemination Matrix

The following table describes the dissemination measures aimed for promoting the infrastructure and its activities planned for the time of the OPERAS-PLUS project that are defined more in detail below:

Target audience	Means of dissemination		
	Publications and other dissemination material	Public events/ presentations	Communication Channels
SSH researchers	Scientific publications, Blog posts, OPERAS Innovation Lab Observatory Website Reports	OPERAS Conference, Workshops	OPERAS Website, Twitter, OPERAS Lab Observatory Website, Instagram, Youtube, marketing campaign
Research Policymakers/ Member States	Policy Briefs, OPERAS Innovation Lab Observatory, FAIR Training, Annual Report, Fact Sheet	Small Workshops dedicated to introduce the policy briefs	OPERAS Website, Twitter, LinkedIn, press releases,
Publishers	Flyer, Policy briefs, Factsheet on services, Blog posts	OPERAS Conference, presentations at events	OPERAS Website, Twitter, LinkedIn, Youtube
Libraries and librarians	Flyer, Policy briefs, Factsheet on services, blog posts, scientific publications	OPERAS Conference, presentations at events, workshops	OPERAS Website, mailing lists, Twitter, LinkedIn, Youtube, press releases
Research Performing Organisations	Flyer, scientific publications, factsheets on services, blog posts	Conference, presentations at external events, workshops	Website, OPERAS Innovation Lab Observatory Website, LinkedIn,

			Twitter, press releases,
Infrastructure service providers	Flyer, scientific publications, factsheets on services, Blog posts	Conferences and public events, workshops	OPERAS Website, mailing lists, press releases, Twitter, LinkedIn
Research funding organisations/ Funders	Policy Briefs, Scientific Publications, Innovation Lab Observatory, Annual Report	Conferences and public events, Workshops	Website, Press releases, LinkedIn, Twitter
Society/Socio-economic actors/citizens	Blog Posts		Website, Instagram, Twitter, Youtube

**Table 3: Communication and Dissemination Matrix**

## 6.2. Scientific publications and Zenodo

Scientific articles on the project, its objectives, workflows and results are published in journals mainly dedicated to the Social Sciences and Humanities (SSH) research communities, but also in professional channels relevant to service providers, librarians, policy and Open Science officers and other media to increase the circulation.

Zenodo<sup>13</sup> is a “general-purpose open-access repository” for research data and publications that we use to deposit and disseminate project outputs such as deliverables, conference and research papers, posters, and presentations to make them publicly available under an open licence, preferably CC-BY. On the platform, they receive a permanent identifier DOI. Additional material includes public info materials such as flyers, posters, infographics and presentations.

All OPERAS-PLUS publications are assigned to the Zenodo community: “OPERAS: open scholarly communication in the European research area for social sciences and humanities” with the identifier “operaseu”. The community includes publications from projects OPERAS participates in and from the national nodes as well. Part of the manuals are guidelines on how to consistently add metadata to our documents. For instance, we list the lead author and co-authors as “authors”, but not reviewers and proofreaders (who are, however, mentioned on the documents themselves). ORCID (Open Researcher Contributor Identification) IDs are added if available. WP8 has build a task force to

## 6.3. National Communities

In several countries within the OPERAS Executive Assembly members, approaches to implementing national nodes are arising. National nodes play a

<sup>13</sup> <https://zenodo.org/>



pivotal role in establishing a connection point outside the OPERAS community, in promoting a proximity relation with local communities, helping to identify needs, provide services and training at a national level. They are in a decisive position to find a balanced solution for safeguarding national languages as fully scientific valid modes of expression while promoting them on the international level. In this sense, national nodes are important for aggregating existing approaches and resources from the national community, contributing at a European level to OPERAS. On the other side, it is also relevant to systematically connect relevant national stakeholders in individual countries. Furthermore, national nodes are especially important to coordinate and link these approaches and raise awareness of what is being developed at a national level by disseminating results in the national language.

Some of the groups are already well established, such as the OPERAS-GER (Germany) node and the OPERAS-PL (Poland). The central OPERAS communication and coordination team provides support to better coordinate the national dissemination measures by organising exchange meetings on a regular basis. WP7 in OPERAS-PLUS is dedicated to providing support for their better development. Depending on their capacities the nodes participate more in the dissemination of OPERAS results by:

- Providing workshops and training introducing OPERAS, the OPERAS services to research performing organisations, libraries and librarians, infrastructure providers and SSH researchers on a national level and in the respective national language
- Disseminating OPERAS events and results via national dissemination channels (mailing lists i.e.) and press releases in national languages
- Finding users for the services.

## **6.4. Projects consortia communication and dissemination**

To foster engagement and include the stakeholders of the different OPERAS-PLUS partners, the whole consortium is asked to share press releases and further news and results in the individual languages and communities.

OPERAS links its communication and dissemination efforts with the projects it is participating in, in order to extend the exploitation efforts (as mentioned under section 4). These projects will enable exploitation and foster engagement within the different consortia beyond the OPERAS-PLUS consortium and OPERAS members.

## **6.5. Planned Actions**

### ***Policy Briefs***

A policy brief is a short document that advocates for a particular position or objectively describes a policy issue and the options or advice available. Different policy briefs are planned over the course of the project that brings together results of the different projects (OPERAS-PLUS, COESO, TRIPLE, PALOMERA,



DIAMAS, Skills4EOSC) and that shall support the advocacy approaches in the projects mentioned.

- OPERAS within the SSH ESFRIs/infrastructure landscape (May 2023)
- Diamond Open Access (September 2023)
- Multilingualism (October 2023)
- Services for Research Evaluation (2024)
- Connecting Research and Society (2024).

### ***Scientific Conferences and external events***

WP8 will organise one international conference in the second half of the OPERAS-PLUS project, presenting the project outcomes to an international audience of different stakeholders and will be linked with the Assembly of the Commons (a meeting for all OPERAS ordinary members). The first results of the OPERAS-PLUS project will be presented and discussed to further improve them over the course of the project. An open call will make sure to assemble innovations in the field of open scholarly communication will be presented.

OPERAS will as well present at different international conferences, addressing the different stakeholder groups (e.g. Digital Humanities Annual Conference<sup>14</sup>, PUBMET, Open Access Scholarly Publishers Association (OASPA), OpenScience, OpenScience FAIR, Munin Conference, Open Archives Initiative (OAI), EuroScience Open Forum (ESOF), and more) and on smaller workshops on national and international levels. This will be done by the whole consortium.

### ***Workshops***

Over the course of the project different workshops are planned to engage and inform stakeholders:

- Consultation events and workshops by the OPERAS Innovation Lab (WP4)
- Workshops to introduce the services to potential users (WP8 and WP5)
- Workshops to introduce the policy briefs (WP8)
- Workshops with the OPERAS Service providers (WP6).

The workshops on a national level will be defined in the National Nodes Roadmap provided by WP7.

### ***Blog posts, series***

Different blog series are planned over the course of the project to inform audiences:

- Blog Post once per month, accompanied by social media:
  - What is OPERAS? (Introducing as well the important topics as defined under 2.1)
  - Who is OPERAS?
- Blog posts to introduce the work of the Special Interest Groups

<sup>14</sup> I.e. <https://dh2022.adho.org/>





- Regular posts by different authors on “The road to FAIR” blog.

### **Marketing campaigns on social media for the different services**

Starting in the second year of the project, marketing campaigns to promote the services and raise the number of users on social media channels are planned. Details must be prepared in detail by analysis. They will be accompanied by video tutorials prepared from the second year of the project onwards.

One marketing campaign addressing researchers is planned by taking up results from the OPERAS Innovation Lab.

The table below briefly introduces the Key Performance Indicators (KPIs) to measure the success of the communication and dissemination measures.

<b>Channel / Engagement</b>	<b>Activity</b>	<b>Inform/engage</b>	<b>Target Groups</b>	<b>Key Performance Indicators (KPI)</b>	<b>Measure</b>
OPERAS website	Main access point for RI and project results, links to other engagements with an event calendar for the community	inform	All stakeholders defined before	# unique visitors	> 800/month
OPERAS blog	news, community posts, different series, i.e. from the Special Interest Groups	engage	all stakeholders	# of posts # unique visitors	> 15/year > 2.500/month
newsletter	news	inform	all stakeholders, but especially for OPERAS members	# of newsletters # of subscribers	> 3 times/year > 50 new/year > 500 subscribers
social media	Regular posting of relevant news	inform	community, all stakeholders	# tweets (incl. retweets) # twitter followers	>300/year > 30 new followers/month



Channel / Engagement	Activity	Inform/engage	Target Groups	Key Performance Indicators (KPI)	Measure	
The road to FAIR blog	regular posts on FAIR topics	engage	community	# of posts # of authors	> 20/year > 5	
Events	international conference face-to-face	engage	community, Special Interest Groups	# participants	> 120	
	Assembly of the Commons			# assemblies # participants	3 < 50	
	General Assembly			national ministries, supporting member	# assemblies # participants	6 < 120
	Virtual workshops			community, researchers, service provider, librarians, publishers, policymakers	#workshops internal and external # participants	< 50
Campaigns	Planned communication campaign on several channels	inform	Researchers, Research Performing Organisations, Librarians, Publishers	#campaigns	3	
Policy briefs	short papers to different topics	inform	national ministries, Social Sciences and Humanities research policymakers	# briefs	< 5	

**Table 4: KPIs to measure the success of the communication and dissemination measures**

## 7. Communication Channels

The main communication channels are the OPERAS website and the blog, which gather respectively the updated governance information and work of the infrastructure, and all kinds of news worth disseminating to the general public.





In addition to the website and the blog, OPERAS is active in social media – mainly Twitter and LinkedIn.

The external non-digital channels include materials shared in events, training and conferences, as well as a range of printed materials and scientific publications focused on the diverse activities of the OPERAS community.

The key objectives of the external channels can be summarised as follows:

- Raise more awareness of the infrastructure among all its stakeholders and potential stakeholders
- Explain what the infrastructure is, the services provided, the projects running and the people involved
- Promote events, publications and initiatives related to the infrastructure and its members
- Increase the network, reaching out to potential new members
- Increase the community's engagement and open the possibility for dialogue
- Keep the community updated about the latest actions of the infrastructure and its projects.

These objectives are complemented by the main messages tailored to the stakeholders, defined above on topic 3.1.



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Type	Channel	Primary Audience	Reach individual, local, national, international	Inclusivity	Average target frequency of communication	Management	Resourcing
Internal	E-Mail list: General Assembly	General Assembly, Coordination Team, Executive Assembly	Individuals	Excellent	Preparation of Meetings	Secretary General	Low
	Executive Assembly	Executive Assembly members	Individuals	Excellent	When needed	Coordinator	Low
	Scientific Advisory Board	Scientific Advisory Board members	Individuals	Excellent	When needed	Coordinator	Low
	OPERAS Mailing list	All members	Individuals	Excellent	When needed	Communication and Community Manager	Moderate
	OPERAS-PLUS WP mailing lists	Project consortium	Individuals	Excellent	When needed	Project Coordinator, Chief Technology Officer	Moderate
External	Newsletter	All stakeholders,	International	FAIR	quarterly	WP8	Moderate to high



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		mainly community					
Website	Events	Community	International	FAIR	ongoing	WP8	low
	Services	Community, all stakeholders	International	FAIR	monthly	WP8	low
	About/Governance	General public, all stakeholders, policymakers	International	FAIR	monthly	WP8	low
	News/Press	Public, Media, community	International	FAIR	ongoing	WP8	moderate
	SIGs	Community	International	FAIR	monthly	WP8	low
	Projects	Policymakers, community,	International	FAIR	monthly	WP8	low
Blog	News	Community, general public	Individuals	FAIR	weekly	WP8	moderate
	Dissemination of Results	Community, researchers, main stakeholders	Individuals	FAIR	monthly	WP8	moderate
Social Media	Twitter	Community, public, researchers	International	FAIR	daily	WP8	moderate



	LinkedIn	Community, public, companies / organisations	International, individuals	FAIR	weekly	WP8	moderate
	Instagram / Facebook	Students, young researchers	Individuals	FAIR	monthly	WP8	low
Meetings, Events, Workshops	Conference		Local, individuals	Good	one	WP8	high
	Workshops	Community and editors/editorial s teams, potential services users	Local, individuals, international	Good	When needed	WP4, WP5, WP6, WP8	high
	Presentations/ Posters	Researchers, policymakers, potential members	International, local	Good	When invited	consortium	moderate
Print Materials	Flyer	General public	local	Good	annually	WP8	moderate
	Annual Report	Members	local	Good	annually	WP8	high
	Policy Brief	Policy briefs, funders	local	FAIR	5 total	WP8	high

**Table 5: Table to define the effort and responsibilities of communication and dissemination channels and measures**



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## 7.1. OPERAS Website

The OPERAS website<sup>15</sup> is the main communication channel for the infrastructure. It encompasses information on the governance schema and legal entity, information on members and the different assemblies that constitute the infrastructure. In addition, the website brings together information on the Special Interest Groups, services, projects, news and events and the international partnerships of OPERAS.

The aim of the OPERAS website is to be the central reference to anyone in the general public and all stakeholders to find updated information about the infrastructure and its activities.

It is the main point for retrieving information about how OPERAS works and what are the services provided, besides being a point for following up on current and past projects. The structure of the website is designed to inform people who do not know what OPERAS is but as well informed ones. It is linked with the OPERAS blog to retrieve the latest news.

For the OPERAS-PLUS project, a subpage on the website was created<sup>16</sup>. The project with its objectives, consortium and funding information is introduced here. It offers a subpage with a list of deliverables and project results.

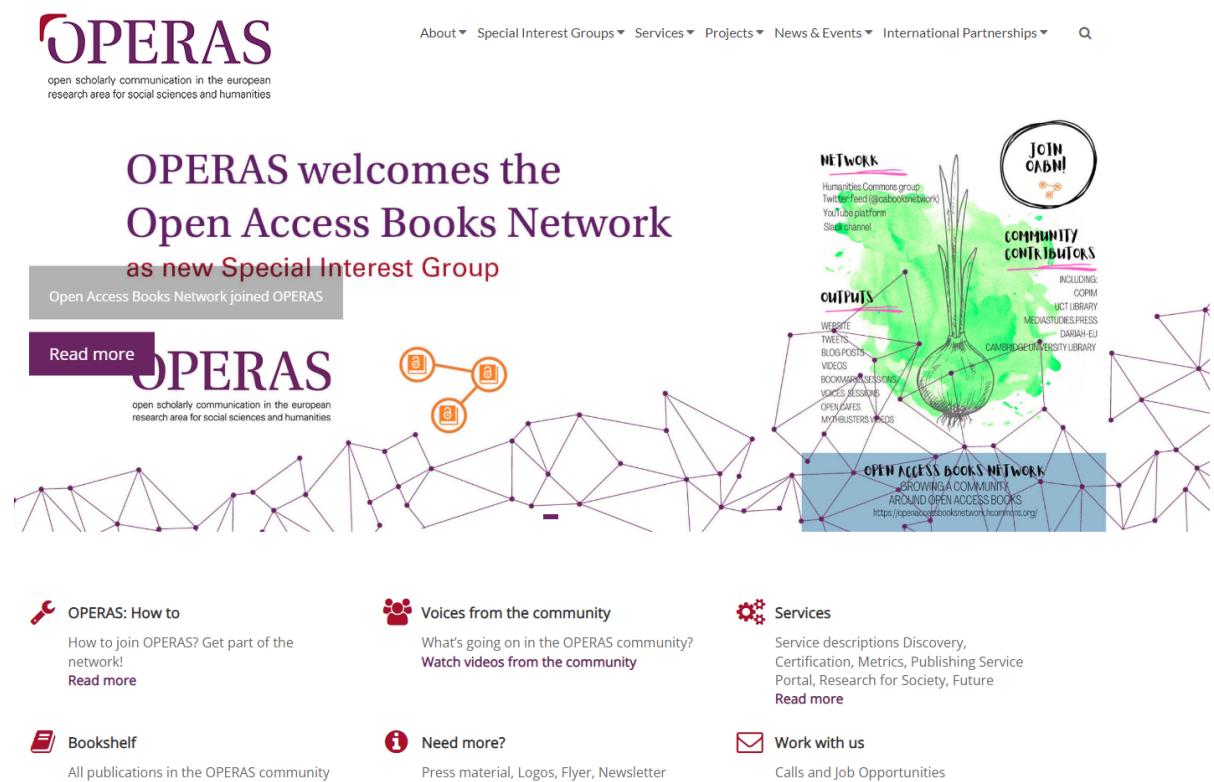


Figure 7: OPERAS website homepage

<sup>15</sup> OPERAS RI website: <[www.operas-eu.org](http://www.operas-eu.org)>

<sup>16</sup> Project Page OPERAS-PLUS: <<https://operas-eu.org/projects/operas-plus/>>



## 7.2. OPERAS Blog

Started as the first website of the project, the OPERAS blog is currently the first point where the main news of the infrastructure and members are disseminated.

The advantage of running a blog with its own URL on the Hypotheses platform<sup>17</sup>, in addition to the website, is that it is easier to expand the target audience than if the blog was embedded in the OPERAS website. Hypotheses offer a lot of community work within the research community. OPERAS can use this expanded target audience to reach more people with its communication work. As well it can help to spread the Hypotheses service of OPERAS.

Via the blog, the news is spread into other channels (social media and mailing lists). The blog includes a range of categories and feature series, such as the “Behind the Scenes” series from the TRIPLE project or the funding series. News on OPERAS’ projects and services are launched together on the blog and with the dissemination of press releases.

A new series is being planned on the blog in 2023: once per month, the blog will feature a series about “What is OPERAS? And who is OPERAS?” featuring the activities and the people involved.

The blog is updated at least twice a month, but the frequency of dissemination depends on new information coming to the infrastructure. This is one reason why in this communication strategy OPERAS plans to start new series focusing on specific components of the infrastructure such as the Special Interest Groups and the Innovation Lab. So the updates will be more organised regarding the schedule.

More information on the series and publications on the blog can be found in the Dissemination Measures section (section 6).

## 7.3. Social Media Channels

The different social media channels were chosen to address our different stakeholder groups and different communities in the diverse European research landscape. Social media channels allow the infrastructure to reach a broader audience than through more traditional dissemination activities.

To open the channels to be used by different members to spread their news, we use Hootsuite<sup>18</sup> to coordinate it centrally. As well, we are working on a living document with hashtags and tags to commonly share the knowledge and address bigger audiences.

To make use of the consortium and members to disseminate results we actively ask staff to share and retweet our posts and tweets with their followers.

The main goals of OPERAS’ social media are:

- Increase public awareness of the infrastructure, its services and results

<sup>17</sup> <https://operas.hypotheses.org/>

<sup>18</sup> <https://www.hootsuite.com/>



- Promote the different activities and news from each layer of the infrastructure
- Promote events, publications and conferences
- Guide the audience to the OPERAS website and Blog
- Engage the community of SSH researchers in Europe and globally
- Promote Open Science activities and Open Access in a global level
- Promote advocacy for Open Science in the SSH
- Disseminate KPIs from the services (X number of registered users on GoTriple, X number of projects supported via VERA, etc.) to better show the impact of OPERAS' activities.

The social media channels currently in use are:

### **Twitter**

Twitter is the main social media in use. OPERAS Twitter channel has 2,931 followers (February 2023) and more than 3,000 tweets have been posted since the beginning of the channel in 2017. It is the channel mostly used by OPERAS' main stakeholders like the OPERAS community, researchers, research policymakers, publishers, research performing organisations, scholarly communication service providers and more. The goals of the Twitter presence of OPERAS are to:

- Build a strong base of engaged followers
- Gain more attention for the OPERAS community
- Drive more traffic to the OPERAS blog and website
- Engage with user communities/Respond to queries
- Monitor and improve OPERAS' reputation
- Disseminate OPERAS main activities and relations with other infrastructures and actors in the European scale.

Tweets are mainly made about:

- Introducing the partners
- New blog posts
- Events attended/speeches
- Publications/research results
- Retweets of posts to show the community and their activities
- Retweets of projects OPERAS participates or direct tweets to present project results and news.

Advantages of using Twitter include:

- The possibility of posting quickly everything that is new and what is going on in the infrastructure



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- Engaging with other institutions and diverse stakeholders; to foster dialogue
- Retweets and tags with others and researchers, as well as public institutions, improve OPERAS communication impact.
- Guides most users to the OPERAS website and blog

## **LinkedIn**

The OPERAS channel on LinkedIn<sup>19</sup> gained more traction in 2022 and is an important channel to reach out to OPERAS' main stakeholders. As LinkedIn is a professional network, most of OPERAS' stakeholder groups are connected on this platform. It is developing as a more important channel to provide information to professionals but does not work as a vivid exchange place like Twitter. The infrastructure started with a profile and a company page in 2017. Even though the company page was intended to be the OPERAS LinkedIn channel and the page to be referred to by others, a lot of stakeholders used the profile to connect with OPERAS. The goal now is to build more engagement and followers on the company page and actively motivate the OPERAS' connections (connections 989, February 2023) to follow the company page (followers 647, February 2023).

This channel is mainly used for:

- Publishing about OPERAS' events
- Projects
- New blog post
- Disseminate news from services and staff.

Main advantages of using LinkedIn:

- Possibility to connect with institutions, besides researchers and other stakeholders
- Promote OPERAS services at an institutional level
- Gain more authority in a channel that is mainly focused on work-related themes, where the public directs attention to corporate discussions.
- Guides users to the OPERAS website and blog

## **YouTube**

The YouTube channel of the infrastructure has been used a few times to upload recordings of public events (workshops) and presentations from OPERAS' projects<sup>20</sup>. The aim during the duration of the project is to gather more videos in the channel and disseminate them via other social media of the infrastructure. Youtube is not the channel to preserve and archive videos, this will be done via Zenodo or repositories of consortium members, where a DOI is provided. But it is gaining more importance as a means of communication for the general public.

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<sup>19</sup> <https://www.linkedin.com/company/operas/>

<sup>20</sup> <https://www.youtube.com/@operas-eu>



## Instagram/Facebook

Facebook has a shrinking audience. The OPERAS' page has proved not to be the best for OPERAS' goals (221 followers, February 2023), but we keep it running on a lower level to use it for potential marketing campaigns and as it is still important as a place to reach out to researchers in some parts of Europe (i.e. Poland). In 2022, following some discussions inside the OPERAS Coordination Team, it was decided to try out an Instagram page to target a younger audience, especially early career researchers and students and to try to evoke dialogue (60 followers, February 2022).

One of the main advantages of this channel is the ease to disseminate videos and a focus on visual communication. OPERAS' page on Instagram features as well a LinkTree that redirects visitors to the most recent posts on blogs and related subjects such as projects and services.

During the second half of 2022, Instagram posts were replying to information from other social media. However, to reach a different audience and create more targeted messages for this channel, the strategy is being adapted for the year 2023 to highlight more of the staff and foster dialogue.

Since the main social media that drives attention to the infrastructure are Twitter and LinkedIn, efforts to Instagram have to be limited. Following recommendations from the Scientist Guide to Social Media<sup>21</sup>, the average effort for Instagram should be 5-10 minutes daily to weekly. In this sense, the WP8 team will align the communication efforts with partners, asking them to send material whenever they want to share their activities through images. A channel on Mattermost will be created for sending this kind of material.

In addition to the strategy for posts on the feed, OPERAS will use the Stories feature to organise information about projects, services and organisational information. After 24 hours online, the stories can be either archived or organised as Highlights on the front page. OPERAS will use the Highlights feature to show the main information on the services directly at the top of the front page.

## 7.4. Newsletter

The OPERAS newsletter<sup>22</sup> is delivered quarterly (February, May, August/September and November). It brings together the news from the infrastructure, events, updates from the services, the Innovation Lab projects and useful links for the community, ordered by the defined topics (chapter 2.1) and with a highlight of the most interesting topics. The newsletter is based on the input from the RI, the services and the different projects of the infrastructure, gathered 15 days before the sending.

The newsletter has, as of January 2023, a total of 387 subscribers gathered during the projects OPERAS-D and OPERAS-P, mainly from European countries. The list

<sup>21</sup> Available on:

[https://higherlogicdownload.s3.amazonaws.com/AGU/4a3ef5b4-2c08-4034-969e-44418547b340/UploadedImages/Microsite\\_Images/Sharing\\_Science/Tookits/Toolkit\\_-\\_Social\\_Media\\_Long.pdf](https://higherlogicdownload.s3.amazonaws.com/AGU/4a3ef5b4-2c08-4034-969e-44418547b340/UploadedImages/Microsite_Images/Sharing_Science/Tookits/Toolkit_-_Social_Media_Long.pdf). Accessed on January 30, 2023.

<sup>22</sup> <https://operas-eu.org/operas-newsletter>



of recipients contains OPERAS members as well as external stakeholders from different target groups. A GDPR-conformed registration with double-opt-in has been included..

## 8. Potential Risks

- **Risk:** Misalignment in Communication in regards to a fast-growing RI. As the infrastructure is growing fast, there is the risk of too little coordination of different information coming from far-reaching activities and projects.

**Reaction:** To better align communication approaches in the different projects and with the national nodes, a regularly organised meeting is established. To smoothen the use of social media channels, we are using Hootsuite to organise the posts on the different channels in a structured manner. And to avoid an information overload of different incoming topics, the communications teams sort the information by the defined topics.
- **Risk:** A communication crisis can be some form of misinformation or scandal, mostly linked with some way of disappointment in the audience that can lead to a loss of trust in the RI and outrage. This is the case when the main stakeholders believe in the crisis.

● **Reaction:** The strategy would be, to not act too fast and the aim would be to build trust in the RI again, to avoid harm to the brand and the RIs' services. So the first answer would be to go into dialogue with the stakeholders and bring as reliable information as possible, to build trust again and send the same message on all channels.
- **Risk:** Difficulties in coordinating all members. As the RI coordinates an international community of different stakeholder groups, it might happen to lose some.

● **Reaction:** Regular meetings are organised for the different Assemblies of OPERAS, some in-person. And a community manager addresses each member single for different topics. An internal survey to learn about the members' needs was sent out in September 2022 to learn which channels are used mainly and if they feel well informed and included.

## 9. Conclusions and Next Steps

The communication strategy was developed to define the methodology of OPERAS communication by defining the addressed stakeholders for the different purposes of the RI and the measures to address and engage these stakeholders. It measures the effort for the different communication and dissemination measures and responsibilities. It can serve as a reference document for OPERAS communication activities. It will be adapted to the cause of the project. A final version will be delivered in month 36

The project milestone Monitoring & Impact Assessment Framework due in month 8 and the deliverable D8.2 – Impact monitoring dashboard due in month 12 are the next steps to define the monitoring of the communication and exploitation results of the OPERAS RI. The KPIs are defined in a table that is updated on a



monthly basis and that helps WP8 monitor not only the performance of the communication channel, but of the events and public awareness of the project.



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