

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

# Roadmap for the Implementation of OPERAS national nodes

**OPERAS-PLUS D7.2**

Lorena Caliman, Delfim Leão  
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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

### Deliverable 7.2

## Roadmap for the Implementation of OPERAS national nodes

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<b>Authors</b>	: Lorena Caliman, Delfim Leão
<b>Contributors</b>	: Karla Avanço, Patrick Piel, Marlen Töpfer, Aleš Pogačnik, Magdalena Wnuck, Michael Kaiser, Jadranka Stojanovski, Nelson Ferreira, Graham Stone, Mirjam Blümm, Yannick Legré

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## Abstract

This document provides a first roadmap for the implementation of OPERAS national nodes, communities built with the aim of establishing a connection point to outside the OPERAS community, connecting relevant stakeholders in individual countries. The document defines a common approach to all 12 existing nodes for engaging communities and providing OPERAS services nationally, establishing some minimum requirements. An update of this initial document will be provided at M33 (May 2025).

This version has not yet been approved by the European project officer for OPERAS-PLUS.



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# 1. Vision

## 1.1 Why are OPERAS national nodes needed?

A national node is a key element in connecting OPERAS services with the varying needs and realities of the communities at the national level. National nodes are expected to tackle challenges and find solutions to different types of activities:

- a) Identification of needs, stakeholders and members
  - identifying specific needs at local and regional level, providing support and training to regional communities;
  - identifying national services and infrastructures, improving and/or establishing new collaborations, and advocating for inclusion in OPERAS;
  - identifying the national resources pertinent for the implementation of nodes and networks and encouraging the support of governments for their establishment;
  - collecting the needs of the national scientific community and finding aligned answers for them at a European level.
- b) Targeting of the needs
  - mapping and promoting the involvement of national stakeholders (service users, regulatory agencies, funders);
  - defining targeted solutions according to the needs of each region, and testing pilots on alternative models of organisation and implementation in order to reflect the difference of national/regional approaches;
  - addressing the national communities in an appropriate way and providing support and access to OPERAS (and the knowledge linked) on a low threshold of access;
  - presenting and making available the OPERAS services inside the national research landscape;
- c) Outreach and intermediation
  - boosting the outreach within each country: involving the national communities in congregating new members for OPERAS and in the global outreach framework;
  - facilitating interaction, at a national level, with the nodes of other existing infrastructures, and promoting their articulation at a European level, preventing duplication and stimulating cooperation and complementarity of action;
  - acting as the intermediary between OPERAS (the European level) and each national research landscape, connecting both levels and facilitating exchange, not only selectively (in form of selected institutions) but in a broader sense and continuously;



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As seen from the list above, OPERAS national nodes work as a point of multi-focal relations, in:

- defining the scope of OPERAS in relation to national nodes of other infrastructures;
- being a means of local implementation of OPERAS services and helping to identify potential new services;
- promoting multilingualism and bibliodiversity in scholarly communication;
- transferring the objectives and services of the infrastructure from the European level to the national level, and therefore primarily enhancing awareness of OPERAS in each country;
- contributing to the enhancement of the links between European research infrastructures and members of the national scientific landscapes in the SSH.

These relations are in current development and will be enhanced in the coming years of the implementation of OPERAS as an ERIC.

## **1.2 Connection to the OPERAS central hub**

The nodes must have a frequent exchange with the OPERAS central hub to inform about developments within the national community, regarding interesting services/tools/developments, and asking for news/info material to reuse. More details on how this exchange should be organised will come in the following sections.

The nodes are needed to co-build the strategy with the central hub in a back-and-forth manner. The central hub acts as a coordination body between the different nodes in order to guarantee a coherent approach and strategy. Indeed one of the most risky situations in a research infrastructure is the possibility to have more and more different approaches and less complementarity between the nodes which can act in an autonomous way as if they were not related to anything else. Strong and recurrent relations between the nodes and the central hub are necessary to avoid this risk and to secure the unity of the research infrastructure.

## 2. Strategy to implement the OPERAS National Nodes

### 2.1 What are the necessary steps to develop OPERAS national nodes?

This section deals with some basic, general steps to be organised on different levels to define requirements for the functioning of the nodes. To help this process, the WP7 team<sup>1</sup> organised a milestone meeting to kickstart ideas and share experiences.<sup>2</sup>

The steps and recommendations are organised in a list of topics:

- The nodes should have some requirements and best practices, although flexibility is welcome – since each node has a different context.
- National Node coordinators/representatives should meet at least six times a year with the National Nodes officer from OPERAS. This officer is the principal contact point who coordinates the sharing of information. This is very important, although there is no need to report on every step, once the national nodes should have enough autonomy. National nodes representatives would also benefit from participating in OPERAS conferences in order to bring their activities to a broader OPERAS public.
- Having a national deputy is a priority to be targeted, in all the cases when it's possible (normally, after funding availability). This person would have a stable position, with actual dedicated effort<sup>3</sup>, being able to provide a continuous communication flow inside the node and in exchange with the OPERAS hub.
- Communication flow (via mailing lists, blog posts and own social media channels) and regular events in the national community are priorities to make the node visible and keep it running.
- Being able to explain to the community what the nodes actually do is a way of approaching stakeholders. Researchers, in particular, have to be targeted and get practical and straightforward information about what the nodes have to offer them – such as services, training and research opportunities.
- Seize the opportunities for funding and use them to build competence.
- Get involved in existing networks, initiatives and working groups, attempting as well to organise joint events.

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<sup>1</sup> Work Package 7: work package of OPERAS-PLUS project dedicated to support the national nodes.

<sup>2</sup> The main list of contributions in this section was also possible thanks to the participation of Edward Gray, DARIAH Officer for National Coordination, who presented the DARIAH experience during the internal kick-off meeting of the OPERAS-PLUS WP7, on March 20, 2023, online.

<sup>3</sup> Having in mind that OPERAS is ongoing its transition to an ERIC, full FTEs may not be available for the nodes' deputy in a short period of time. For that, it could be established a minimum of 10% FTE as a basic requirement.



## 2.2 Focal points

From the previous experience of the prominent OPERAS national nodes<sup>4</sup>, the strategy of development for the national communities can be spread from four focal points/objectives:

- **1st:** Increasing Awareness – To raise awareness of OPERAS among the national scientific landscape.
- **2nd:** Networking – To connect with institutions, libraries, data centres etc. via events, personal contacts.
- **3rd:** Collection of needs – To understand the needs of the national (potential) partners.
- **4th:** Dissemination of the services and targeting of needs – To provide training and present services in a hands-on approach, focusing on attending to the needs of stakeholders and empowering them to be part of the Social Sciences and Humanities (SSH) Open Science community nationally.

## 3. Requirements

### What are the basic requirements to build a national node?

Defining the functioning of the national nodes requires organising its formal structure, something that is being done by the OPERAS-PLUS project<sup>5</sup> and organised inside this work package (7). Besides detailing the different types of requirements, some planning and formal setups must be in place – and can be further developed until the end of the project:

- The definition of a legal framework – this will be developed in task 7.2, led by OPERAS, which deals with the alignment of the governance between OPERAS and the nodes.
- The definition of a minimum teamwork (with or without dedicated effort, if this is not initially possible).
- The definition of basic activities (as seen below in point 3.1.1 – establishment requirements).
- Definition of the target stakeholders and the core business model for the node – how it will be funded, how it will work in case of not being funded.

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<sup>4</sup> A first version of the focal points was kindly provided by the German national node strategy. More information on the German node is available at: <https://operas-ger.hypotheses.org>.

<sup>5</sup> Basic information on the project available at: <https://operas-eu.org/projects/operas-plus/>.



### 3.1 Establishment requirements

Although the current 12 national nodes<sup>6</sup> have different levels of development, they need to be presented publicly. Since June 2023 (M10), there is a dedicated page for the nodes on the OPERAS website<sup>7</sup>. For the first moment (and first version) of this page, some basic information about the nodes is in place, namely:

- Name of the node
- Country
- Lead institution
- Contact
- Website/newsletter/social media
- Logo

The presentation of the nodes on the OPERAS website is a clear sign that they are not a short-term project. However, this basic information is just a first step on communicating the nodes to the public. In the following sections, we present a first proposal of requirements for the nodes functioning.

#### **A) Initial activities of the nodes**

The activities that sustain the nodes are gathered from the previous experience of the 12 building-up OPERAS national nodes. As of the first term of 2023, there are some activities which are common to most of the nodes and that can be established as a basis both for the creation of new nodes and for the definition of the so-called “minimum viable national node”<sup>8</sup>:

- Establishment of regular events (ideally bi-monthly for the funded nodes and quarterly for the non-funded ones), inside each node and its stakeholders. Each meeting could have a specific approach, which can be defined from the topics of this list (provision of training on OPERAS services, discussion groups, joint activities with other national infrastructures etc.);
- Support and dissemination of OPERAS events and activities of interest to the national communities (researchers, librarians, research performing institutions, civil society, etc.)
- Provision of training on Open Science matters connected to OPERAS services (benefiting from the translation of OPERAS materials, which are further mentioned in topic B - coordinated activities of the nodes);

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<sup>6</sup> As of June 2023.

<sup>7</sup> Available at: <https://operas-eu.org/operas-national-nodes/>.

<sup>8</sup> Metrics for the minimum viable national node are detailed in section 4.



## **B) Coordinated activities of the nodes**

As discussed in the “Strategy” (section 2), there are requirements for the good maintenance of the national nodes coordination, which are essential for the cohesion of the nodes as a group. One crucial requirement, for example, is the need for meetings between the national nodes representatives on a regular basis, helping to keep the nodes objectives in the foreground.

For the first version of this roadmap, a list of these requirements includes:

- A common definition of regular meetings between all nodes, among the different nodes representatives and the OPERAS Coordination Team (OCT). The goal is to keep objectives clear among the nodes and allow for mutual help.
- The use of OPERAS technical and communicational support tools (as described in the 3.1.2 section below) to help achieve the minimum viable nodes activities. So far, the list of these activities includes:
  - Offering workshops and training to OPERAS services of interest to the national communities;
  - Providing translations to materials and training already available in OPERAS, from English to the national languages – these joint initiatives are organised and coordinated between the nodes and the OCT.
  - Advocating the GoTriple platform<sup>9</sup> at the national level to the ministries, research funding agencies, etc.;

## **C) Additional activities**

Departing from the example of some existing nodes, we gathered a list of complementary activities – that means, activities that are not available for all the nodes in their initial establishment, but are relevant once the node is active and, hopefully, funded:

- Creation of national portals/websites to organise information in the national SSH landscape and serve as a hub for open scholarly communication nationally, identifying the initiative as an OPERAS national hub and helping to place OPERAS as the major actor in SSH open scholarly communication landscape. The alignment of information to be presented on each website must be agreed during the national nodes exchange (organised by OPERAS OCT).
- Development of collaboration between the different national nodes, for example, establishing trainings in joint initiatives whenever relevant.
- Development of collaboration with other national infrastructures within

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<sup>9</sup> Link to the platform: <https://www.gotriple.eu>.

the SSH landscape, and the SSH open science landscape in particular, with the aim of making OPERAS and its national nodes relevant actors in the field, both at the European and the national level;

- Suggesting or prototyping new service ideas, resulting from the nodes activities and the interaction with the national communities' needs. These inputs could then be integrated into the workflow of OPERAS to be further developed inside a project, for example.
- Advocacy for the activities of the OPERAS Special Interest Groups<sup>10</sup>, proposing discussion rounds and workshops focused on the SIGs themes inside the national communities;
- Provision of consultation spaces for gathering the needs of the national stakeholders in relation to the Open Science doubts, needs and challenges inside the research community in each country.
- Give the opportunity for national/regional stakeholders to present their services to other national nodes.

### 3.2 Communication requirements

With regards to OPERAS support to national nodes, there are tools and workflows available for the nodes and, in exchange, OPERAS requires the nodes to contribute to the infrastructure with information to be spread in the central hub.

On the requests from OPERAS for the national nodes, the following points can be listed:

- Representation of OPERAS on a national level, helping to raise awareness to the infrastructure;
- Provision of workshops and presentations to introduce OPERAS, OPERAS services and joint policies.
- Provision of users for services and potential members – what can be done via the previous point: by providing workshops, the node helps raising awareness of OPERAS and OPERAS services, and can attract potential new members.

Regarding press releases and the relationship with media outlets, these actions are directed to high-level topics and they will always be requested by the OPERAS communication team. However, if the national node members can share blog posts about OPERAS whenever possible, this would be pertinent. In these cases, the translation of the blog posts is always welcome and highly recommended.

Besides its brief requests, the infrastructure can provide support to the national nodes in a variety of ways:

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<sup>10</sup> More information on OPERAS Special Interest Groups are available here: <https://operas-eu.org/special-interest-groups/>.



- OPERAS will provide guest speakers for trainings and other dissemination events;
- OPERAS offers the possibility to use its channels to invite events and spread the news from the nodes;
- OPERAS offers the possibility of using a social media tool<sup>11</sup> to prepare and schedule communication about the nodes.
- OPERAS will provide nodes logos during the first half of the OPERAS-PLUS project.
- The same is valid for communication materials, which can also be provided by the infrastructure communication team working on WP8<sup>12</sup>.
- OPERAS Key Performance Indicators (KPIs): OPERAS is currently developing a framework to collect and control KPIs. A dashboard will soon be available also for checking IP numbers<sup>13</sup> and where visitors come from when accessing OPERAS services and pages.

It is important to note that, in order to enjoy this kind of support from OPERAS, the node needs to be active and running well in terms of funding. The support activities from OPERAS to the nodes are of course not mandatory requirements, but they can boost the nodes communication very effectively.

## 4. Metrics

### 4.1 How to determine the minimum viable product for the OPERAS national

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<sup>11</sup> Hootsuite, a tool that allows posting, scheduling and gathering metrics for many types of social media channels and accounts, in one place. OPERAS has a Hootsuite account that can be used to prepare posts and share news on services, projects and national communities. Available at: <https://www.hootsuite.com/>.

<sup>12</sup> Work Package 8 is dedicated to communication and impact assessment nodes, and it's naturally connected with all the other OPERAS-PLUS WPs.

<sup>13</sup> "An Internet Protocol (IP) is a unique numerical identifier for every device or network that connects to the internet. Typically assigned by an internet service provider (ISP), an IP address is an online device address used for communicating across the internet". Available at: [https://www.techtarget.com/whatis/definition/IP-address-Internet-Protocol-Address#:~:text=What%20is%20an%20IP%20address%20\(Internet%20Protocol%20address\)%3F,for%20communicating%20across%20the%20internet](https://www.techtarget.com/whatis/definition/IP-address-Internet-Protocol-Address#:~:text=What%20is%20an%20IP%20address%20(Internet%20Protocol%20address)%3F,for%20communicating%20across%20the%20internet). Accessed in August 21, 2023.

## nodes?

This point reveals the importance of establishing national priorities and how they can work, even if there is no specific funding for the node. In this first roadmap, we propose the following metrics to make a national node viable:

- Establish national regular meetings (each 3, 2 months or monthly, for example);
- Keep a consistent presence in the regular meetings between the nodes and the OPERAS coordination team;
- Provide information for the OCT on the current state of the node (every four months) to update the section on the OPERAS website. This can be done as a simple report on a meeting organised for all the nodes to report together and provide a brief presentation (with maximum 10 slides) of what has been done in the last four months).
- Provide training to the national communities using the material prepared by OPERAS. There is no obligation to provide training for all services, but a commitment to provide training at least for the services in the final release is a strong indicator.
- Provide information of OPERAS in the national representative channels. The way of tracking this type of activity can, at least during the OPERAS-PLUS project, be added to the [KPIs and tracker spreadsheet](#) created by WP8.

### 4.2 Metrics for funded nodes

- Permanent human resources for the nodes coordination in 1 or 2 FTEs.
- Presence of nodes representatives at external events inside the country to raise awareness for OPERAS and the national node itself, informing about its activities.
- Four trainings per year inside the national community – at least one per trimester.
- National node website and regular updates of coordinated activities.
- At least two of the complementary activities listed in section 3.1.1, c completed.

## 5. Conclusion

OPERAS national nodes are strongly strategic to achieve OPERAS objectives, especially in what regards Objective 1: establishing of OPERAS as a pan-European, efficient



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organisation and highly representative of the SSH Open ScholComm<sup>14</sup> communities. In this sense, this roadmap represents one more step forward in this process.

The purpose of this deliverable is to better define basic activities, strategy, requirements and a common vision for the nodes – the ones already existing and the ones to arrive in the coming years. The objective was achieved, although there is much work still to be done in the coming months of the project.

Between M12 and M33<sup>15</sup>, when the final version of the roadmap will be delivered, a series of tests and polishing will be put in place, together with the three tasks of WP7<sup>16</sup>, which will be continuously developed. Funding will most probably be an important topic to keep discussing, as well as how to proceed with a node when there is no specific funding dedicated to it.

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<sup>14</sup> SchoComm: Scholarly Communication.

<sup>15</sup> OPERAS-PLUS M12: August 2023. M33: May 2025.

<sup>16</sup> The three tasks of WP7 are the following: **Task 7.1** – Support in the building of OPERAS national nodes, running from M1–M36; **Task 7.2** – Aligning the governance between the national nodes and the central hub, running from M12–M18; and **Task 7.3** – Connecting OPERAS with other national and international Social Sciences and Humanities nodes, running from M18–M36. The OPERAS-PLUS project has a duration of 36 months so two of the tasks last until the end of the project.