publishOA.ie

Comparison of Open Access Publishing Platform Software

Publish OA Technical Working Group (WG 3)
Lucy Hogan, Niamh Brennan (WG lead),
Ruth Hegarty, David Kane,
Frances Madden and
Hardy Schwamm

Table of Contents

Acronyms and abbreviations

Altmetric	A company that tracks mentions of research online in the form of an attention score
Amazon Glacier	An online file storage service
APC	Article processing charge
API	Application programming interface
Atom	A pair of Web standards for Web feeds
Booksonix	Title management software
CAS	Central authentication service
CIC	Cast Iron Coding (developers of Meru and Manifold)
CLOCKSS	A sustainable long-term online archive for digital content
COUNTER	A not-for-profit group providing a code of practice on the use of electronic resources
Crossref	A not-for-profit organisation that enables research to be discovered and reused
CrossRef Funder ID	A persistent identifier for a grant-giving organisation
csv	Comma-separated values file, typically for tabulated data
DataCite	A not-for-profit organisation that provides DOIs for research outputs
DC	Digital Commons
DCPS	Digital Commons Publishing Services
DOAB	Directory of Open Access Books
DOAJ	Directory of Open Access Journals
DOCX	A document file that can be opened with Microsoft Word.
DOI	Digital object identifier
Dublin Core	Dublin Core Metadata Element Set (DCMES), is a set of 15 main metadata items for describing resources
EBSCO	A provider of research databases, ejournals, subscriptions and discovery services
EPUB	Electronic publication (an eBook file format)
ETD	Electronic thesis or dissertation
EU	European Union
Digital Commons	Proprietary publishing platform for journals from bepress (acquired by Elsevier)
Flax	A Web presence for content produced in Kotahi and Ketida from the Coko Foundation
GDPR	EU General Data Protection Regulation
Google Analytics	Web analytics software provided by Google
Google Docs	Online free word processor provided by Google
Google Scholar	A free search engine that indexes scholarly outputs provided by Google
Heap	A product analytics platform
Helsinki	Helsinki Initiative on Multilingualism in Scholarly Communication
HTML (5)	Hypertext markup language (fifth version)
I4OA	Initiative for Open Abstracts
I4OC	Initiative for Open Citations
IP	Internet Protocol
ISBN	International standard book number
ISSN	International standard serial number
iThenticate	Plagiarism detection software
Janeway	An open-source scholarly publishing platform developed by Birbeck University

JATS (XML)	Journal article tag suite; it is an XML vocabulary for journals
KBART	Knowledge bases and related tools
Ketida	An open-source publishing platform for books from the Coko Foundation
Kotahi	An open-source publishing platform for journals from the Coko Foundation
LDAP	Lightweight directory access protocol
LOCKSS	Open-source technologies for digital preservation
m/s	Manuscript
Manifold	An open-source software that can be used for monographs, journals, essays, a collection of resources, etc.
Markdown	A markup language for adding formatting elements to plain-text documents
Meru	Next Generation Library Publishing discovery and display platform
METS (XML)	Metadata Encoding & Transmission Standard expressed in XML
MS	Microsoft
NA	Not applicable
OA	Open access
OAI-PMH	Open Archives Initiative Protocol for Metadata Harvesting
OJS	Open Journal Systems – an open-source end-to-end scholarly publishing platform for journals
OMP	Open Monograph Press – an open-source end-to-end scholarly publishing platform for monographs
ONIX	Online information exchange (for books)
OpenAIRE Guidelines	The OpenAIRE Guidelines help repository managers expose publications, datasets and metadata via the OAI-PMH protocol in order to integrate with OpenAIRE infrastructure
Open Science Badges	Badges that signal to the reader that the content has been made accessible in a persistent location
ORCID	A persistent digital identifier for researchers
OS	Open source
PDF	Portable digital format
PKP	Public Knowledge Project
PMC	PubMed Central
Portico	A preservation archive for ejournals, eBooks and digital collections
PPT	PowerPoint presentation
PubMed	A free search engine primarily for life science and biomedical topics
PubPub	An open-source, community-led, end-to-end publishing platform for knowledge communities
Pure	Elsevier's Research Information Management System
RAID	Research activity identifier
RDF	Resource Description Framework
RePEc	Research Papers in Economics
Rightslink	Helps scholarly publishers of all sizes to manage open access institutional agreements and collect publication charges
ROR	Research Organization Registry
RSS	RDF Site Summary or Really Simple Syndication – a web feed in standard machine-readable format
RTF	Rich text format
Scalar	An open-source publishing platform
Scopus	Elsevier's abstract and citation database
Section 508	Section 508 (Federal Electronic and Information Technology)

SEO	Search engine optimisation
Shibboleth	Identity management software
TOP	Transparency and openness promotion
URL	Uniform resource locator
URN	Uniform resource name
VPAT	Voluntary product accessibility template
WCAG	Web Content Accessibility Guidelines
WCAG A	Web Content Accessibility Guidelines criteria level A
Web of Science	A paid platform by Clarivate that provides access to multiple databases that provide reference and citation data from academic journals, conference proceedings, and other documents in various academic disciplines
Wikipedia	Free online encyclopaedia
WIP	Work in progress
XML	Extensible markup language
Zenodo	An open repository developed under OpenAIRE
Zotero	Free and open-source reference management software

Acknowledgements

Summary

The Irish government's National Open Research Forum funds projects with the aim of improving Ireland's open access landscape by implementing priority actions. PublishOA.ie was one of the six projects awarded funding by NORF under the 2022 Open Research Fund. The project's overall aim is to evaluate the feasibility of establishing a diamond open access platform for journals and monographs in Ireland. As part of this evaluation, Publish OA's technical working group was tasked with proposing a technical specification and developing a pilot for such a platform. To accomplish this, the group engaged in evaluating publishing platforms for journals and/or books. Thirteen platforms were chosen for this comparison, eleven agreed to have the information on their systems shared publicly, one asked for its information to excluded and one proved difficult to evaluate within the timeframe and was excluded. The platforms were compared against a substantial list of parameters split into 14 thematic sections, from front-end design to preservation. The results of this comparison and the proposed next steps in establishing a pilot platform are outlined in this report. A feasibility report will be drafted once the publishing community has engaged in the pilot and its needs have been elucidated.

Introduction

The Irish government's [National Open Research Forum](#) (NORF) funds projects with the aim of improving Ireland's open access (OA) landscape by implementing priority actions. [Publish OA](#) was one of the six projects awarded funding by NORF under the 2022 Open Research Fund. The project was launched in November 2022 and is funded for two years. Its overall aim is to evaluate the feasibility of establishing a diamond OA[1] platform for journals and monographs in Ireland.

Publish OA is co-led by the [Royal Irish Academy](#) and [Trinity College Dublin](#) and includes partners from the higher-education institutes in Ireland who contribute [members](#) to the project's five working groups. The third of these working groups (WG 3, the technical working group) is responsible for evaluating the technical feasibility of the proposed platform and for the development of a pilot platform.

As part of this evaluation, WG 3 was tasked with proposing a technical specification and developing a pilot for such a platform. To accomplish this, from May to August 2023 the working group engaged in evaluating 13 publishing platforms for journals and/or books – 11 of which agreed to have the results shared publicly, 1 asked their information to be excluded, and 1 proved difficult to evaluate within the timeframe. These platforms were compared against a substantial list of parameters split into 14 thematic sections, from front-end design to preservation, and from publication tools to the ability of the platform to accommodate different funding models. Once evaluated, the technical teams of the platform providers were given the opportunity to review and comment. The [methodology](#) for this study and its [results](#) are given below.

It is important to note that the information contained in this report is not exhaustive, providing a snapshot of the compared parameters without in-depth evaluation of the relative importance of each parameter. The aim in sharing this report is that it can be used by those interested in procuring a platform as a starting off point in their evaluation. The [next steps](#) in Publish OA's pilot platform development are given below. Once the pilot has been completed and the community's needs have been incorporated, a feasibility report on establishing a diamond OA platform for journals and monographs in Ireland will be drafted.

---

[1] Diamond open access is defined by [Science Europe](#) as 'a scholarly publication model in which journals and platforms do not charge fees to either authors or readers'. The type of publishing platform in question is one that allows for end-to-end publishing of journals and/or monographs and that is flexible in terms of interoperability with other publishing tools/software, publishing workflows, ecommerce needs and discoverability, among others.

Methodology

1. Choosing the platforms to compare

Thirteen platforms were chosen for this comparison – 11 of which agreed to have the results shared publicly, 1 asked their information to be excluded, and 1 proved difficult to evaluate within the timeframe. The chosen platforms were drawn from those most commonly used by publishers in Ireland – as identified by desk research performed to create the *Directory of Irish Publishers* – and from additional platforms identified by Publish OA's technical working group. As the publishing platforms currently used in Ireland are a mix of open source and propriety software, both types were assessed as this will be useful when assessing the current landscape, and should the platform eventuate in enticing publishers to join by showing how the pilot platform compares with the one they may currently use.

Having chosen the platforms, they were split nominally into journal and book publishing platforms, though some may have the potential to be used for both types of publication.

Journal publishing platforms:

- OJS/PKP
- Janeway
- Kotahi
- Flax
- Digital Commons
- Meru
- two other platforms, one proprietary (requested not to be shared publicly) and one open source (not possible to evaluate properly within the timeframe

Book publishing platforms:

- OMP/PKP
- Ketida
- Scalar
- PubPub
- Manifold

2. Selecting the comparison parameters to include

To perform the comparison, the technical working group created an Excel spreadsheet based on the comparison of institutional repository software published by the United Nations Educational, Scientific and Cultural Organization (UNESCO) (Bankier and Gleason, 2014) and on additional parameters identified by the technical working group (such as the Plan S Principles). These parameters fall under the following 14 categories: 1) infrastructure, 2) front-end design, 3) content organisation and control, 4) content discovery, 5) publication tools, 6) reporting, 7) multimedia, 8) social features and notifications, 9) interoperability, 10) e-commerce | financial, 11) support and documentation, 12) authentication, 13) accessibility, and 14) preservation.

Content is split into these categories to facilitate comparison on typical front and back-office tasks for users of a publishing platform be they publishers, editors, authors or administrators, with the categories being defined as follows:

- **Infrastructure:** fundamental features related to running a publishing platform, including hosting and installation;
- **Front-end design:** the user experience on the platform, including the user interface, branding and mobile optimisation;
- **Content organisation and control:** what can be published, what file types are supported, etc.;
- **Content discovery:** features that enable visibility and discovery of platform content;
- **Publication tools:** tools involved in standard publishing tasks such as peer review and editorial workflows;
- **Reporting:** types of reports available for stakeholders (publishers, editors, authors, funders, etc.);
- **Multimedia:** support for multimedia streaming, podcasts, etc.;
- **Social features and notifications:** features to facilitate social media use and sharing;
- **Interoperability:** the platform's ability to work with harvesters, discovery platforms, and other publishing/editorial systems;
- **E-commerce | financial:** support for e-commerce and funding models;
- **Support and documentation:** customer support and documentation offered to accompany software;
- **Authentication:** facilitation of institutional login and other API authentication (e.g. ORCID);
- **Accessibility:** compliance with various best practice on accessibility of the platform;
- **Preservation:** how preservation and maintenance of items on the platform is facilitated.

The number of parameters contained in each section varies with all parameters listed in the tables provided under the relevant category in the Results section below. It is also important to note that the list of parameters used in this comparison although lengthy is not exhaustive.

3. Performing the comparison

Using the Excel spreadsheet, members of the technical working group evaluated the platforms using demos, and documentation or information available online. The demos (both public and private) were arranged with the most popular and/or innovative platform providers to further aid in the evaluation of the platforms and to allow for questions to be asked and answered. In addition, the public demos, in the form of webinars, were open to the public and allowed for engagement with the publishing community and for their concerns and needs to be raised.

Where the working group was unsure, the relevant technical teams at the platform providers were contacted to clarify the specifications of their platform offerings. And all platform providers were given the opportunity to provide final comments on the comparison before it was published.

Results

The results for each platform under each comparison section are provided below. Each category will list journal publishing platforms first, followed by book publishing platforms. As mentioned above, some of these platforms may be used for both publication types, but they have been split here for ease of comparison by the type of publication they have historically most been associated with. Where information was not available the cells remain blank.

1. Infrastructure

Journal platform solutions

Infrastructure parameter/Platform	OJS/PKP	Janeway	Kotahi	Flax	Digital Commons	Meru
Hosted solution	Yes	Yes	Yes, via multiple hosting providers	Yes	Yes	Potential for hosting with Cast Iron Coding (CIC)
Locally installed software solution	Yes, physical hosting is on a server in Canada but with 'local' standalone installs	Yes	Yes, can be installed easily and run locally with minimum resources	Yes	No	Yes, local installation possible
Customer support/Community support	Yes	Yes	Yes, via community and hosting providers	Yes	Yes, customer support includes unlimited trainings, best practices, examples, etc.	Possible through service level agreement with CIC. Community support not yet available as the software is very new
Flexible structure	Yes	Yes, Janeway's workflow is modular and elements can be added and	Yes, highly configurable, modular system	Yes	Somewhat	Yes

Infrastructure parameter/Platform	OJS/PKP	Janeway	Kotahi	Flax	Digital Commons	Meru
		removed. It has a suite of workflow plugins				
Supports simple & qualified Dublin Core metadata	Yes	Yes	Yes, via submission metadata controls	No	Yes	Yes, flexible metadata schema
Supports JATS	Yes	Yes	Yes. Inbuilt production system for push button production of valid JATS	Yes	Not currently, can be exported and transformed to JATS XML	No
Customisable metadata	Yes	Yes	Yes, highly customisable	Yes	Yes	Customisable metadata schema
OS/proprietary	OS	OS	OS	OS	Proprietary	OS
Automatic system upgrades	Yes, if you choose to use the PKP Hosting Service, otherwise it is self-maintained	Yes (for hosted)	Yes, if hosted	No	Yes	No
Regular software updates and security patches	As above	Yes (8-12 week release cycle)	Yes, see https://gitlab.co ko.foundation/k otahi/kotahi/- /releases	Yes	NA	Through service level agreement with CIC or other vendors
Current stable platform version	Yes	Yes (1.5)	Yes (2.0)	Yes	Yes	No, still in beta version
Administrator configurations	Yes	Yes	Yes. Ability also to save workflow configurations as templates	Yes	Yes	Yes, very configurable by administrator

Infrastructure parameter/Platform	OJS/PKP	Janeway	Kotahi	Flax	Digital Commons	Meru
Supports standard user roles & access	Yes	Yes	Yes, also extensible	Yes	Yes	Yes
Supports METS	Yes, export journal metadata in METS XML format	No	Yes, via submission data configuration and integration with production interfaces. Requires configuration	No	No	Not yet, but has possibility for flexible metadata schema
Machine-readable info on OA status & licence	Yes, Creative Commons licences are machine readable	Yes	Yes	No	Yes	Yes
Linking to diverse related outputs like code, data, … in other repositories	Yes	Yes	Yes, via URL submissions or customisable submission fields, and a host of other aspects of the system that support linking to data including the publishing endpoint (CMS)	No	Limited	Yes
Compliant with GDPR	Yes	Yes	Yes – as long as the org using the system have compliant policies	Yes	Yes	Not yet
Supports multiple languages (Helsinki compliant)	Yes	Partially	Yes, multiple language support merge in a few weeks	Yes	Partially, expanded support	Possibility to support multiple languages

Infrastructure parameter/Platform	OJS/PKP	Janeway	Kotahi	Flax	Digital Commons	Meru
					currently under investigation	
OA repository integration (e.g. PubMed, Zenodo, institutional repositories)	Yes	Partial	Yes, many options integrated via API transactions. Easy to add more	Yes	Yes	Not yet
Archiving and preservation services integration (LOCKSS, CLOCKSS, Portico)	Yes	Yes	Yes (internal archiving service, not yet integrated with external service but easy to do if required)	Yes	Yes (Amazon Glacier preservation, can be included in LOCKSS, and CLOCKSS)	Not yet, but possible to configure a connection
Crossref and DataCite compatibility	Yes	Yes	Yes, on multiple levels	No	Yes	Not yet
Functionality arising from equity, diversity and inclusion requirements	Yes	Dyslexia view, font increase/ decrease	Yes, on the level of interface elements WCAG compliant and following standard UX best practices.	No	Yes, see accessibility requests	Fully accessibility tested

Book platform solutions

Infrastructure parameter/Platform	OMP/PKP	Ketida	Scalar	PubPub	Manifold
Hosted solution	Yes	Yes, via hosting providers.	Yes (but uploads are limited to 2 MB)	Yes	Yes
Locally installed software solution	Yes, physical hosting is on a server in Canada but with 'local' standalone installs	Yes, easy to install locally with minimum resources	Yes	No	Yes

Infrastructure parameter/Platform	OMP/PKP	Ketida	Scalar	PubPub	Manifold
Customer support/Community support	Yes	Yes, via community and hosting partners	Through the Alliance for Networking Visual Culture at alliance4nvc@gmail.com	Yes - see support & documentation section	Yes
Flexible structure	Yes	Yes, for developers via feature flags. Deeper config and plugin structure forthcoming			Yes
Supports simple & qualified Dublin Core metadata	NA	No	Yes		Yes
Supports JATS	NA	NA		Yes	No
Customisable metadata	NA	Yes, requires developer	Yes	Scheduled - arbitrary metadata - Admins can add arbitrary metadata fields to Pubs (possibly at the Collection level) and choose how to display those fields. Members can search Pubs by those fields.	No
OS/proprietary	OS	OS	Open Source	OS	OS
Automatic system upgrades	Yes, if you choose to use the PKP Hosting Service, otherwise it is self-maintained	Yes, for hosted solutions		Yes (centrally hosted)	Yes, for hosted solution
Regular software updates and security patches	Yes, if you choose to use the PKP Hosting Service, otherwise it is self-maintained	Yes, very active development team.		Yes, all new features and bug fixes apply to all PubPub communities	Yes
Current stable platform version	Yes	Yes, 2.0.	2.5.2 (April 2019)	6	7.0.1
Administrator configurations	Yes	Yes, requires manual config. settings		Yes	Yes

Infrastructure parameter/Platform	OMP/PKP	Ketida	Scalar	PubPub	Manifold
Supports standard user roles & access	Yes	Yes, also supports 'Google doc-like' sharing of books		Yes, three tiers of access (community-level, collection-level, and pub-level) for detailed access controls	Yes
Supports METS	NA	No	Not mentioned	No	No
Machine-readable info on OA status & licence	Yes, Creative Commons licences are machine-readable	Yes, in EPUB		Yes - PubPub generates structured machine-readable information about the document (DocMaps)	Yes
Linking to diverse related outputs like code, data, … in other repositories	Yes	Yes, via links internal to content	Yes	Yes	Yes
Compliant with GDPR	Yes	Yes, as long as user policies are compliant	Not mentioned	Yes	Yes: with v8 (summer 2023)
Supports multiple languages (Helsinki compliant)	Yes	Yes, in content including RTL content. Interface translation currently being built	No	Yes - but unsure if H compliant	Yes, interface can be translated
OA repository integration (e.g. PubMed, Zenodo, institutional repositories)	No, but workaround could be customised	No, but has experience doing this for other software and can implement if required	No	Yes, by request	No
Archiving and preservation services integration (LOCKSS, CLOCKSS, Portico)	Yes	As above	No	Portico can scrape if publisher has a relationship. Is included in Internet Archive Scholar	Yes (Portico)
Crossref and DataCite compatibility	Yes	As above	No	Yes, users can assign up to 10 free DOIs (using PubPub's prefix) and then pay $1 per DOI. Can also email KF team to link own Crossref account for free.	Yes: Manifold can display but does not mint DOIs

Infrastructure parameter/Platform	OMP/PKP	Ketida	Scalar	PubPub	Manifold
				DataCite compatibility is a recent feature	
Functionality arising from equity, diversity and inclusion requirements	Yes	WCAG compliant interface elements	Not mentioned	Yes, text-to-audio (paid services feature in many languages); pro-bono partnership with C4DISC on Toolkits for Equity	Yes (monitored via tickets and a roadmap)

2. Front-end design

Journal platform solutions

Front-end design parameter/Platform	OJS/PKP	Janeway	Kotahi	Flax	Digital Commons	Meru
Integrated front end	Yes	Yes	Yes – fully integrated CMS	Yes	Yes	Yes
Full-service front end	Yes	Yes	Yes. Kotahi can integrate with multiple front ends and has its own internal CMS	Yes	Yes	Yes
Customisable platform design	Yes	Yes	Internal CMS is highly customisable	Yes, highly configurable	Yes	Next round of development: Customisable page templates and content blocks
Customisable publication design	Yes	Yes	Yes, internal CMS is highly configurable	Yes, highly configurable	Yes	Customisable landing pages for communities and collections
Mobile-optimised design	Yes	Yes	Yes	Yes, highly configurable	Yes	Yes

Front-end design parameter/Platform	OJS/PKP	Janeway	Kotahi	Flax	Digital Commons	Meru
HTML5 web pages	Yes	Yes	Yes, whatever version of HTML preferred	Yes	Yes	Possibility for full-text HTML display
Custom domain support	Yes	Yes	Yes!	Yes	Yes	Yes
Customisable journal templates and themes	Yes	Yes	Yes, highly configurable	Yes, highly configurable	Yes	Templates optimised for journal articles and ETDs
Branding and logo support	Yes	Yes	Yes, highly configurable	Yes, highly configurable	Yes	Yes
Customisable navigation menus and widgets	Yes	Yes	Yes, highly configurable	Yes, highly configurable	Partially – expanded customisation options are in development	Yes

Book platform solutions

Front-end design parameter/Platform	OMP/PKP	Ketida	Scalar	PubPub	Manifold
Integrated front end	Yes	Yes		Yes	Yes
Full-service front end	Yes	Yes		Yes	Yes
Customisable platform design	Yes	If integrated with FLAX then highly configurable		Yes, under Layouts, Iteration 1 (Allows users to select from a gallery of custom "chrome" layouts for header, footer, and potentially sidebars.)	Yes, there are options and limits
Customisable publication design	Yes	Yes, highly configurable	Yes	Yes	Yes
Mobile optimised design	Yes	Yes, highly configurable	Yes	Yes	Yes
HTML5 web pages	Yes	Yes, whatever type of HTML you prefer	Yes		Yes
Custom domain support	Yes	Yes, of course!	No		Yes
Customisable journal templates and themes	Yes, customisable press templates	Yes, highly configurable	No	Yes	No
Branding and logo support	Yes	Yes, highly configurable	Yes	Yes	Yes
Customisable navigation menus and widgets	Yes	Yes, highly configurable	Yes	Yes, menus - under Layouts, Iteration 1 (Allows users to select from a gallery of custom 'chrome' layouts for header, footer, and potentially sidebars.)	No

3. Content organisation and control

Journal platform solutions

Content organisation and control parameter/ Platform	OJS/PKP	Janeway	Kotahi	Flax	Digital Commons	Meru
Immediate open access publishing	Yes	Yes	Yes, push button publishing	Depends on what it is connected to.	Yes	Yes
Access controls	Yes	Yes	Yes, for editorial team	Depends on what it is connected to	Yes	Yes
Auto-lift embargo support	Yes	No, Janeway does not support embargos or paywalls of any type.	Yes, if added as an export plugin	Depends on what it is connected to	Yes	Yes
Community publication	Yes	Yes	Yes, Kotahi supports hierarchical or flat community-based workflows	Depends on what it is connected to	Yes	
Series/collection/curated collection publication	Yes	Yes	Yes, configured via customisation of the internal CMS or integration with external hosting platforms	Yes, highly configurable. Can support the hierarchies you choose	Yes	Ability to flexibly define collections share content between collections & customisable collection hierarchies and display
Journal publication	Yes	Yes	Yes	Can support any kind of publication	Yes	Yes
ETD (electronic thesis or dissertation) publication	Yes	Yes	Yes, can easily be used for this	Yes, can easily be used for this	Yes	Yes

Content organisation and control parameter/ Platform	OJS/PKP	Janeway	Kotahi	Flax	Digital Commons	Meru
Book publication	Yes, it can be done on OJS but is not recommended by PKP	Yes	Use Ketida instead, but can be used for managing the review of books	Yes, see Louvre publication example (https://livres.louvre.fr/vandyck/)	Yes	Not yet
Conference and event publication	Yes	Yes	Yes, easily	Yes, easily	Yes	Not yet
Image gallery	Yes	Yes	Yes, via the inbuilt scholarly word processor	Yes, if integrated with Kotahi	Yes	Yes
Supports standard file types (PDF, MS Word, RTF, epub, etc.)	Yes	Yes	Yes, supports an enormous variety of submission types and ingests docx for use in its word processor	Yes, as a hosting environment it supports anything	Yes	Yes
Flexible document organisation	Yes	Yes	Yes, very configurable	Yes, very configurable	Yes, can organise by different criteria, e.g. publication date, document type, etc.	Yes
Customisable metadata on article pages	Yes	Yes	Yes, very configurable	Yes, very configurable	Yes	Customisable metadata schema
PDF viewer on article/chapter page	Yes	Yes	Yes, but recommend supporting full text instead and linking to the PDF for download	Yes, but recommend supporting full text instead and linking to the PDF for download	Yes	Embedded PDF viewer

Content organisation and control parameter/ Platform	OJS/PKP	Janeway	Kotahi	Flax	Digital Commons	Meru
Submit & store supplemental/additional article/chapter files/datasets	Yes	Yes	Yes	Yes, for display	Yes	Yes
Custom cover page stamping	No	No	Yes, watermarking for PDF rendering if required	Yes, watermarking for PDF rendering if required	Yes	No
Supports Creative Commons licensing	Yes	Yes	Yes	Yes	Yes	Yes
OpenAIRE-compliant metadata	Yes	Unsure	Yes, can be configured via multiple avenues	Yes, requires configuration	Partial. v3 mandatory requests. V4 compliance in development	Can be configured to be compliant
User able to download full text in machine-readable format (JATS XML)	Yes, for texts prepared in JATS XML	Yes, if galley is generated	Yes, Kothai has an internal production system that can pass JATS to the CMS for display	Yes, you can link to anything	No	Not yet

Book platform solutions

Content organisation and control parameter/Platform	OMP/PKP	Ketida	Scalar	PubPub	Manifold
Immediate open access publishing	Yes	Yes		Yes	Yes
Access controls	Yes	Inbuilt 'Google sharing-like' controls		Pub managers can hide releases, e.g. if they just contain small fixes or typos.	Yes

Content organisation and control parameter/Platform	OMP/PKP	Ketida	Scalar	PubPub	Manifold
Auto-lift embargo support	Yes	No, unless via the chosen hosting environment	No	No	No
Community publication	Yes	Yes, book sprints		Yes	Yes
Series/collection/curated collection publication	Yes	Yes, on production side	No	Yes	Yes
Journal publication	NA	NA	No	Yes	Yes
ETD (electronic thesis or dissertation) publication	Yes	Yes, can be used for this	Yes	Yes	Yes
Book publication	Yes	Yes	Yes	Yes	Yes
Conference and event publication	Yes	Yes, this is possible		Yes	Yes
Image gallery	Yes	Yes	Yes	Yes, via interactive media embeds (slides and/or h5p)	Yes
Supports standard file types (PDF, MS Word, RTF, epub, etc.)	Yes	Supports MS Word on ingestion, creates PDF and EPUB		Yes - see Importing	Yes, the Manifold reader accepts EPUB, HTML, Markdown, Google Docs, and DOCX files for ingestion. PDFs can be added as resources but not ingested
Flexible document organisation	Yes	Yes, table of contents can be arranged via drag and drop		Yes	Yes
Customisable metadata on article pages	Yes (book level)	Yes, can customise at book level	Yes	Yes	No
PDF viewer on article/chapter page	Yes	Yes, as an export preview feature	Yes	No, can embed pdfs on pages and within pubs and can flip through a pdf via an interactive media embed	No
Submit & store supplemental/additional	Yes	Yes, it can store additional files	No	Yes	Yes

Content organisation and control parameter/Platform	OMP/PKP	Ketida	Scalar	PubPub	Manifold
article/chapter files/datasets					
Custom cover page stamping	No	Yes, watermarking is possible			No
Supports Creative Commons licensing	Yes	Yes	No	Yes	Yes
OpenAIRE-compliant metadata	Yes	Possible with development work	No		No
User able to download full text in machine-readable format (JATS XML)	Yes, for texts prepared in JATS XML	No, Ketida can export to BITS direct	No	Yes	Yes, if publisher loads a downloadable file for this purpose

4. Content discovery

Journal platform solutions

Content discovery parameter/Platform	OJS/PKP	Janeway	Kotahi	Flax	Digital Commons	Meru
Integrated search engine	Yes	Yes	Yes, with expression matching, etc	Yes, can also be customised	Yes	Yes
Advanced search with facets	Yes	No, coming in future release	Yes, as above	Yes, as above	Yes	Faceting by any metadata element
Full text search indexing	Yes	Yes	Yes, full text search	Yes, full text search	Yes	Full-text search
Browse options	Yes	Yes	Internal CMS content can be browsed	Presents content online	Yes	Landing pages that aggregate an author's content in an instance of Meru
Graphical navigation of content	Yes	Yes	Yes	Yes	No	Yes, browsing supported

Content discovery parameter/Platform	OJS/PKP	Janeway	Kotahi	Flax	Digital Commons	Meru
Geolocation tools	Yes, metrics store country and city info if available	Yes, currently at country level	Yes, can be integrated via submission forms and published via the CMS	Yes, can add this as a data type	Yes	No
Search engine optimisation (SEO)	Yes	Partially	Yes	Yes	Yes	Not yet
Indexed in Google Scholar	Yes	Yes	Yes, via CMS	Yes, easily done via configuration	Yes	Google Scholar metatags on item landing pages
DOI and persistent URLs	Yes	Yes	As far as anything can be persistent.	As far as anything can be persistent.	Yes	Possible to display DOIs, but not yet to mint them
URNs, handles	Yes	Yes	ISSN etc supported	ISSN etc supported	Yes	No
Thema classification	No, but Thema headings can be entered as categories	No	NA	Yes, if used to host books	Possible to capture in metadata	
BIC (Book Industry Communication subject code)	NA	No	NA	Yes, if used to host books	NA	No
Field for an ISBN	NA	Yes	NA	Yes, can be supported	Yes	Possible to configure
Allows upload of book cover	NA	Yes	NA	Yes	Yes	Yes
Keywords	Yes, manually entered	Yes	Multiple places this is supported	Add keywords in any way you like	Yes	Yes
Synopsis (book/issue) - short & long	NA	Yes	Can be added via Flax	Yes, can add if needed	Yes	Yes
Author biography	Yes	Yes	Yes	Yes, can add if needed	Yes - can be added as a field	Yes

Content discovery parameter/Platform	OJS/PKP	Janeway	Kotahi	Flax	Digital Commons	Meru
Book/journal/article review	No	Yes	Yes	Yes, can add if needed	Yes - as article type	No
Table of contents (hyperlinks for navigation)	Yes	Yes	Yes, with internal CMS	Yes, can add if needed	Yes	No
Citation export	Yes	Yes	Yes	Yes, can add if needed	Partial - only some formats. Expanded formats under investigation	Yes
Link resolver software integration	Yes	No	Yes	NA	Yes	No
Supports Crossref Funder ID integration	Yes, via plug in	Yes	Yes	Yes, can add if needed	No	Not yet
Supports ORCID authentication and integration for authors, reviewers, editors	Yes	Yes	Yes, out of the box ORCID login, etc.	Yes, can add if needed	Partial, just field	No
Doi generator & management (Crossref/DataCite)	Yes	Yes	Yes, managed in a variety of ways	Yes	Yes	No
Convenient formatting/licensing for online aggregators (e.g. EBSCO)	No	No	Yes, managed in a variety of ways	Yes	Yes	No
RSS and Atom feeds	Yes	Yes	Yes	Yes, requires config	Yes	No
Supports RePEc	No	Partial, can be configured to generate RDF for indexing but not automated	Yes	Yes, with internal CMS	No	No
Support for indexing in DOAJ, DOAB, Scopus, Web of Science	Yes	Yes (except DOAB)	Yes, some of this exists, some on the roadmap for delivery in 2023	Yes	Yes	No

Content discovery parameter/Platform	OJS/PKP	Janeway	Kotahi	Flax	Digital Commons	Meru
Discoverability layer 1: search & display across all publications on the platform	Yes, depends on how the installation is built by the client but it is possible	No, coming in a future release	Yes	Yes, needs config.	Yes	Yes
Discoverability layer 2: search & display across all affiliated / compliant publishers (including those publishing on a local platform)	As above	No	Yes	Yes. This can be achieved	No	No

Book platform solutions

Content discovery parameter/Platform	OMP/PKP	Ketida	Scalar	PubPub	Manifold
Integrated search engine	Yes	No, it is a book production platform and users manage content from their dashboard		Yes	Yes
Advanced search with facets	Yes	As above	No	No	Yes
Full text search indexing	Yes	As above	No	Yes	Yes
Browse options	Yes	As above	No	No	Yes
Graphical navigation of content	Yes	Yes, via dash	No	Yes	Yes
Geolocation tools	Yes, metrics store country and city info if available	Can be done via metadata tools with some development	Yes	Yes, can see geographic spread of readers/visitors	No
Search engine optimisation (SEO)	Yes	No, it is a book production platform	No	Yes	Yes
Indexed in Google Scholar	Yes	No, it is a book production platform	No	Yes	No

Content discovery parameter/Platform	OMP/PKP	Ketida	Scalar	PubPub	Manifold
DOI and persistent URLs	Yes	No, it is a book production platform	No	Yes	Yes
URNs, handles	Yes	Yes, ISBN	No	Yes - ISSNs, ISBNs, Links	No
Thema classification	Yes	Can be added	No	No	No
BIC (Book Industry Communication subject code)	Yes	Can be added		No	No
Field for an ISBN	Yes	Yes, in metadata	No	Yes	Yes
Allows upload of book cover	Yes	Yes, through dash and external service integrations in the case of print on demand, can also be added via template tools for EPUB generation	Yes	Yes	Yes
Keywords	Yes	Yes	No	Yes, in properly formatted abstract	Yes
Synopsis (book/issue) - short & long	Yes	Yes	Yes	Yes	Yes
Author biography	Yes	Yes		Yes	Yes
Book/journal/article review	No	Possible		Yes	Yes
Table of contents (hyperlinks for navigation)	Yes	Yes, it generates TOCs in multiple ways for different scenarios	Yes	Yes	Yes
Citation export	Yes	Yes, into final content formats	Yes	Yes	No: Citations cannot be exported, but Manifold does generate citations based on project metadata, which can be copied/pasted by the reader.
Link resolver software integration	Yes	No, can be added		Yes - Pub routes	No
Supports Crossref Funder ID integration	Yes	If added in content	No	No	No

Content discovery parameter/Platform	OMP/PKP	Ketida	Scalar	PubPub	Manifold
Supports ORCID authentication and integration for authors, reviewers, editors	Yes	No, but could be added via a Kotahi module	No	Scheduled for Q3 2023	No
DOI generator & management (Crossref/DataCite)	Yes	As above	No	Yes - mints dois by CrossRef & Integrate DataCite and improve DOI handling currently being worked on	No
Convenient formatting/licensing for online aggregators (e.g. EBSCO)	No	It's a book production system	No	No	No
RSS and Atom feeds	Yes	As above	No	Yes	No
Supports RePEc	No	As above	No	No	No
Support for indexing in DOAJ, DOAB, Scopus, Web of Science	Yes	As above	No	Yes	No
Discoverability layer 1: search & display across all publications on the platform	Yes, depends on how the installation is built by the client but it is possible	As above	Only selection	Yes	Yes
Discoverability layer 2: search & display across all affiliated / compliant publishers (including those publishing on a local platform)	Yes, depends on how the installation is built by the client but it is possible	As above	No	NA	No

5. Publication tools

Journal platform solutions

Publication tools parameter/Platform	OJS/PKP	Janeway	Kotahi	Flax	Digital Commons	Meru
Author registration and submission	Yes	Yes	Yes, default is ORCID reg, but this can be changed.	Can be added	Yes	No support for any submission and editorial functions. It needs to be integrated with an upstream submission system
Facility for authors to make test submissions	Yes	No	Yes, but currently need to be removed manually	NA	Yes	As above
Plagiarism detection	Yes	Yes, via iThenticate, a subscription is required	Yes, possible	NA	Yes, added service DCPS	As above
Role-based journal editor permissions	Yes	Yes	Yes	If integrated with a workflow system (e.g. Kotahi)	Yes	As above
Customisable submit forms	Yes	Yes	Yes	NA	Yes	As above
Manuscript tracking	Yes	Yes	Yes, reporting system internal	Via web analytics	Yes	As above
Article processing and production	Yes	Yes	Yes, an internal 'push button' production system included in the platform	NA	Yes	As above
Integrated peer review tools	Yes	Yes	Yes, with many reviewer configuration options	NA	Yes	As above

Publication tools parameter/Platform	OJS/PKP	Janeway	Kotahi	Flax	Digital Commons	Meru
Support single anonymous, double-anonymous and open peer review	Yes	Yes	Yes, and share/collaborative reviews, commenting via internal Scholarly word processor, etc.	NA	Partial, open peer review not currently available	As above
Reviewer invitation and management	Yes	Yes	Yes, automated with reminders, etc.	NA	Yes	As above
Ability to refer submissions to other publishers with the option for any peer review reports or initial assessments to follow	No, have participated in industry setting of standards for this but without an agreement reached to date	No	Currently working on this	NA	No	As above
Review forms and evaluation criteria	Yes	Partial, Janeway has customisable review forms, but doesn't store criteria against them, but could be developed though and is quite useful/interesting	Yes, also highly customisable via drag and drop interface	NA	Yes	As above
Communication tools for editors, authors, and reviewers	Yes	Janeway operates via email, it has a WIP for a context specific discussion system	Yes, many options, including email, task notifications, threaded discussion,	NA	Yes	As above

Publication tools parameter/Platform	OJS/PKP	Janeway	Kotahi	Flax	Digital Commons	Meru
			video chat, text chat, etc.			
Decision-making workflow (accept, revise, reject)	Yes	Yes	Yes, and highly configurable	NA	Yes	As above
Support pre-prints	Yes, through use of similarly structured Open Preprint Systems	Yes	Yes, through collaboration with eLife, NCRC, Colab Biophyscis and other preprint and PRC orgs. Can host reviews or act as a preprint server	Can acts as a preprint server or host published reviews	Yes, in conjunction with DC IR	As above
Version control and history tracking	Yes	Yes	Yes, versioning of all data (including manuscript, all metadata, comms, etc)	NA	Yes	As above
Editorial and production workflow	Yes	Yes	Yes, and highly configurable	NA	Yes	As above
Flexible publishing workflows	Yes	Yes, our workflow blocks are quite flexible	Yes, highly configurable	Yes, highly configurable	Yes	As above
Auto-conversion of full text files to PDF	No	No, but does support HTML	Yes, through an internal production system converting to PDF managed by Pagedjs	Yes, managed by Pagedjs	Yes	As above
Retain metadata and full text revisions	Yes	Yes	Yes, via versioning systems	Can be configured to support this.	Yes	As above

Publication tools parameter/Platform	OJS/PKP	Janeway	Kotahi	Flax	Digital Commons	Meru
Batch import	Yes, with PKP PS Migration Service support	Yes	Yes, but requires some small changes to existing ingestion pipeline	Yes, can migrate from a CMS using our batching tools (1-minute migrations) or can batch publish from an integrated workflow (e.g. Kotahi)	Yes	As above
Batch revision	No	Yes	May be possible	Yes, as above	Yes	As above
Auto-collection tools	No	Partially	Yes, using AI and other integrations	NA	Partial, within all of Digital Commons	As above
Ability to publish editorial statistics	Yes	Can be exported and published	Yes	Yes	No	As above
XML-based typesetting and formatting	Yes	Janeway supports JATS 1.2	Yes, internal production system allows for automated creation of JATS	Can build or import XML	Yes in DCPS tier	As above
Proofreading and copyediting tools	Yes	Has a workflow for proofreading and copyediting but wouldn't describe them as tools for doing the actual work	Yes, via an internal scholarly word processor	Yes, via CMS tooling	Yes, in DCPS	As above
Link to external service providers (e.g. copyright experts, copy editors, typesetters, etc.)	Yes	Works closely with a copyediting and typesetting service provider that it uses for its journals @	Yes, some of these services also offer Kotahi as part of their technical offering	Yes, possible	Yes, in DCPS	As above

Publication tools parameter/Platform	OJS/PKP	Janeway	Kotahi	Flax	Digital Commons	Meru
		the Open Library of Humanities				
Support open citations (I4OC)	Yes	Yes, via Crossref	Yes, deposits possible currently	NA	No	As above
Support open abstracts (I4OA)	Yes	Yes, via Crossref	Yes	NA	No	As above
Support publication metrics integration (usage, Altmetric, Open Science Badges, Transparency and Openness Promotion (TOP)) & links to ImpactStory profiles	Yes	Some, can be customised as required	Yes	NA	Yes	As above
Support metrics to illustrate impact nationally and internationally (benchmarking comparisons with Ireland, EU, etc.)	Yes	All of our collected metrics hold country level data that could be used to provide this	Can be done provided data collection is GDPR complaint	NA	Yes	As above
Support metadata export (csv, ONIX XML, Dublin Core, etc.)	Yes	CSV, DC, JATS via our OAI-PMH feed	Yes, in many ways	A CMS, can be configured to export	Yes	As above
Support export formats (PDF, HTML, ePub, etc.)	Yes	Yes	Yes, via the production interface	Yes, can be configured to do this	Yes	As above
Support print on demand	Yes	No	Yes, Ketida could be brought into Kotahi if required	Yes	Partial, can link to third party	As above
Export to PubMed, Crossref, DataCite, Aggregators (EBSCO, etc)	Yes	Yes	Yes, some in place some on 2023 road map	Could be done but normally not done via the CMS	Yes	As above

Book platform solutions

Publication tools parameter/Platform	OMP/PKP	Ketida	Scalar	PubPub	Manifold
Author registration and submission	Yes	Yes, can also be integrated with a variety of author protocols	Yes	Yes	No
Facility for authors to make test submissions	Yes	Yes, have to be removed annually	No	Yes, if set up by the community	No
Plagiarism detection	Yes	Yes, can be integrated	No	No	No
Role-based journal editor permissions	Yes	NA	Yes	Yes (e.g. Community Admins can delete Pubs, Collections and pages without the action being permanent)	No, Manifold includes multiple user roles with varying permissions per role, but these are not specifically related to journal publishing
Customisable submit forms	Yes	Yes		Yes, but limited	No
Manuscript tracking	Yes	Yes, on a very granular level	No	Yes, but limited	No
Article processing and production	Yes	Yes, automated output of beautiful PDF, EPUB, ICML and other formats	No	Yes	No
Integrated peer review tools	Yes	Currently building in to Ketida (can also be used with Kotahi for review)	No	Yes	No, Manifold does not have peer review features integrated into the interface. However, several publishers have used Manifold's annotation system for public and private peer review
Support single anonymous, double-anonymous and open peer review	Yes	As above	No	Yes, single-anonymous and open; No, double blind (technically can be set up by individual community but it's not	No, see above. Manifold can and has been used for peer review, but it does not have features such as

Publication tools parameter/Platform	OMP/PKP	Ketida	Scalar	PubPub	Manifold
				designed to be used this way at the moment. Will be possible in V7)	the ability to assign a peer review to a reader like some journal publishing systems
Reviewer invitation and management	Yes	As above	No	Yes	No
Ability to refer submissions to other publishers with the option for any peer review reports or initial assessments to follow	No, have participated in industry setting of standards for this but without an agreement reached to date	As above	No	No	No
Review forms and evaluation criteria	Yes	As above	No		No
Communication tools for editors, authors, and reviewers	Yes	On 2023 road map	No	Yes - Suggestion Mode: Pub Editors can propose changes that Pub Admins can comment on, accept or reject.	No
Decision-making workflow (accept, revise, reject)	Yes	As above	Yes	Yes	No
Support pre-prints	Yes, through use of similarly structured Open Preprint Systems	NA	No	Yes	Yes
Version control and history tracking	Yes	On 2023 roadmap		Yes	No
Editorial and production workflow	Yes	On 2023 roadmap	Yes	Yes, with limitations	No
Flexible publishing workflows	Yes	Yes		Yes	Yes
Auto-conversion of full text files to PDF	No	Yes, highly customisable push button export to PDF	No	Yes	No
Retain metadata and full text revisions	Yes			Yes	Yes

Publication tools parameter/Platform	OMP/PKP	Ketida	Scalar	PubPub	Manifold
Batch import	No	Yes, batch import of docx and converted into internal file format for the internal word processor	Yes	Yes, paid service option	No
Batch revision	No			No	No
Auto-collection tools	Yes			No	?
Ability to publish editorial statistics	Yes	Yes		No, not automated	No
XML-based typesetting and formatting	Yes	Possible depending upon the version of XML		Yes	No
Proofreading and copyediting tools	Yes	Yes, via internal word processor		Yes, version history, annotations, track changes	No
Link to external service providers (e.g. copyright experts, copy editors, typesetters, etc.)	Yes	Yes, links can be added		Yes, part of paid service offerings	No
Support open citations (I4OC)	Yes	Yes		Yes	No
Support open abstracts (I4OA)	Yes	Yes		Yes	No
Support publication metrics integration (usage, Altmetric, Open Science Badges, Transparency and Openness Promotion (TOP)) & links to ImpactStory profiles	Yes	Yes		No	No
Support metrics to illustrate impact nationally and internationally (benchmarking	Yes	Yes		No; these are offered to admins but there's no automated way to make these public. Community admins can	No

Publication tools parameter/Platform	OMP/PKP	Ketida	Scalar	PubPub	Manifold
comparisons with Ireland, EU, etc.)				always choose to publish/share them	
Support metadata export (csv, ONIX XML, Dublin Core, etc.)	Yes	Can be configured for this		No	Yes, Dublin Core
Support export formats (PDF, HTML, ePub, etc.)	Yes	Yes, validated epub 3, html, PDF, ICML and more		Yes	Yes, epub
Support print on demand	Yes	Yes, have targeted POD trim sizes, etc., and also integrated directly with POD services		No; can set this up with an external provider	No
Export to PubMed, Crossref, DataCite, Aggregators (EBSCO, etc.)	Yes	Can be done if bring across the requisite Kotahi modules		Yes	No

6. Reporting

Journal platform solutions

Reporting parameter/Platform	OJS/PKP	Janeway	Kotahi	Flax	Digital Commons	Meru
Editor reports	Yes	Yes	Yes	No	Yes	No, but these would be available in upstream submission system connected to Meru
Usage/download reports	Yes	Yes	As above	Yes	Yes	Customisable reports & collection level metrics in the next round of development
Stakeholder reports	Yes	Yes	As above	No	Yes	Not yet

Reporting parameter/Platform	OJS/PKP	Janeway	Kotahi	Flax	Digital Commons	Meru
Author reports	Yes	No	As above	No	Yes	Not yet
Google Analytics integration	Yes	Yes	Easily done via internal CMS	Yes	Yes	Possible
Ability to report and visualise research linkages (institutionally and geographically)	No	No	As above	Yes	Yes	Usage map
Report stats for publishers (m/s flow, acceptance rate, production time, diversity, views, downloads, etc.)	Yes	Yes	Yes, via internal reporting module	No	Yes in DCPS tier	Article-level views and downloads
Report stats for funders (grant numbers, programme nos, dois, ISBN, ORCIDs, RAIDs, RORs, OpenAIRE compliance)	Yes	Can be created	Some of this	No	Partial, can create	No
Report stats for institutions	No	No	As above	No	Partial, can create	No
COUNTER-compliant reports	Yes	No, follows COUNTER methodology but is not compliant	As above	No	Yes	No

Book platform solutions

Reporting parameter/Platform	OMP/PKP	Ketida	Scalar	PubPub	Manifold
Editor reports	Yes	Sort of		No	No
Usage/download reports	Yes	Not directly, yes if integrated with a CMS		No	Yes
Stakeholder reports	Yes	Need more context		No	No
Author reports	Yes	Need more context		No	No
Google Analytics integration	Yes	Not directly, yes if integrated with a CMS	Yes	No	Yes

Reporting parameter/Platform	OMP/PKP	Ketida	Scalar	PubPub	Manifold
Ability to report and visualise research linkages (institutionally and geographically)	No	Need more context		No	No
Report stats for publishers (m/s flow, acceptance rate, production time, diversity, views, downloads, etc.)	Yes	Not currently		No	No
Report stats for funders (grant numbers, programme nos, dois, ISBN, ORCIDs, RAIDs, RORs, OpenAIRE compliance)	Yes	As above		No	No
Report stats for institutions	No	As above		No	No
COUNTER-compliant reports	Yes	As above		No	No

7. Multimedia

Journal platform solutions

Multimedia parameter/Platform	OJS/PKP [a]	Janeway	Kotahi	Flax	Digital Commons	Meru
Supports streaming of multimedia	Yes	No	Yes, in both video calls and content via internal CMS	Yes	Yes	Yes
Supports submission & hosting of images (incl. author profile pics & graphical abstracts)	Yes	Partially	Yes, many options	Yes	Yes - not a feature but can be done	Yes

Multimedia parameter/Platform	OJS/PKP [a]	Janeway	Kotahi	Flax	Digital Commons	Meru
Supports submission & hosting of slideshows (incl. voiced over)	Yes	Yes	Yes, via attachments and also internal CMS	Yes	Yes	No
Supports submission & hosting of audio (Podcasts, 3-min summaries)	Yes	Yes	Yes, via internal CMS	Yes	Yes	Yes
Supports submission & hosting of video	Yes	Partially	Yes, via internal CMS	Yes	Yes	No
Support linked advertising (graphical abstract, podcast, voiced over PPT, 3-min summary, reviews, author profile pics)	Yes	Yes	Yes, via internal CMS	Yes	Partial - can support links	Yes

[a] Some flexibility in allowing multimedia support is required. It is not played from within the PKP software but link-enabled to play from the platform.

Book platform solutions

Multimedia parameter/Platform	OMP/PKP [a]	Ketida	Scalar	PubPub	Manifold
Supports streaming of multimedia	Yes	In some outputs	Yes	Yes	Yes
Supports submission & hosting of images (incl. author profile pics & graphical abstracts)	Yes	Yes, sophisticated asset manager	Yes	Yes	Yes
Supports submission & hosting of slideshows (incl. voiced over)	Yes	Need more context		Yes	Yes: Manifold can display images as slideshow but there is no voiceover capability
Supports submission & hosting of audio (Podcasts, 3-min summaries)	Yes	Need more context	Yes	Yes	Yes

Multimedia parameter/Platform	OMP/PKP [a]	Ketida	Scalar	PubPub	Manifold
Supports submission & hosting of video	Yes	Need more context	Yes	Yes	Yes
Support linked advertising (graphical abstract, podcast, voiced over PPT, 3-min summary, reviews, author profile pics)	Yes	Need more context		Yes	No

[a] Some flexibility in allowing multimedia support is required. It is not played from within the PKP software but link-enabled to play from the platform.

8. Social features and notifications

Journal platform solutions

Social features and notifications parameter/Platform	OJS/PKP	Janeway	Kotahi	Flax	Digital Commons	Meru
Follow	Yes with plug in	Yes	Yes, via internal CMS	No	Yes	No
Share	Yes	Yes, Facebook, Twitter, LinkedIn	Yes, via internal CMS	No	No	Yes
RSS	Yes	Yes	Yes, via internal CMS	Yes	Yes	Not yet
Bookmark	No	No	Yes, via internal CMS	Yes	Yes	No
Publication and author mailing lists	Yes	Partially, publication but not author	Yes, via internal CMS	No	Yes	No
Reader comments	Yes	Yes, via plugin	Yes, via internal CMS	Yes	Partial, third-party integration	No
Saved searches	No	No	Yes, via internal CMS	No	Yes	No
Social media marketing	Yes	Partially	Yes, via internal CMS	Yes	No	No

Book platform solutions

Social features & notifications parameter/Platform	OMP/PKP	Ketida	Scalar	PubPub	Manifold
Follow	Yes with plug in	It's a book production system		Yes	Yes
Share	Yes	As above		Yes - Twitter, Reddit, Facebook, LinkedIn, Email	Yes
RSS	Yes	As above		Yes - in Sonic Scope run on pubpub	No
Bookmark	No	As above		No	No
Publication and author mailing lists	Yes	As above		No; no native newsletter mgmt but can integrate sign up forms for newsletter providers such as Mailchimp	No
Reader comments	Yes	Yes, via internal word processor		Yes - see Data Feminism	Yes
Saved searches	No	It's a book production system		No	No
Social media marketing	Yes	As above		Yes - uses Heap for Web and product analytics	No

9. Interoperability

Journal platform solutions

Interoperability parameter/Platform	OJS/PKP	Janeway	Kotahi	Flax	Digital Commons	Meru
Harvesting (OAI-PMH)	Yes	Yes	Yes	It's a CMS	Yes	Next round of development
Network or platform repositories	Yes	Yes	As above	As above	Yes	No

Interoperability parameter/Platform	OJS/PKP	Janeway	Kotahi	Flax	Digital Commons	Meru
Integration with discovery platforms	Yes	Yes	As above	As above	Yes	No
Integration with research profile pages	Yes	In future release	As above	As above	Partial, Pure only	No
Support metadata exchange APIs	Yes	Yes	Yes, completely configurable	Yes	Yes	Yes
Comply with OpenAIRE **Guidelines, KBART, COUNTER**	Yes	Partial	Not yet, would need to review	Not yet, would need to review	V3 mandatory requests. V4 in development	No
Support feeds to/from BooksonIx	NA	NA	NA	Possible	Unsure/No	No
Facility to use the platform for editorial work but not for publishing (export to other system/service)	Yes	Yes, has tools specifically for this	Yes, the use cases are very broad	It's a CMS	Possible but no specific tools	No

Book platform solutions

Interoperability parameter/Platform	OMP/PKP	Ketida	Scalar	PubPub	Manifold
Harvesting (OAI-PMH)	Yes	NA, it's a book production system	No		No
Network or platform repositories	Yes	As above	No		No
Integration with discovery platforms	Yes	As above	No		No
Integration with research profile pages	Yes	As above	No		No
Support metadata exchange APIs	Yes	As above	Yes		No
Comply with OpenAIRE **Guidelines, KBART, COUNTER**	Yes	Not yet, would need to review	No	No	No
Support feeds to/from BooksonIx	Yes	Currently no	No	No	No

Interoperability parameter/Platform	OMP/PKP	Ketida	Scalar	PubPub	Manifold
Facility to use the platform for editorial work but not for publishing (export to other system/service)	Yes	Yes		Yes	No

10. E-commerce | financial

Journal platform solutions

E-commerce	financial parameter/Platform	OJS/PKP	Janeway	Kotahi	Flax	Digital Commons	Meru
Publication supporters' fee/contribution management	Yes	Yes	2023 road map	No	No	No
Ability to process APCs and waivers/discounts	Yes	Partial	2023 road map	No	No	No
Manage the list of supporting institutions/billing, etc.	Yes	Yes	2023 road map	No	No	No
Allow individual payments as well as institutional	Yes	No	2023 road map	No	No	No
Accept online, bank transfers & manual payments for charges/fees/contributions	Yes	No	2023 road map	No	No	No
Support for advertising	Yes	Yes	Yes, via CMS	Yes	No	No
Support for memberships	Yes	No	Yes, via CMS	No	No	No
Email opt-in	Yes	No	Yes, internal tools to do so	No	Yes	No
Push notification	Yes	No	Yes, many options	Yes	Yes	No
User triggered actions/notifications	Yes	Yes	Yes, many options and highly configurable	No	Yes, not monetised	No

E-commerce | financial parameter/Platform	OJS/PKP	Janeway	Kotahi	Flax	Digital Commons	Meru
Enable payments from users/others	Yes	No	2023 road map	No	No	No
Donations	No	No	Yes, via CMS integrations	No	No	No
Sponsorship and associated advertising	Yes	No	Yes, via CMS integrations	No	Yes, can list but not manage	No
Micropayments (like Wikipedia)	No	No	Not under consideration currently	Yes	No	No
Supports transparent & standardised pricing policies	Yes	Yes	Yes, many options	Yes	Yes, editor's discretion	No

Book platform solutions

E-commerce | financial parameter/Platform	OMP/PKP	Ketida	Scalar	PubPub	Manifold
Publication supporters' fee/contribution management	Yes	NA, it's a book production system	No	No	No
Ability to process APCs and waivers/discounts	Yes	As above	No	No	No
Manage the list of supporting institutions/billing, etc.	Yes	As above	No	No	No
Allow individual payments as well as institutional	Yes	As above	No	No	No
Accept online, bank transfers & manual payments for charges/fees/contributions	Yes	As above	No	No	No, though following payment on a separate system, payees can be granted access manually to projects
Support for advertising	Yes	As above	No	No	No
Support for memberships	Yes	As above		No	No, though members can be granted access to projects via

E-commerce | financial parameter/Platform	OMP/PKP	Ketida	Scalar	PubPub	Manifold
					restricted reading groups
Email opt-in	Yes	As above		Yes	No
Push notification	Yes	As above		Yes	No
User triggered actions/notifications	Yes	Currently scoping		Yes	No
Enable payments from users/others	Yes	NA, it's a book production system		No	No
Donations	No	Can be done via CMS if integrated		No	No
Sponsorship and associated advertising	Yes	In content		No	No
Micropayments (like Wikipedia)	No	Not currently being considered		No	No
Supports transparent & standardised pricing policies	Yes	In content		No	No
Publication supporters' fee/contribution management	Yes	NA, it's a book production system	No	No	No

11. Support and documentation

Journal platform solutions

Support and documentation parameter/Platform	OJS/PKP	Janeway	Kotahi	Flax	Digital Commons	Meru
Comprehensive user guides and documentation	Yes	Yes	Partial, in development	Yes	Yes	Not yet
Community forums and support channels	Yes	Yes	Yes, via www.mattermost.coko.foundation	Yes	Yes	Not yet

Support and documentation parameter/Platform	OJS/PKP	Janeway	Kotahi	Flax	Digital Commons	Meru
Training resources (webinars, tutorials, etc.)	Yes	Yes	Yes	Yes	Yes	Not yet
Technical and customer support services	Yes	Yes	Yes, many options for this	Yes	Yes	Not yet
Forum for editors to share info and ask questions of one another	Yes	Yes	Yes, via mail list	Yes	Not yet	Not yet

Book platform solutions

Support & documentation parameter/Platform	OMP/PKP	Ketida	Scalar	PubPub	Manifold
Comprehensive user guides and documentation	Yes	Yes, docs for Ketida 2 release currently being updated	Yes	Yes	Yes
Community forums and support channels	Yes	Yes, via www.mattermost.coko.foundation	No	Yes	Yes
Training resources (webinars, tutorials, etc.)	Yes	Yes, evolving	Limited	Yes	Yes
Technical and customer support services	Yes	Yes, many options for this	Yes	Yes - but at a cost	Yes
Forum for editors to share info and ask questions of one another	Yes	Yes, via mail list	No	Yes, on Github (not limited to editors); Discussion Moderation Tools scheduled for Q3	Yes

12. Authentication

Journal platform solutions

Authentication parameter/Platform	OJS/PKP	Janeway	Kotahi	Flax	Digital Commons	Meru
Secure user authentication	Yes	**Yes**	Yes, ORCID out of the box, modules for other types can be swapped in	**No**	**Yes**	Yes
Supports LDAP (Lightweight Directory Access Protocol)	No	No	Not currently	No	Yes, only for single institution	Possible
Supports CAS (Central Authentication Service)	No	No	Yes, but requires config.	No	Yes, only for single institution	Possible
Supports system account authentication	Yes	Yes	As above	No	No	Possible
Supports Shibboleth authentication (Edugate)	Yes	Yes, via Django Shibb plugin	Not currently	No	Not yet	Possible
Supports ORCID authentication of users	Yes	Yes	Yes, out of the box	No	Yes in DCPS tier	Not yet, but possible

Book platform solutions

Authentication parameter/Platform	OMP/PKP	Ketida	Scalar	PubPub	Manifold
Secure user authentication	Yes	Yes, user registration and sign in	No	Yes	Yes
Supports LDAP (Lightweight Directory Access Protocol)	No	Not currently	No	No	No
Supports CAS (Central Authentication Service)	No	As above	No	No	No
Supports system account authentication	Yes	As above	No	No	Yes

Authentication parameter/Platform	OMP/PKP	Ketida	Scalar	PubPub	Manifold
Supports Shibboleth authentication (Edugate)	Yes	As above	No	No	No
Supports ORCID authentication of users	Yes	As above but can be brought over from Kotahi modules	No	Scheduled for Q3	No

13. Accessibility

Journal platform solutions

Accessibility parameter/Platform	OJS/PKP	Janeway	Kotahi	Flax	Digital Commons	Meru
VPAT statement	Yes	No	Not currently, need to review	No	Yes	No
Section 508 compliant	Yes	No	Not currently, need to review	No	Yes, some optional features may not comply	Not formally, but accessibility tested
WCAG (Web Content Accessibility Guidelines)	Yes	No, currently have an accessibility roadmap that is working to bring Janeway up to WCAG 2.1 AA)	Yes, on components	No	Yes, some optional features may not comply	Yes

Book platform solutions

Accessibility parameter/Platform	OMP/PKP	Ketida	Scalar	PubPub	Manifold
VPAT statement	No	Not currently, need to review	No	N, but HECVAT available	Coming August 2023
Section 508 compliant	Yes	Not currently, need to review	No		Yes
WCAG (Web Content Accessibility Guidelines)	Yes	Yes, on components	No		Yes

14. Preservation

Journal platform solutions

Preservation parameter/Platform	OJS/PKP	Janeway	Kotahi	Flax	Digital Commons	Meru
Content back up & recovery	Yes	Yes	Yes, via system	No	Yes	Not yet
LOCKSS-compliant	No	Yes	Yes, but integration hasn't been done	No	Yes	Not yet
Portico-compliant	Yes	Yes	As above	No	Yes	Not yet
CLOCKSS-compliant	Yes	Yes	Yes, but integration hasn't been done	Yes	Yes	Not yet
Format migration tools and services	Yes	Yes	Multiple options via internal production system	No	Can be	Not yet

Book platform solutions

Preservation parameter/Platform	OMP/PKP	Ketida	Scalar	PubPub	Manifold
Content back up & recovery	Yes	Yes, via system	No	Yes - see archiving	No
LOCKSS-compliant	No	Yes, but integration hasn't been done	No		Yes
Portico-compliant	Yes	As above	No		No
CLOCKSS-compliant	Yes	As above	No		No
Format migration tools and services	Yes	Multiple options via internal production system	No	Yes - see archiving	No

Remarks

It is important to note that as previously mentioned this comparison provides a snapshot of the platforms included in this study during May–August 2023. The relative importance of each parameter is not stated but will be further investigated following community input. The aim of this report is merely to allow the project team to begin assessing these platforms along existing criteria. This was combined with demos, and will be followed up with trialling of platforms and community engagement. The project aims to facilitate stakeholder assessment of their needs by providing an overview of what is available.

As such it is important to note that the answers provided in this spreadsheet will not always provide a lot of context, and may simply indicate a binary 'Yes' or 'No' response to a parameter's presence. The questions have been answered subjectively and while some providers have added extra comments to provide nuance, while some have not.

This comparison should be viewed as the beginning. The intuitive or innovative nature of these platforms will only be evident from using them. As previously stated, demos of some of these platforms are available via Publish OA. But those interested in a publishing platform should feel free to contact the platform providers directly to request demos or have their individual questions responded to.

Next steps: pilot trial of platforms

1. **Timeline**
   September 2023 to February 2024

2. **Platforms chosen**

   The platforms were chosen based on many factors, including which platforms were most commonly used, their user-friendliness, the support provided and the innovative nature and flexibility of the platform. Three journal platforms (OJS, Janeway, Kotahi) and three book platforms (OMP, Ketida, Manifold) were chosen. Trial instances of these platforms are being established for the project. Negotiations are also ongoing with the team behind Meru, a display platform, to see if the six platforms can be trialled within it. If not, instances will be trialled separately.

3. **User types to engage in the trial**
   The project envisages engagement with four user types:
   - established OA publishers (journals);
   - early-stage OA publishers (books (possibly) and journals);
   - absolute beginner (books and journals);
   - hybrid (partly commercial/partly OA) (books and journals).

   Engaging with these user types is attempted through:
   - an open call to interested parties via the Irish Open Access Publishers and Publishing Ireland;
   - requests for volunteers from project co-lead institutions (Royal Irish Academy and Trinity College Dublin);
   - invitations to academic publishers from the *Directory of Irish publishers*;
   - requests to postgraduate students.

Additional reading

General

Bankier J.G. & Gleason K. (2014) Institutional repository software comparison. UNESCO, Paris, 17 pp. [Institutional repository software comparison - UNESCO Digital Library](#)

Guimont C., Ball C.E. & Vaughn M. (2023) Finding the right platform. A crosswalk of Academy-owned and open-source digital publishing platforms (unpublished document).

Lippincott S. (2023) Meru Spec sheet (unpublished document).

Maxwell J.W. *et al.* (2019). Mind the gap. A landscape analysis of open source publishing tools and platforms. MIT Press. https://doi.org/10.21428/6bc8b38c.2e2f6c3f

User guides/support documentation

OJS/PKP: https://pkp.sfu.ca/support/
Janeway: https://janeway.systems/support_and_docs
Kotahi: https://kotahi.community/content/support/
Flax: https://gitlab.coko.foundation/flax/flax
Digital Commons: https://bepress.com/products/digital-commons/resources/
Meru: https://drive.google.com/drive/folders/1q8iDP76bkTGL6VVfQmfdQpoG26RDlV_b
Libero Reviewer: https://gitlab.coko.foundation/libero/editor
Scholastica: https://scholasticahq.com/resources/?type=all
Scalar: https://scalar.me/anvc/scalar/
PubPub: https://help.pubpub.org/
Manifold: https://manifoldscholar.github.io/manifold-docusaurus/docs

Contacts

OJS/PKP: https://pkp.sfu.ca/contact-us/
Janeway: https://janeway.systems/contact
Flax, Ketida, Kotahi, Libero Reviewer: https://coko.foundation/team/
Digital Commons: https://bepress.com/contact-us/
Meru: https://www.nglp2022.org/contact
Scholastica: https://scholasticahq.com/contact/
Scalar: https://scalar.me/anvc/contact/
PubPub: https://www.pubpub.org/about
Manifold: https://manifoldapp.org/community