



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

Rules of Participation



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PREAMBLE

OPERAS – open scholarly communication in the European research area for the social sciences and the humanities – is a research infrastructure incorporated as an international non-profit association (AISBL), in Brussels, Belgium. OPERAS membership is open to any organisation in Europe and worldwide, which adopts OPERAS’ principles, abides by its rules of participation and contributes to its actions.

OPERAS’ mission is to coordinate and federate resources in Europe to efficiently address the scholarly communication needs of European researchers in the field of social sciences and humanities.

OPERAS’ vision is to make Open Science a reality for research in the social sciences and the humanities and achieve a scholarly communication system where knowledge produced in the social sciences and the humanities benefits researchers, academics, students and more generally the whole society across Europe and worldwide, without barriers.

PRINCIPLES

As a member of OPERAS, the undersigned organisation:

- supports the development of **open science and open access**, particularly in the social sciences and the humanities,
- agrees to follow the **Principles for open scholarly infrastructures and the FAIR Principles**.

DEFINITIONS

Open Science is defined as:

- Transparency in experimental methodology, observation, and collection of data.
- Public availability and reusability of research data.
- Public accessibility and transparency of scientific communication.
- Using open digital tools to facilitate scientific collaboration within research and between research and society.

Reference documents:

- Dan Gezelter (2009-07-28), “What, Exactly, Is Open Science? | The OpenScience Project”, accessed 30 December 2019, <http://openscience.org/what-exactly-is-open-science/>.
- OECD (2015-10-15), “Making Open Science a Reality”, OECD Science, Technology and Industry Policy Papers, No. 25, OECD Publishing, Paris, <http://dx.doi.org/10.1787/5jrs2f963zs1-en>.

Open Access is defined as:

- Free access to scientific publications with reuse conditions defined by the license attached to the publication.

Reference documents:

- Budapest Open Access Initiative (2002), “Read the Budapest Open Access Initiative”, <https://www.budapestopenaccessinitiative.org/read>.

The Principles for Open Scholarly Infrastructure are defined as:

- Good Governance
- Open Standards
- Fair Data Collection
- Transparent Pricing and Contracts
- Easy Migration
- Succession Planning
- Open Content

Reference documents:

- Geoffrey Bilder, Jennifer Lin, Cameron Neylon (2015-02-23), “Principles for Open Scholarly Infrastructure-v1”, <http://dx.doi.org/10.6084/m9.figshare.1314859>.
- COAR, SPARC (2019), “Good Practice Principles for Scholarly Communication Services”, <https://www.coar-repositories.org/files/COAR-SPARC-Good-Practice-Principles.pdf>.

The FAIR Principles are defined as:

- To be Findable:
 - F1. (meta)data are assigned a globally unique and persistent identifier.
 - F2. data are described with rich metadata.
 - F3. (meta)data are registered or indexed in a searchable resource.
 - F4. metadata specify the data identifier.
- To be Accessible:
 - A1 (meta)data are retrievable by their identifier using a standardized communications protocol.
 - A1.1 the protocol is open, free, and universally implementable.
 - A1.2 the protocol allows for an authentication and authorization procedure, where necessary.
 - A2 metadata are accessible, even when the data are no longer available.
- To be Interoperable:
 - I1. (meta)data use a formal, accessible, shared, and broadly applicable language for knowledge representation.
 - I2. (meta)data use vocabularies that follow FAIR principles.
 - I3. (meta)data include qualified references to other (meta)data.
- To be Re-usable:
 - R1. meta(data) have a plurality of accurate and relevant attributes.
 - R1.1. (meta)data are released with a clear and accessible data usage license.
 - R1.2. (meta)data are associated with their provenance.
 - R1.3. (meta)data meet domain-relevant community standards.

Reference Documents:

- Force11, “The Fair Data Principles”, accessed 27 January 2020, <https://www.force11.org/group/fairgroup/fairprinciples>.

RULES OF PARTICIPATION

By joining OPERAS, the organisation agrees to:

- Abide by the following governance framework and by-laws of OPERAS AISBL:
<https://operas.hypotheses.org/files/2020/01/OPERAS-AISBL-Bylaws-EN.pdf>
- Actively participate in OPERAS’ activities
- Authorize the OPERAS Coordination Team to refer to the organisation as a member of OPERAS

REQUIREMENTS AND COMMITMENTS

To join the OPERAS Consortium, the organisation should meet minimum requirements and commit to a list of actions, described by the organisation in the following online questionnaire:

<https://surveys.ekt.gr/index.php?r=survey/index&sid=829761&lang=en>

Topic	Requirements	Commitments
Transparency	To have provided clear information about its nature, mode of operation, business model, model of governance and scholarly communication practices.	To agree that this information will be shared with other OPERAS members. To update the aforementioned information whenever it is necessary. To provide its best effort to adopt the Best Practices and Standards defined by the relevant OPERAS Special Interest Groups and subsequently adopted by the Executive Assembly.
Open practices	To have conducted an assessment exercise of the organisation against the COAR-SPARC Good Practice Principles for Scholarly Communication Service.	To plan for full adoption of those principles if they are not currently met.
Technical readiness	To describe accurately the organisation’s technical capacity in terms of tools, services and infrastructure used by the organisation in its operation.	To make best efforts to adopt scholarly communication practices and other tools conformant to the state of the art defined by the Special Interest Group Tools and subsequently adopted by the Executive Assembly.
Participation	To have identified and described the envisaged contribution of the organisation to OPERAS and selected Special Interest Groups.	To present and represent OPERAS and its services to relevant stakeholders in the organisation’s environment. To obtain a Letter of Support to OPERAS from the legal representative of the organisation when needed.

LEVELS OF MEMBERSHIP

The organisation chooses to join OPERAS as (tick the corresponding box):

- Observer:** to participate in specific OPERAS activities upon invitation by at least one member of the Executive Assembly, without voting rights.
- Associate Member:** to participate in at least one Special Interest Group upon invitation by the Executive Assembly, without voting rights.
- Ordinary Member:** to participate in at least one Special Interest Group equivalent to 10% FTE commitment in-kind, with voting rights in the Assembly of Commons.
- Core Member:** to participate in the Assembly of Commons and Executive Assembly, equivalent to 20% FTE commitment in-kind, with voting rights in the Assembly of Commons and the Executive Assembly. To support OPERAS AISBL by an annual membership fee of a value of 5,000 euros.
- Supporting Member:** to participate in the General Assembly. To support OPERAS AISBL by an annual membership fee of a value of 10,000 euros.

N.B.: Observer and Associate Member do not need to go through the full application procedure

OPERAS APPLICATION REVIEW PROCEDURE

1. The applicant must have at least one meeting with the Coordination Team and at least one with a member of the Executive Assembly. The meetings can be virtual or face-to-face.
2. The applicant must complete the online submission form:
<https://surveys.ekt.gr/index.php?r=survey/index&sid=829761&lang=en>
and send the OPERAS Rules of Participation (this document) signed by the legal representative of its legal entity.
3. The application file, gathering the interview reports, the online form and the signed Rules of Participation, will be reviewed by the Executive Assembly.
4. The Executive Assembly may seek further clarification as necessary.
5. The Executive Assembly will communicate its decision: accept, reject (upon justification), temporarily suspend the application for more information.

OPERAS (AISBL)

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DECLARATION

By signing this document, I declare to have read this document and to agree, to adopt and respect OPERAS' principles, to abide to its rules of participation and to contribute to its actions. I agree to support the development of open science and open access, particularly in the social sciences and the humanities, and agree to follow the principles for open scholarly infrastructures and the FAIR principles as defined in this document.

Date of Signature:

First Name – Name:

Representing:

Signature: