Action Lines for the Years 2014- 2016 with the Objective of Increasing the Visibility of the SciELO Network Journals and Collections

Preliminary version for discussion by the SciELO Network collection coordinators, 16/09/13 (This preliminary proposal came out of the meeting convened to discuss action lines for the development of the journals indexed in SciELO attended by Patricia Muñoz, CONICYT/Chile, Margarita Ontiveros y Sánchez de la Barquera, CONACYT/ Mexico and Abel L. Packer, SciELO Program / FAPESP which took place in Santiago Chile from 25 – 27 June, 2013)

1. Introduction

As it reaches its 15 years of continuous operation in 2013, the SciELO Network has achieved significant results. The general objective of SciELO is to contribute to the progress of academic research by improving the communication of its results in quality journals. The specific objective of SciELO is to contribute to increasing, in a sustainable way, the visibility, quality, use and impact of the journals it indexes, and in this way, contribute to the development of national capacities and infrastructures for both information and scholarly communication. SciELO's principal roles have been the indexing of academic journals with **high** quality control procedures, the online publication of the full texts of these journals on the Web and in Open Access, the measurement of their performance based on the number of downloads and citations, and the interoperability on the Web with indexes, indexing products and services which deal with academic content.

In 2013, the SciELO Network of national journal collections covered 16 countries, 15 in Ibero-America plus South Africa, which as a whole, index around 1,000 journal titles and publish more than 40,000 articles a year. In total, the network has built up a collection of more than 400,000 articles in fifteen years, which in 2012 handled a daily average of more than 1.5 million accesses and downloads. The SciELO collections as a whole occupy first place in the Webometrics ranking of Open Access portals with each individual collection showing a very good performance. Taken as a whole, the SciELO collections are the principal source of journals which are indexed in the Directory of Open Access Journals (DOAJ). The metadata of the SciELO journal articles, with links to the relevant full text, are updated weekly in Google Scholar, CROSSREF and DOAJ, and

when applicable, in the major international and regional bibliographic indexes such as Web of Science, Scopus, PubMed and LILACS. From October 2013, all the certified SciELO collections will also be integrated into The SciELO Citation Index, which operates within the Web of Knowledge in conjunction with WoS (Web of Science) and other international databases. This is being done both for searching purposes as well as for the generation of bibliometric indicators. The SciELO Network also represents one of the major scholarly communication programs in the developing countries. It also stands out as being one of the principal programs in the field of international cooperation in the publication of Open Access academic journals. In fact, SciELO is a pioneer in the adoption of Open Access.

Notwithstanding the advances made, the SciELO Network faces two great challenges in its future development. The first challenge is to improve the performance of the management and operation of the collections as far as their development is concerned. This needs to be carried out according to the SciELO quality criteria which include, for example, the existence of an active academic committee representative of the academic community which should be responsible for the evaluation of the admission and retention of journals in the collection; the processing and on-time publication of **the latest** journal issues, and the timely adoption of updates to publishing methodologies and technologies.

The second challenge is to improve the **relatively** weak performance of the SciELO Network journals when compared with journals from the developed countries. This comparison is based on bibliometric indicators for citations which are present in international reference indexes such as Journal Citation Reports (JCR) **and which have been calculated** from the Web of Science and the Scimago Journal Ranking which is based on Scopus. In fact, around 90% of the SciELO journals in the JCR and Scimago have an impact factor which is less than the average for their respective subject areas.

Many structural and specific factors have an influence on the relatively weak performance of some of the collections and of a good part of the journals. The management and operation of the collections are affected by the degree of political and financial support that they receive, the extent of the human resources available, the operational infrastructure and of the general performance of the journals.

The performance of the journals is dependent in particular upon the quality and international relevance of the research output that they publish. It is also dependent upon the language in which the articles are published, as well as the predominance of articles written by national researchers **with respect to concerning** the percentage of

articles written in collaboration with foreign academics. In general, the academic journals for the most part continue to operate with editorial processes which require a higher level of professionalism and international presence, and more stable financial models.

For example, in the era of online publishing, delays in publication are no longer acceptable, something which still occurs frequently. The improvement in the quality of journals must pass through a more rigorous peer-review process, through the use of leading edge technologies in editing and publication services, and through the incorporation of advanced dissemination programs which include the use of social networks.

In the SciELO / FAPESP Program, the collections, the learned societies and the SciELO Network journals, individually and as a whole, have over the last few years been developing efforts towards advancing and deepening their professionalism, internationalization and financial sustainability.

This document presents the action lines which will be established with the mutual consent of the SciELO Network coordinators at their meeting on 22nd October 2013 in São Paulo. These action lines will seek to strengthen, hone and broaden the editorial functions and processes which come under the responsibility **of each SciELO** collections, with the objective of contributing to the improvement of the quality and impact of the indexed journals in line with national policies in research and scholarly communication.

The action lines have an implementation window of three years, that is to say, until the end of 2016 and are directed towards strengthening and extending the SciELO Network publication model, by means of perfecting the systems used to evaluate the performance of the collections and journals on the one hand, and the operation of a common platform of services on the other. This platform, which is being set up according to the international state of the art, will embrace all the stages in the management, editing, publication and interoperability of the journals, with the aim of contributing decisively to the professionalization, internationalization and sustainability of the SciELO collections and journals.

The development and operation of the common platform of services of the SciELO Network will make use of modern day Internet based technologies such as cloud computing and mobile devices. It will make use of a continually updated set of solutions, products and services available from national and international companies

that deliver positive value as far as cost, quality and effectiveness are concerned, and which may be made available for all of the SciELO collections and journals.

As far as this particular development is concerned, the SciELO Network will continue to follow its own principles of decentralized collection management, with the collections being integrated with national systems of research and scholarly communication. The collections will publish the most up to date version of the journals in Open Access and in accordance with quality control procedures.

The SciELO Brazil Collection will be responsible for the maintenance of the technological platform, the methodological guidelines, the SciELO Network Portal and the technical secretariat, as well as the online collaboration space and the convening of periodic coordination meetings. All that has been mentioned up to this point requires the active collaboration of the collections which have signed up to the SciELO Network.

It is foreseen that the action lines will be fully implemented in the final months of 2016.

2. Action Lines to Improve the Quality and Impact of the SciELO Journals and Collections.

The SciELO Network collection representatives **define** by mutual consent the following action lines and goals for the development of the SciELO Network, the national collections and the SciELO journals themselves right up to the end of 2016, with the emphasis being placed on the improvement of the quality, visibility and impact of the journals and collections.

- Standardized Indicators for Monitoring the Quality of the Journals and the National Collections.

- Professionalization of the Management, Editorial Functions and Processes

- Internationalization of the Functions, Processes and Contents

- Financial Sustainability

- Strategic Alliances

- Dissemination and Marketing

- Methodological and Technological Platform

The action lines are described in the following sections.

2.1. Standardized Indicators for Monitoring the Quality of the Journals and the National Collections.

The SciELO Collections and especially the journals they index should demonstrate increasing editorial quality and performance, as measured by standardized indicators applicable to the SciELO Network as a whole. The continued presence of indexed journals in a particular SciELO collection will be determined by how its performance develops. In the same way, the continuity of the collections in their certified state will depend on their performance as measured by the standardized indicators.

The performance indicators will take into account editorial management, visibility and impact of the individual journals and the collections as a whole.

The indicators relating to the editorial management of the journals have as their objective the measurement of compliance with the standards that deal with the

presentation, mission and objectives, as well as the make-up and functioning the councils and committees, editorial processes and timeliness of publication.

The indicators dealing with the impact of the collections have as their objective the measurement of the aggregate use of the journals of the collections using the number of original articles, citations received, their presence in social networks and the number of accesses and downloads.

The bibliometric indicators will be multidimensional. One part will be extracted from the SciELO Citation Index from the Web of Knowledge platform, which will allow the citations received from the SciELO journals and the Web of Science to be counted. They will be complemented by the Scimago, Google Scholar, Webmetrics and Altmetrics bibliometric indicators. COUNTER compliant Indicators of accesses and downloads will also be included.

The indicators relating to the management and operation of the collections have as their objective the measurement of the extent to which the SciELO Network standards for certified collections are complied with. This includes the on-time publication of the majority of the journals in Open Access with Creative Commons attribution CC-BY-NC-SA or similar, the continued operation with an acceptable speed of access and the maintenance of updated methodologies and technologies.

The standardized indicators will be drawn up based on the action lines which are described in the next sections of this document.

The performance indicators will help authors, journal editors, and the institutions which are responsible for the coordination, financing and operation of the collections and of the SciELO Network in the implementation and follow-up of the action lines.

2.2. Professionalization of the Editorial Functions and Processes

The contribution of SciELO to the professionalization of the editorial functions and processes includes providing assistance and follow-up to the indexed journals in the structuring and operation of their editorial boards according to the standards defined for the SciELO Network as a whole; it also includes supporting the defining and establishment of the editorial processes and workflows through the common products and services which have been certified by the SciELO Network.

2.2.1. Standards for the Structuring of the Editorial Functions

Editorial functions embrace the management and operation of a journal. The objective of improving editorial management and operation is to increase, in a sustainable way, the quality and impact of the communication of the results of original academic research. The responsibility for editorial functions generally include the following entities:

- A publishing institution which either owns or is responsible for the journal. In this sense, it highlights the learned societies and institutes dealing with the progress of academic research. This function may eventually be carried out by more than one institution.

- An Editor In Chief, responsible for the editorial management of the journal. This function may eventually be carried out by more than one editor.

- An editorial team responsible for the editorial production of the journal which carries out the roles of a secretariat, operational management and in the editing of texts.

- Associate or section editors with responsibility for the evaluation of submissions.

- A list of potential referees of proven experience and appropriate knowledge of the subject areas covered by the journal.

The management of a journal should be directed towards the accomplishment of its mission and objectives and in harmony with its statutes. Amongst other aspects, the statutes establish the process for the selection of the Editor In Chief and the term of office, as well as the system of periodic performance reports which must be presented to the institution responsible for the journal.

The structures of the entities and teams responsible for the execution of the editorial functions must be formalized and published on the portal of the journal concerned. These structures vary from journal to journal, and the entities go under different names. The important thing is that the structures and their names and the *modus operandi* for each journal are formally defined in a document which should be periodically updated (the updating itself should also be defined in the document previously indicated).

Based on what has been previously written, the journals indexed in the SciELO Network collections should provide and publish the following information in an updated form:

- The name of the institution/ s responsible for the journal;

- The mission and objectives of the journal;

- The Editor/ s In Chief, term of office and responsibilities;

- The structure of the editorial body responsible for the management and operation of the journal, indicating the names of each of the entities and their functions and responsibilities;

- A document describing the *modus operandi* of the journal in question which should be periodically updated;

- An annual evaluation of the performance of the journals carried out in conformity with the standard SciELO Network model;

- Contact details.

Making this information public is a compulsory requirement for admittance and retention of the journals in the SciELO collections. The portals of the individual journals in the SciELO collections will publish all this information with an indication of the date on which it was updated.

The management of each journal should seek to optimize the *modus operandi*, the composition and the exercising of the editorial functions so that these offer a professional response to the journal mission and objectives and minimize the operating costs. In this regard, the SciELO Network will contribute a platform of common services in the areas of management, indexing, editing, publication and interoperability which will help to facilitate and reduce the journal operating costs.

2.2.2. Standards for the Structuring of the Journal Submission Evaluation Processes

The editorial processes consist of the following stages: delivery of the submissions by the authors themselves, their receipt by the journal, evaluation of the submissions, revision of the texts, **design and layout**, formatting in XML, production of the HTML, PDF and EPUB files, publication and interoperability.

All these processes must be supported by online processing systems. The SciELO Network offers its journals common solutions to all these services which are in conformity with the international state of the art.

The delivery, receipt and processing of the submissions are carried out in accordance with what has been set out in the document titled "Instructions for Authors", which
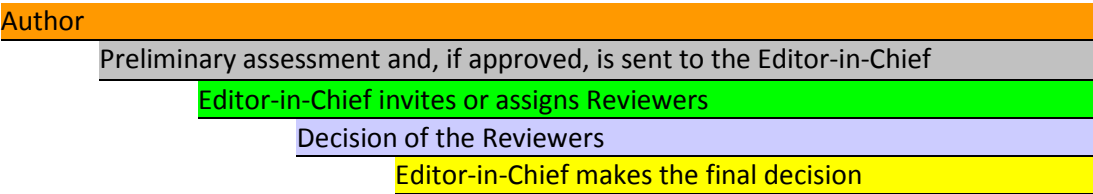
must be revised and updated a minimum of once a year. The publication of the "Instructions for Authors" is obligatory for a journal to be eligible for indexing in a particular SciELO collection. The portals of the journals in the SciELO collections will publish the updated version of the "Instructions for Authors".

The "Instructions for Authors" must include as a minimum, the following components :

- Objectives of the journal, areas of knowledge and scope of the research it publishes.

- Types of documents accepted; original articles, reviews, etc.

- Description of the type of documents accepted.

- Procedure for the evaluation of submissions

- Conditions that research must address.

- Program/ s used for the design and layout of the texts.

- Standards governing citations and bibliographic references.
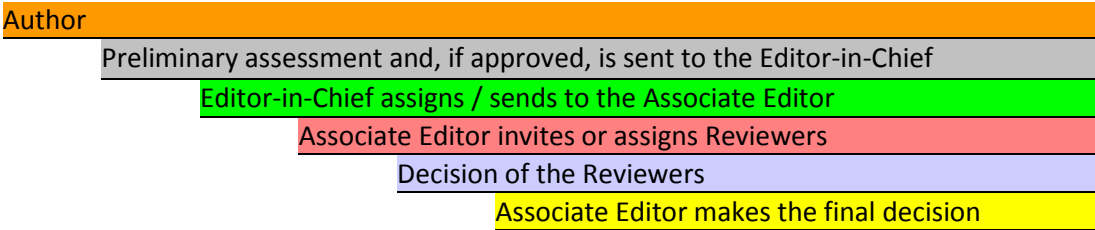
- Costs associated with publication.

The updated processing flow for submissions adopted by the journals must be made available publicly using one of the following schema recommended by the SciELO Network or by using schema derived from this, depending on the final decision taken by the Editor in Chief or the Associate Editor (or Editor responsible for the subject area concerned):

Schema 1 – Schema where the final decision is dependent on the Editor in Chief
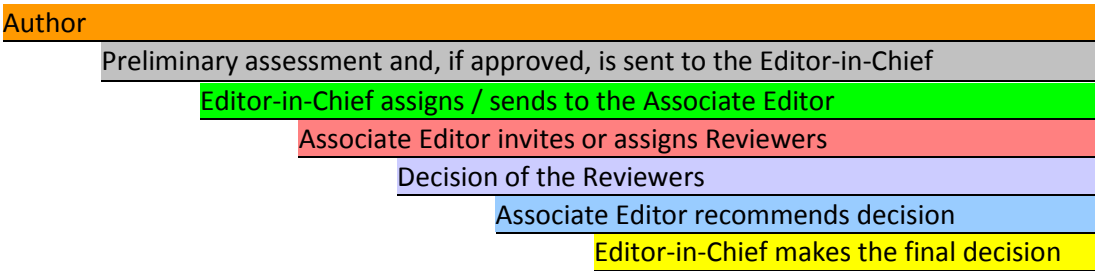
| Author |
| Preliminary assessment and, if approved, is sent to the Editor-in-Chief |
| Editor-in-Chief invites or assigns Reviewers |
| Decision of the Reviewers |
| Editor-in-Chief makes the final decision |

Schema 2 – Schema where the final decision is dependent on the Associate Editor or Subject Editor

Author	
	Preliminary assessment and, if approved, is sent to the Editor-in-Chief
	Editor-in-Chief assigns / sends to the Associate Editor
	Associate Editor invites or assigns Reviewers
	Decision of the Reviewers
	Associate Editor makes the final decision

Schema 3 – Scheme where the final decision is jointly made by the Editor in Chief and the Associated Editor

Author	
	Preliminary assessment and, if approved, is sent to the Editor-in-Chief
	Editor-in-Chief assigns / sends to the Associate Editor
	Associate Editor invites or assigns Reviewers
	Decision of the Reviewers
	Associate Editor recommends decision
	Editor-in-Chief makes the final decision

2.2.3. Common Editing, Publication, Interoperability and Evaluation Services

The common services operated by the SciELO Network and available to the journals will progressively cover the processes of the online management of submissions, revision and editing of texts, design and layout of the texts for XML, HTML, PDF and EPUB, publication, interoperability and evaluation of journal performance by accesses, downloads and citations received.

As far as is possible, the services will be provided directly via the SciELO platform at no cost to the journals. Nevertheless, specialized services could also be provided by private companies based in the countries served by the SciELO Network, or by international companies. The costs will be covered by the national collections or by the journals themselves.

Services which are not provided by SciELO directly will be the responsibility of the companies certified according to criteria to be adopted for each of the services. The SciELO Network will not certify individuals or **unofficial** services.

The services which will be operated, mediated or certified by SciELO are listed below. The objective will be to strengthen the professionalization of the SciELO journals. Other services may be added to this list.

a. Online Management of Submissions

The SciELO Network through it collections will operate services for the online management of article submissions. Other services, in addition to those provided by the SciELO platform, may be certified.

The main condition for the adoption of a submissions management service that it provide four control statistics: the number of submissions received, the number rejected in the preliminary analysis, the number approved / rejected and the average time of peer review. Desirable characteristics also are an interface with a plagiarism identification system, locatin reviewers and the collection of publication fees.

b. Translations from and into Portuguese, Spanish and English

A priority action line of SciELO is internationalization that, among other strategies, includes the gradual adoption of the English language for the communication of research with the aim of expanding its international visibility. All article texts must have at least the title, abstract and keywords in English. It is the journal publisher that has the final decision of whether or not to publish in English, in line with its mission, objectives, subject area and intended audience for the research that it publishes. It is worth mentioning, however, that journals are increasingly adopting English as either their only language of communication of journal content or are using a multilingual format together with Spanish or Portuguese.

In many cases the article texts need to be translated. Therefore, the SciELO Network will certify translation services from and into Spanish, English and Portuguese. The certification process will consider the background information provided by the journals of the network.

c. Reviews of the Spanish, Portuguese and English.

The SciELO Network will certify text revision services giving preference to those performed by natives speakers of the language of the text to be reviewed, and who also have a thorough knowledge of the subject areas in question.

d. Design and layout

The design and layout services will be directed towards defining specific templates for a particular journal or ones that can be reused by any journal.

e. Markup of the texts in XML and generation of the HTML, PDF and EPUB files according to predefined templates.

The texts will be structured in XML in the SciELO platform to facilitate storage in databases, as well as to enable better use of the texts by identifying all of their elements, for example, the metadata that identify their **respective bibliographic references**, sections, paragraphs, tables, figures, and funding sources, among others.

As of 2013, SciELO is adopting the SciELO Publishing Schema V1.0 based on the NSI/NISO Z39.96-2012, JATS: Journal Article Tag Suite (version 1.0) standard for the markup of full text. This will make it easier to generate other formats such as HTML, PDF and EPUB, and to identify data elements for indexing, linking and retrieval.

The recommendation of SciELO is that the approved submissions, once they are reviewed and given the go-ahead by the editor responsible for this task, are marked-up in XML, from which are generated, as automatically as possible and in accordance with the adopted template, the HTML, PDF and EPUB files.

The SciELO Network will work as an intermediary to full text markup services and the generation of the respective HTML, PDF and EPUB files.

f. Online publication on the Web for access by computers and mobile devices

The SciELO Network will operate standard online publishing services for the journals to allow for **access to the published contents** by computers **such as PC's and** by mobile devices. This is one of the traditional functions of SciELO, enhanced by access services to tablets and smartphones

g. Metadata interoperability services

The SciELO Network will operate interoperability services for the collections and journals within the SciELO environment, and with external bibliographic indexes and

search services on the Web. Therefore, SciELO will adopt the principal protocols and standards in existence for interoperability.

The SciELO collections will maintain regular interoperability with the following multidisciplinary bibliographic indexes: CROSSREF (all of the articles), Google Scholar (all of the articles), SciELO Citation Index (all of the journals that meet the criteria), WoS (articles from the journals indexed in WoS), Scopus (articles from the journals indexed in Scopus), DOAJ (all of the journals and articles), and with the following thematic bibliographic indexes: PUBMED, LILACS, and AGRIS. Other indexes will be added as deemed necessary.

h. **Services for monitoring and evaluating the performance of the journals based on accesses, downloads and citations.**

The SciELO network will operate and intermediate standard services for the measurement of the number of access, downloads, citations given and received, and the number of references in social networks at the article, journal and collection level.

The recording and calculating of accesses and downloads will be compliant with the COUNTER standards (Counting Online Usage of Networked Electronic Resources).

The performance of the SciELO collections on the Web will be measured by webometric methodology, and will be based on the ranking of the Top Portals of the Webometrics service operated by the Consejo Superior de Investigaciones Científicas (CSIC) in Spain.

Regarding the performance of the SciELO journal articles on the Web, this will be measured by the altmetrics methodology of the services contracted from altmetric.com and/or other companies.

The performance of the SciELO journal articles as measured by citations received will be done in a standard way using the SciELO Citation Index, part of the Web of Knowledge platform. The Scimago and Google Scholar indicators will be considered as complementary forms of measurement.

The access, downloads, citation, webometric and altmetrics indicators will be updated and published regularly, as applicable, in the SciELO Network Portal, in the portals of the national collections, in the portals of the journals and in the services associated with the articles.

Based on the annual evaluation results, the SciELO Network and its collections will consider establishing, at the end of 2014, awards and recognition for outstanding performance of collections, journals and authors.

2.2.4. Open Access with attribution CC-BY-NC-SA

The SciELO Network publishes journal collections in Open Access. However, the formalizing of this Open Access is done by using the Creative Commons system of licenses with attribution CC-BY-NC-SA which states that the contents can be accessed and copied, distributed and transmitted on condition that they be used only for non-commercial purposes, that proper attribution of the contents is given in the manner specified by the author or licensor, and that the contents, even if altered, transformed, or built upon must be distributed under the same license as the original. The journals can adopt more open attributions such as CC-BY. They can, however, adopt attributions similar to CC-BY-NC-SA for their contents. In all cases it is desirable that the **collection coordinators** conduct workshops and **presentations** about the Creative Commons system of licenses to guide decisions on the registration of their journals.

2.2.5. Preservation

The SciELO collections of the SciELO Network can opt for the preservation of their contents with CLOCKSS or another service. Each collection is responsible for the associated costs. The collections must have their contents preserved by CLOCKSS or another such service by the end of 2015.

2.2.6. Training Services

The SciELO Network **shall** offer the collection teams, the staff of the indexed journals and the authors regular training courses in various technical and management issues. It should therefore develop a regular training program for the entire network beginning in 2014.

2.2.7. Publisher certification

In 2015, the SciELO Network shall establish a test for the assessment of editorial management skills which can be applied to the publishers of the journals in order to understand and diagnose their level of preparation and knowledge, information that will be useful to the institutions responsible for the publications. They will be able to rely on this data concerning the experiences of their editors and/or candidates for the position to support them with adequate training programs.

2.3. Internationalization of the functions, processes and contents.

The internationalization of the functions and processes of the editorial teams of the SciELO journals is made up of the set of conditions and practices that facilitate the international presence of the journals and which is reflected in their visibility and impact internationally as measured by the number of accesses, downloads, foreign authors and citations originating globally. Internationalization is required for all the journals, but the level of internationalization will vary from collection to collection, and from journal to journal according to the discipline and scope of the research they publish.

The following indicators of internationalization are considered at the journal level:

a. the proportion of researchers from other countries which act as editors, associate editors and reviewers (referees).

b. The percentage of articles published in English.

c. The percentage of articles with authors with foreign affiliations.

The following aggregate indicators of internationalization of the journals are considered at the collection level:

a. The number/percentage of journals published completely in English, completely multilingual (in English and Spanish; in English and Portuguese; in English, Spanish and Portuguese); partially multilingual with at least 30% of the articles in English.

b. The number/percentage of articles published in English, bilingual in Spanish and English, bilingual in Portuguese and English, and multilingual in Spanish, English and Portuguese.

c. The number/percentage of authors with foreign affiliations.

2.4. Financial Sustainability

The professionalization and strengthening of the financial sustainability of the national collections and indexed journals is a priority action line for the SciELO Network.

The sustainability of the SciELO Network is composed, on the one hand, of the regular financing of the management and operating activities of the collections and, on the other hand, of the journals individually. The search for sustainable funding for the

development and operation of both the collections and the journals is one of the priority action lines for the SciELO Program.

One of the characteristics of SciELO is its integration with the national research and scholarly communication infrastructures in the countries where it operates. As such, the financing of the academic journal collections should be associated with the policies which support research and scholarly communication in each of the countries.

The financing of a collection is the responsibility of the institution or institutions that head the SciELO operations at the national level. This generally means the agencies that support research and scholarly communication, and other public institutions such as ministries of education and of science and technology. This financing should be, as much as possible, part of a program or institutional plan that ensures the flow of resources annually. The collections should document their system of financing in the pages of their Webs sites.

The financing of the journals is the responsibility of the publishing institution that, in general, brings together different sources of funding: the publishing institution itself; national programs of agencies which support research, science and technology and scholarly communication; specific projects; sponsorships, advertising and author fees. This combination of funding sources varies from country to country and from journal to journal.

The SciELO collections have objectives and important features which justify their funding by these agencies: the development of national research capacities, capabilities and infrastructures; quality control; and publication in Open Access and increased visibility. The improvement and professionalization of the SciELO collections proposed in this document **should** contribute to the progressive improvement of the systems of financing of the collections and the journals, according to the conditions prevailing in each country.

Meanwhile, one of the objectives of SciELO, working in a network and with collections of quality journals, is to minimize fixed costs by using a common platform for indexing, publishing and disseminating the academic journals. The collections must develop cost models for certified services of editing and publishing according to national conditions.

To monitor the state of financing of the journals, the collections should conduct a standard survey with publishers to identify the make-up of the budgets of each of the journals.

The following indicators of financial sustainability will be considered at the collection level:

a. The existence of national policies or programs to support the development of national academic journals.

b. The participation of the corresponding SciELO Collection in the national programs that fund research and scholarly communication.

c. The existence of an annual operating budget for the SciELO Collection.

d. The existence of an updated cost model of the available services certified for the SciELO journals for editing, publication and dissemination.

e. Conducting an annual survey regarding the funding of the SciELO journals.

The following indicators of financial sustainability will be considered at the journal level:

a. The participation of SciELO journals in the national programs that fund research and scholarly communication.

b. The percentage of journals that use the editing and publication services certified by the SciELO Network.

c. The percentage of journals by funding source, obtained from the annual survey on the financing of SciELO journals.

2.5. Strategic alliances

The future development of the SciELO Network, of each one of its collections and of the journals themselves will be strengthened with national, regional and international alliances that will strengthen the presence and impact of the SciELO Network and of the indexed journals.

The following are cases of international cooperation that the SciELO Network, with the support of its collections, should strengthen in the coming years:

a. Multi-disciplinary and thematic indexers, with the aim of expanding the **current** presence of the metadata in the SciELO journals, by establishing and operating automated systems for the harvesting, transfer and exchange of metadata.

b. Bibliometric and scientometrics services, with the objective of expanding the availability of the contents of the SciELO collections and journals for their inclusion in the production of bibliometric indicators and as source data for research.

c. Companies and public and private services in editing, publication and interoperability, with the aim of continuing to maintain the professional level of the common platform of SciELO services updated.

d. Commercial publishers, with the aim of promoting the indexing and co-publication in Open Access of the journals of the countries that form a part of the SciELO Network.

e. Cooperation with **Learned Scholarly/Academic Societies,** with the aim of strengthening their policies and programs in academic publication.

f. National organizations in Science, Technology and Innovation, with the aim of strengthening the policies and programs that support scholarly communication and bilateral and regional cooperation in favor of the development of the SciELO Network.

g. International organizations, with the aim of strengthening the international cooperation of the SciELO Network and its **nature** as a global public good, with emphasis on the World Health Organization through BIREME/PAHO, and UNESCO through the Information Society Division of the IDB and FAO.

Indicators relative to strategic alliances will measure the level and quality of the relationship of the bodies listed above with the SciELO Network, its collections and journals.

2.6. Dissemination and Marketing

The development and future operation of the SciELO Network must have a defined marketing plan covering the SciELO Network, the SciELO collections and the journals individually. The plan should address the different dimensions of marketing and dissemination, with common actions as well as specific ones for each collection and journal. Among the marketing activities are the production of press releases for new journal issues and articles, and participation in social networks. The complete marketing plan should be ready and approved before the end of June 2014 and all the SciELO collections must have their versions ready for execution in the last months of 2014.

The dissemination and marketing indicators will be defined from the Marketing Plan.

2.7. The Methodological and Technological Platform

The methodological platform of the SciELO Network should be documented by the end of 2014 with an update to the existing guidelines and the elaboration of new guidelines in Portuguese, Spanish and English. The methodology and the guidelines follow international standards of information and scholarly communication. The methodology includes, among other elements, the criteria and procedures for indexing journals, the criteria for the certification of collections, the structure of the data elements (metadata) **of the descriptive record and cataloging of the journals,** the structure of the data elements of the full texts in XML format (DTD), standards and interoperability procedures.

The SciELO technological platform includes, as a minimum, the management of the functions of indexing, markup of the texts, loading of the texts in XML into databases, online publication, generation of bibliometric indicators, and interoperability. The technological platform will be extended progressively with the development and / or adaptation of the editorial management functions to the new model.

The development and distribution of systems and software applications in the SciELO Network will follow the following principles, methodologies, standards and procedures:

- Development based on Open Source.

- Applications available under the FreeBSD2-clause license.

- Public access to all the **data** by means of standardized API (Application programming Interfaces).

- Progressive application of virtual services and cloud computing with options of:

  - Centralized control of services and concepts based on the concept of Software as a Service (SaaS).

  - Possibility of using a hybrid infrastructure, combining one's own hardware resources with virtual resources (IaaS).

- Monitoring systems of available resources and online operating performance of the collections through proprietary tools or contracted services.

- Use of social repositories and of source code of the systems and applications to maximize the ease of cooperation in the development of systems and applications.

This policy should encourage the emergence of development groups in the SciELO Network countries to strengthen cooperation and development of systems and applications.

Postscript

This document will be discussed in October 2013 during the SciELO 15 Years Conference. In this context, the measurable management indicators for the operation of the SciELO collections together with the criteria for the certification of editors, both of which have been mentioned in this document, will be identified.

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