

Autumn Training School

Development and Promotion of Open Access to Scientific Information and Research (September 19–20, 2014, Veliko Tarnovo, Bulgaria), organized in the frame of DiPP2014

The autumn training school Development and Promotion of Open Access to Scientific Information and Research is organized in the frame of the *Fourth International Conference on Digital Presentation and Preservation of Cultural and Scientific Heritage—DiPP2014* (September 18–21, 2014, Veliko Tarnovo, Bulgaria, <http://dipp2014.math.bas.bg/>), **organized under the UNESCO patronage**. The main organiser is the Institute of Mathematics and Informatics, Bulgarian Academy of Sciences with the support of **EU project FOSTER** (<http://www.fosteropenscience.eu/>) and the P. R. Slaveykov Regional Public Library in Veliko Tarnovo, Bulgaria.

Objectives and strategy: The main objectives of the Autumn Training School *Development and Promotion of Open Access to Scientific Information and Research* is to train young and experienced researchers, managers, regional academic and research organisations in the integrating of open access (OA) and open data principles and practices into the current research work-flow in Bulgarian and South-East Europe. In suitable and intuitive ways the lecturers will present several workable strategies, business models, work plans, best practices and examples of implementation of the open access and open science paradigm for ubiquitous science sharing, dissemination and promotion. Special attention will be given to the presentation of successful initiatives and projects for open access, open data sharing and open science; strategies for the OA promotion; copyright and licenses under OA; best practices and examples of policies for the development and promotion of open access at the national and institutional levels, etc. The training will focus on how to organize and maintain OA repositories in academic and research organization, how to practice OA, from writing an article to publishing/depositing in OA repositories and sharing data, target content for OA, OA repositories interoperability and integration, etc.

The training event aims to contribute to the support of the dialogue between academic staff, research project managers, policy-makers and staff working in research

funding bodies and could initiate future joint training and dissemination activities within their institutions and/or disciplinary communities.

Lecturers:

In the autumn training school Development and Promotion of Open Access to Scientific Information and Research the main lecturers will be:

Eloy Rodrigues is the Director of the University of Minho Documentation Services. In 2003, Eloy lead the project to create RepositóriUM - the institutional repository of Minho University and at the end of 2004 he drafted the formal policy of Minho University on open access to its scientific output. One of the main focus of Eloy's current activity is promoting and advocating Open Access and institutional repositories in Portugal and in the Portuguese speaking world. In Portugal, Eloy leads the technical team at Minho University that is being developing the RCAAP (Repositório Científico de Acesso Aberto de Portugal = Portugal Open Access Science Repository) project since 2008. Eloy was member of the EUA (European University Association) Working Group on Open Access, representing the Portuguese Rectors Council, chairs the Repository Interoperability Working Group of the Confederation of Open Access Repositories (COAR) and has being coordinating the participation of University of Minho in various FP7 funded projects (DRIVER, NECOBELAC, OpenAIRE and OpenAIREplus, MedOANet, PASTEUR4OA and FOSTER), related with Open Access and repositories.



DSc. Peter Stanchev is currently professor at Kettering University, Flint, Michigan, USA and professor and chair of department at the Institute of Mathematics and Informatics, Bulgarian Academy of Sciences, Sofia, Bulgaria (<http://paws.kettering.edu/~pstanche/>). He has published 2 books, more than 200 chapters in monographs, journal and conference peer-reviewed papers, more than 200 conference papers and seminars, and has had more than 1350 citations, h-index 18. His research interests are in the field of multimedia systems, database systems, multimedia semantics, education and medical systems. Serving also on many database and multimedia conference programme committees, he is currently editor-in-chief and member of the editorial boards of several journals. He is the Bulgarian representative in the OpenAIRE+ project.



Dr. Radoslav Pavlov (<http://mdl.cc.bas.bg/radko/>) is Professor in Informatics at the Institute of Mathematics and Informatics at the Bulgarian Academy of Sciences (IMI—BAS), Deputy Director of IMI—BAS (2007–present), PhD (Informatics); Chair of the Mathematical Linguistics Department (1977–2012) Senior Researcher within the same organization. His major research interests are in the fields of Human Language Technologies, Knowledge Technologies and Management, Semantic WEB services, Semantic Information Processing, Digital Libraries and Content Management Systems, Algorithmics, e-Learning. In the latest years he was the site leader of 9 national and international projects (ICT-PSP EuDML “The European Digital Mathematics Library“, EU FP7 MONDILEX “Conceptual Modelling of Networking of Centres for High-Quality Research in Slavic Lexicography and Their Digital Resources”). He has published 5 books, more than 170 journal and conference peer-reviewed papers, and has had more than 250 citations.



Iryna Kuchma (<http://www.eifl.net/our-organization>) is the EIFL Open Access programme manager. Her responsibilities include advocacy of open access to research results and support in developing open access policies, training and support in setting up open access journals and open repositories, organizing workshops and other knowledge sharing and capacity building events. Previously Iryna Kuchma worked as an Information programme manager at the International Renaissance Foundation (part of the Soros Foundation network in Ukraine) and coordinated the Arts and Culture Programme there. She is a member of the Directory of Open Access Journals (DOAJ) Advisory Board, DSpace Community Advisory Team (DCAT), IFLA’s Open Access Taskforce, NDLTD (Networked Digital Library of Theses and Dissertations) Board of Directors, the Open Library of Humanities Internationalisation Committee, and PLOS International Advisory Group. She chairs a Working Group “Repository and Repository Networks Support & Training” in the Confederation of Open Access Repositories (COAR) and a Joint ARL/CARL/COAR/LIBER Task Force on Librarians’ Competencies in Support of E-Research and Scholarly Communication.



Dr. Bhanu R. Neupane is trained in Hydrosystems, Water Resources Management and Knowledge Management. He has a PhD in water resources management from Canada and a second Doctorate degree in Business Administration from the International School of Management, France/USA. He joined UNESCO as a Programme Specialist in 2000 and served with the UN system-wide World Water Assessment Programme (WWAP). He was transferred to the UNESCO Office in New Delhi in September 2004, where he was made responsible for the implementation of the International Hydrological Programme and the preparation and design of regional projects and activities on hydrology and water resources. Currently he is working for UNESCO as a Programme Manager for ICT and Sciences and Open Access to Scientific Research. He is also working in the area of Open Data, essentially to improve and increase access to scientific data and information. He is also a visiting professor and regularly teaches courses related to knowledge Management, Multi-criteria Decision-Making, Water Resources management, and Disaster Risk Reduction at Universities.



Dr. Sarah Callaghan is a senior researcher and project manager within the British Atmospheric Data Centre, with interests in data management, data citation and publication, open data and the space time variability of rain fields. She is co-chair of the Research Data Alliance's working group on Bibliometrics for data, part of the Publishing Data Interest Group, co-chair of the CODATA-ICSTI Task Group on Data Citation and a member of the Force11 data citation group which proposed the highly influential Joint Declaration of Data Citation Principles.



Dr. Ivo Grigorov (<http://dk.linkedin.com/in/ivogrigorov/>) is a marine scientist, currently managing a research program on North Atlantic Marine Ecosystems, with keen interest on using knowledge transfer mechanisms to bridge the science-society gap. IG is a passionate advocate for applying Open Science to the full research lifecycle (from open notebooks, to data and publication) and using it as a tool for better science communication, engaging citizen scientists and raising awareness on societal challenges. He is a member of the FP7 FOSTER Steering Group, and currently based at the Danish National Institute for Aquatic Resources (DTU Aqua).



Target groups:

- Academic staff (young and experienced researchers) and project managers from Bulgarian and regional academic and research organisations. Participants from the Bulgarian Academy of Sciences, Sofia University, Veliko Tarnovo University, Burgas Free University, Technical University of Gabrovo, New Bulgarian University, State University of Library Studies and Information Technologies, etc. Participants from South-East Europe academic institutions will be invited. Participants from memory institutions, i.e., public and specialized libraries, archives, museums, galleries, community centres, etc., will also be invited.
- Policy-makers and staff from national research funding bodies from the Ministry of Education and Science, Ministry of Transport, Information Technology and Communications, National Science Fund, etc.

Some participants from the mentioned target groups are project coordinators or research administrators in H2020 program and/or be active in the open data pilot.

Some of the Bulgarian NCPs (interested by *ICT e-infrastructures for access to and management of research data*) also participates in the training school.

In the school more than 50 participants from Bulgaria, Italy, France, Portugal, Korea, Czech Republic, Hungary, Romania, Holland, Ukraine, Panama, etc. participated.

Training programme:

Topics		Short description	Day/ Dura- tion	Lectur- er(s)
Guidelines for development of open access, open data and open science				
Key	aspects	The topic gives an overview of the	19.09,	Iryna

and approaches of open access, open data and open science	key aspects and approaches of open access, open data and open science, emphasising on sharing scientific knowledge for sustainable progress and development.	1 hour	Kuchma
Importance and benefits of open access for science ubiquitous sharing, dissemination and promotion	The topic explains how OA is important for scholars and research institutions and for developing knowledge societies. The benefits of OA topic emphasizes that OA enhances research process, improving visibility and usage of research works, and therefore the impact of research also rises through citation and impact outside the academia.	19.09, 1 hour	Ivo Grigorov
Business models for OA. Copyright and licensing under OA	The topic analyses the traditional business model in scientific communication and describes the new emerging models in the context of OA. <i>Copyright and Licensing</i> part provides an overview of the legal issues and copyright at the heart of OA.	19.09, 1/2 hour	Peter Stanchev
UNESCO&Open Access - achieving the last mile	UNESCO Initiative for Open Access	19.09, 1/2 hour	Bhanu Neupane
Open Research Data - A step by step guide through the research data lifecycle, data set creation, big data vs long-tail, metadata, data centres/data repositories, open access for data, data sharing, data citation and publication	The topic explains the research data lifecycle, data set creation, big data vs long-tail, metadata, data centres/data repositories, open access for data, data sharing, data citation and publication.	19.09 45 min	Sarah Collaghan
Discussion		19.09	Peter

		15 min	Stanchev, Radoslav Pavlov
Policy framework and roadmap for open access, open data and open science	The topic presents an overview of the growth of policies and a critical appraisal of the issues affecting OA policies. Example policies and a roadmap for open access, open data and open science are included.	20.09, 1 hour	Iryna Kuchma
EC policy and recommendations for open access to scientific information and its preservation	The topic discusses EC policy and recommendations for open access to scientific information and its preservation.	20.09, 1/2 hour	Iryna Kuchma
Horizon 2020 mandate on Open Access to publications	The topic provides detailed information on the requirements of the Horizon 2020 mandate of open access to all funded publications (Article 29.2 of H2020 Grant Agreement), and an explanation on how to comply with those requirements.	20.09, 1/2 hour	Eloy Rodrigues
Horizon 2020 Open Research Data Pilot	The topic provides an overview of open research data and research data management, detailed information on the requirements of the Horizon 2020 Open Research Data Pilot (Article 29.3 of H2020 Grant Agreement), and an explanation on how to comply with those requirements	20.09, 1/2 hour	Eloy Rodrigues
Institutional repositories & OpenAIRE on Horizon 2020	The topic discuss and describes the roles that institutional repositories, and the set of OpenAIRE services, can perform helping researchers and research institutions to comply with the requirements of H2020 publications mandate and research data pilot	20.09, 1/2 hour	Eloy Rodrigues
National Information Day "Open access to scientific		20.09,	Ianita

information and data"	1 hour	Zherkova, Mariela Deliverska, Radoslav Pavlov, Peter Stanchev
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The Institute of Mathematics and Informatics at the Bulgarian Academy of Sciences is a leading research and education centre in Bulgaria, a main promoter and developer of the open access and open science paradigm for ubiquitous science sharing and dissemination. IMI—BAS is the organizer of the series of national information days and workshops *Open Access to Scientific Information and Data* in the frame of the ***International Conference on Digital Presentation and Preservation of Cultural and Scientific Heritage*** - DiPP2011, DiPP2012, DiPP2013 and oncoming DiPP2014 (September 18–21, 2014, Veliko Tarnovo, Bulgaria).

The **national information day "Open access to scientific information"**, organized this year invites: 1) representatives of national institutions (including the Ministry of Education and Science, Ministry of Transport, Information Technologies and Communication, Ministry of Culture) responsible for the development of open access policies, 2) representatives of Bulgarian institutions (research institutes and universities) active in the implementation of open access policy and programme, 3) specialists at the UNESCO Department "Open Access and scientific information and ICT and science". The national information day will cover activities such as:

- Discussions on research problems in the field;
- Discussions on possibilities of establishing network of open access repositories;
- Dissemination of partners' best practices;
- Development of study on the harmonization problems of national legislation and practices;
- Discussions on possibilities for developing a training course for PhD students and young researchers in the field; a discussion on possibilities of developing a training course for developers and managers of scientific digital repositories to ensure interoperability;
- Consideration and formulation of recommendations for the development of policies for the promotion of open access.

The IMI-BAS team also works on several international projects in the area of open access to scientific information, viz., "Open Access Infrastructure for Research in Europe" (OpenAire), OpenAire+, EuDML, etc. IMI—BAS is proposing a national project "National Scientific Infrastructure for Development and Dissemination of the Open Access to Scientific Information, Results and Data" in the frame of the national strategy for promotion of open access and open science.

Training school (expected results): The trained groups learned the main concepts for the implementation of OA principles and national OA roadmap, key terms, strategies, business models, work plans, copyright and licenses, best practices, examples and policies for open access, open data and open science. The academic staff (young and experienced researchers) and research project managers practiced OA and acquired knowledge and skills how to write, publish and deposit articles, scientific data and materials in OA repositories, OA repositories maintenance, etc. The policy makers and staff working in funding bodies acquired practical skills for writing OA policies, strategies and plans.