

Open Access to Research Infrastructure: Principals and Policy Development

Two half days of training for PROs in the Western Balkans

29th June and 30th June 2020 14.00 to 17.30 CET

Target participants: management, administrative and research staff of Public Research Organisations (PROs) who are interested in developing and adopting an Open Access Policy for Research Infrastructure (RI) and joining the new Network of Open Research Infrastructures.

'Location': Online with Zoom

Participation is limited and registration is required

Registration at: https://us02web.zoom.us/webinar/register/WN_6GfupmLFRR-Oi28FF7QV8g

Introduction to the topic and training

There is increasing interest in widening access to research infrastructure to external users: these can be researchers from other research institutions and enterprises seeking R&D support. The benefits and impact of 'Opening Access to RIs' range from increased researcher mobility and associated brain circulation, to diversified revenue streams for a PRO and increased innovation and economic development for an economy.

PROs who wish to offer their infrastructure for wider use need to develop and adopt a suitable Open Access RI Policy. These are increasingly based on established Good Practice. In the EU, policies typically reflect the European Commission's Charter for Access to Research Infrastructures as well as national principals, institutional preferences and the specifics of the RI covered. Policies deal with a number of issues including access rights for different user groups and pricing. The latter issue is becoming increasingly important to ensure compliance with State Aid Rules.

The 6 economies of the Western Balkans are in the process of adopting a Protocol on Open Access to Research Infrastructure in the Western Balkans that closely reflects the European Charter. With the leadership and support of the Regional Cooperation Council they are also establishing a **Network of Open Research Infrastructures**. Going forward, PROs with RI in the WB6 will be encouraged to develop and adopt an Open Access Policy. Having such a policy will be a prerequisite for membership of the new Network. It will also shortly become a requirement for participants in some aspects of the next EU research and innovation framework programme Horizon Europe.

This training is designed to raise awareness of the main issues inherent in developing and adopting an Open Access to Research Infrastructure Policy and to build the necessary competencies to do this in three main target groups: management, administrative and research staff of PROs.

An output of this training will be a preliminary draft Open Access Policy to cover aspects of open access to the identified research infrastructure at the participant's home organisation.

As a result of participating in this training, individuals should feel able to further develop the preliminary draft of their OA policy with the support of the trainers who will be delivering consulting support from July until mid-September 2020.

Participants of the training and the Technical Assistance aspect will be able to apply for membership of the new **Network of Open Research Infrastructures**.

Over-view of the Training

Day 1: Introduction to Open Access to RIs

- Policy context, benefits and frameworks
- Definitions: type, scale and value
- Understanding and defining 'Open' access for your own institution.
- Introduction to the model policy
- Highlights of the main topics and issues

Day 2: Creating an Open Access policy

- Defining access, users, RI types and undertaking an audit
- Offering and managing access
- Contractual and intellectual property aspects
- Costing , pricing and State Aid Rules

RCC: Introduction to the planned 'Network of Open Research Infrastructures'

Next steps (Technical Assistance)

Both days will be highly interactive with participants asked to work on an emerging draft of an OP policy and to identify the issues they will need to work on with the experts as part of technical assistance.

Trainers:

Dr. Jelena Angelis



Jelena Angelis is a qualified economist with 17 years of experience in the field of research, innovation and higher education policy formation and implementation. She started her career in early 2002 with SQW Group (UK), continued with the international consulting company Technopolis Group (Estonia) and since 2017 has been working with EFIS Centre (Belgium). Jelena's particular expertise lies in the reviews of national and regional RDI systems, individual research institutions and research infrastructures in the projects for the World Bank, OECD, European Commission, Nordic Council of Ministers, national ministries, government agencies, and universities.

Over the last 10 years her focus within the topic of RIs has been on procedures to ensure their set up and operation, visibility and open access to facilities, as well as the involvement of private sector, and socio-economic impacts of investments into RIs. Jelena is currently a part of the European Commission's DG RTD's High Level Expert Group assessing the progress of ESFRI and Other World Class Research Infrastructures towards implementation and long-term sustainability (which among other criteria includes open access to RIs). In 2017-2018 she was a member of the OECD Expert Group on the socio-economic impacts of RIs.

Dr. Lisa Cowey



Lisa Cowey has been working in the Field of 'Open' Innovation and its developing strands (Open Science, Open Access to Publications and Open Access to Research Infrastructures) since the 1990s. She has both private and public sector experience of innovation and R&D and now works on the interface between the two with a particular on technology transfer, research commercialisation and Intellectual Property Rights. She is the team leader for the ongoing WB EU4TECH PoC.

Lisa has been involved in Open Access Policy development and implementation since 2013 and has most recently worked for the World Bank in Poland on pricing models and State Aid Rules related to OA. From 2017-2019 Lisa led the EU4TECH 'mapping' initiative of infrastructure, equipment and facilities in the WB6 and through the first EU4TECH project she launched an initiative to pilot the adoption of Open Access Policies.

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