Report from the PASTEUR4OA South West Region Meeting of Research Funders

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PASTEUR4OA South West Region Meeting of Research Funders

- PASTEUR4OA South West Region
    - Italy
    - Malta
    - Portugal
    - Spain

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Objectives

- Bring together research funders from the four Member States allowing the exchange of ideas and policy practices among participants;

- Discuss ways to improve existing policies or develop new Open Access policies aligned with the Commission's Recommendation and the H2020 requirements.

Participants

- The 20 attendees represented relevant national research funders and organizations, including:
  - National Research Council (CNR) and CINECA from Italy;
  - Malta Council for Science and Technology (MCST);
  - National Foundation for Science and Technology (FCT) from Portugal;
  - National Research Council (CSIC) and the Ministry for Economy and Competitiveness (MINECO) from Spain;

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Participants

Agenda

- Morning session
    - Introduction to PASTEUR4OA;
    - OA policies (ROARMAP) and policy effectiveness (PASTEUR4OA study);
    - Experience from outside the region (HRB – Ireland),
    - Policy recommendations for research data (RECODE)
- Afternoon session:
    - National policies and legislation (Portugal and Spain);
    - Policy situation and developments in the region
    - Group Discussion
    - Wrap-up

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Policy developments in the region

- Italy - National Research Council (CNR) from Italy is developing an policy for Open Science with focus on Research Data.

- Malta - Malta Council for Science and Technology (MCST) is considering a national OA policy, based on institutional OA policy of University of Malta.

Critical points identified & discussed

- **Monitoring compliance and measuring impact of OA policies**

- **APC's (how to consider them in OA policies)**

- **Embargo periods (how to deal with longer embargo periods)**

Monitoring compliance and measuring impact of OA policies

- Participants expressed their concerns about monitoring publications and compliance during and after the end and formal evaluation of the project/grant.

- There is a need to research about different ways to monitor Open Access policies, considering strategies, tools, sanctions, and ways to track publications.

- How to measure the compliance rate after the end of the project?
  - Linking depositing compliance with the reporting for funding application is the most efficient thing to do. However, in some cases, publications appear two years after the end of the project.

APC's (how to consider them in OA policies)

- Regarding APC's the main issues were about:
  - The existence (or not) of specific funds to support APC's;
  - The definition (or not) of a cap value for APC's;
  - The eligibility (or not) of APC's for hybrid journals.

Embargo periods (how to deal with longer embargo periods)

- How to deal with long embargo periods, and the move of some publishers to extend the embargo periods (pushing researchers to pay APCs in hybrid journals)?
  - Include embargo limits in national "big deal" negotiations;
  - Be flexible with researchers/grant recipients on embargo periods;

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Evaluation from participants

- "As my country does not have a national OA policy yet, I learned what I need to look out for when working on it, and where I can get support from."

- "A true involvement of the participants and a really interesting discussion"

- "We engaged in a very useful exchange of ideas about open access."

- "The discussion session was of utmost importance owing to the fact that it provided the opportunity to identify how various countries are implementing OA and what their main concerns are."

Lessons learnt

- We've planned to organise two regional workshops separately, targeted to research funders in Madrid (Spain) and research performing organizations in Turin (Italy).
- But considering the reduced number of countries, and the existence of several organizations which are simultaneously research funder and research performing organisation, it would be better to have organised both workshops at same time.
- We will try to bring both RF and RPOs in the second workshop, in February 2016

Lessons learnt

- There is still a need for Advocacy and Support materials and activities (including the identification of best practices and development of "recommendations") especially on the critical points identified (monitoring, APCs and embargos) to promote the development and implementation of aligned policies.

Thank you

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