Mojca Kotar
Univerza v Ljubljani

Načrt S



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https://www.coalition-s.org/wp-content/uploads/PR_cOAlitionS_Revised_Guidance_310519.pdf

cOAlition S:

Making full and immediate Open Access a reality

cOAlition S Releases Revised Implementation Guidance on Plan S Following Public Feedback Exercise

(Brussels, 31 May 2019) Today cOAlition S releases revised guidance on Plan S implementation which has been approved by all coalition members. "Plan S is a bold step forward which the European Commission, along with a growing number of national funders, is committed to implement" explained Carlos Moedas, the European Commissioner for Science, Research and Innovation.

Since its launch in September 2018, Plan S has reinvigorated the global debate on Open Access to scholarly

Trenutna določila glede odprtega dostopa v ERA

Obzorje 2020, nacionalna strategija odprtega dostopa

- obvezna odprta dostopnost **recenziranih člankov**, „močno spodbujata“ odprtost monografij, zbornikov …
- pilot za FAIR in odprto dostopne **raziskovalne podatke** („As open as possible, as closed as necessary“)

Guidelines on Open Access to Scientific Publications and Research Data in Horizon 2020
Guidelines on FAIR Data Management in Horizon 2020
Commission Recommendation of 25.4.2018 on access to and preservation of scientific information
Nacionalna strategija odprtega dostopa do znanstvenih objav in raziskovalnih podatkov v Sloveniji 2015–2020

Izpolnitev trenutnih določil glede odprtosti člankov

Zeleni OD = članki objavljeni v naročniških revijah + recenzirani rokopisi shranjeni v repozitorije (**ni stroška za avtorja**):

- © 2018 Založnik
- založnik dovoli shranitev recenziranega rokopisa v **repozitorij**, začasna nedostopnost vsebine (t.i. **embargo**)

Zlati OD = odprte revije (**nekatere zahtevajo plačilo objave, = upravičeni stroški evropskih in nacionalnih projektov**)

- © 2018 Avtor1 et al., CC BY
- licenca CC BY dovoljuje shranitev objavljenega članka v **repozitorij**, vsebina dostopna takoj, raznolika nadaljnja uporaba v obsegu prostih licenc CC

Hibridne revije = posamezen članek v naročniški reviji je odprto dostopen (**plačilo objave, = upravičeni stroški evropskih in nacionalnih projektov**):

- © 2018 Avtor1 et al., CC BY
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Načrt S: popoln in takojšnji odprti dostop do člankov

Avtorji ali univerza obdržijo materialne avtorske pravice na člankih Privzeto licenca **CC-BY 4.0** (tudi CC BY-SA 4.0 in CC0) Posamični primeri z dovoljenjem financerja: CC BY-ND 4.0 Recenzija v skladu s standardi discipline in s COPE		
Članki **v odprto dostopnih revijah ali na odprto dostopnih platformah**	Članki ali recenzirani rokopisi takoj po objavi v naročniški reviji **v repozitoriju brez začasne nedostopnosti vsebine**	**Odprti članki v naročniški/hibridni reviji**, če je z založnikom sklenjena **preoblikovalna pogodba** (PAR - plačilo odprtosti člankov + pravica branja naročniških revij)
Registracija revije/platforme v DOAJ	Registracija repozitorija v OpenDOAR	Registracija pogodbe v ESAC in javna dostopnost vsebine pogodbe

Accelerating the transition to full and immediate Open Access to scientific publications : Part I: The Plan S Principles; Part II: Guidance on the Implementation of Plan S, Part III: Technical Guidance and Requirements

Primeri Publish And Read (PAR/RAP) pogodb (enak znesek za PAR kot predhodno samo za Read/branje)

- Nemčija z Wileyem
- Norveška z Wileyem in z Elsevierjem
- Univerza v Kaliforniji s Cambridge University Press
- Velika Britanija s Springer Nature za revije Springer
- Slovenski konzorcij z ACS za leto 2019

ESAC – evidenca javno dostopnih preoblikovalnih pogodb PAR/RAP

- PAR = izhodišča RKRS za pogodbe z založniki za naslednje pogodbeno obdobje
- Study on Scholarly Read & Publish Agreements, EUA, RKRS sodeluje (25 držav)

Norveški financer Forskningsrådets je član Koalicije S → UNIT* – preoblikovalna pogodba z Elsevierjem

- 44 organizacij

	2018	2019 in 2020
Pogodba za	pravico branja in arhiv 8,86 mio EUR	1.850 odprtih člankov letno v naročniških in odprto dostopnih revijah, pravico branja in arhiv 8,86 mio EUR + 3,85%, + 3%
Dodatno plačilo APC-jev	~ 1 mio EUR (verjetno okoli 350 APC-jev)	ko je presežena kvota 1.850 člankov letno
SKUPNO	ocena 10 mio EUR	9,20 mio EUR v 2019 9,48 mio EUR v 2020

- ~400 revij združenj in 47 revij Cell Press ter The Lancet ni vključenih

*The Norwegian Directorate for ICT and Joint Services in Higher Education and Research

Negotiating with scholarly journal publishers: A toolkit from the University of California

With this toolkit, UC hopes to enable others to do the same, following **UC President Janet Napolitano**'s open access call to action:

„I urge my colleagues at universities nationwide and worldwide to join the University of California in advocating for open access to the groundbreaking research taking place on our campuses and in our laboratories every day. Now is the time to take a stand — together — and launch the next information revolution by ensuring that publicly funded research can benefit all humankind."

The time to reinvest subscription funds into open access by radically rethinking and restructuring publisher agreements is now.

https://osc.universityofcalifornia.edu/2019/06/announcing-the-open-access-tipping-point-workshop/

Office of Scholarly Communication

University of California

About OSC

Campus Resourc

Home | Open Access @ UC | Open Data | Guides for Authors | UC OSC Blog

- Home
- Open Access @ UC
  - Publisher Negotiations
    - Negotiating with publishers toolkit
    - UC and Elsevier
    - UC Libraries Journal Negotiations: FAQs
    - Alternative Access to Elsevier Articles
    - UC and Elsevier: Why It Matters

Announcing the Open Access Tipping Point Workshop, co-sponsored by the UC Academic Senate & Libraries

By Günter Waibel / June 3, 2019

The University of California (UC) is pleased to announce an invitational workshop in Washington, DC, August 28-29, for North American institutions motivated to refactor their current, big-deal commercial publisher agreements to support a sustainable open access transformation. The Open Access Tipping Point workshop is co-sponsored by the UC Academic Senate and Libraries and will be facilitated by members of UC's negotiation team and publisher task force. Also in attendance will be representatives from Germany, Hungary, Norway and Sweden who have experience with negotiating

Načela Načrta S (1)

- **02** The Funders will develop robust **criteria and requirements** for the services **that high-quality Open Access journals, Open Access platforms, and Open Access repositories must provide**;
- **03** In cases where high-quality Open Access journals or platforms do not yet exist, the **Funders** will, in a coordinated way, **provide incentives to establish and support** them when appropriate; support will also be provided for Open Access infrastructures where necessary;

Načela Načrta S (2)

- **04** Where applicable, Open Access publication fees are **covered by the Funders or research institutions**, not by individual researchers; it is acknowledged that **all researchers should be able to publish their work Open Access**;
- **05** The Funders support the **diversity of business models** for Open Access journals and platforms. When Open Access publication **fees** are applied, they must be **commensurate with the publication services delivered** and the structure of such fees must be **transparent** to inform the market and funders **potential standardisation and capping of payments of fees**

Načela Načrta S (3)

- **06** The Funders encourage **governments, universities, research organisations, libraries, academies, and learned societies to align** their strategies, policies, and practices, notably to ensure transparency.
- **07** The above principles shall apply to all types of scholarly publications, but it is understood that the timeline to achieve **Open Access for monographs and book chapters** will be longer and requires a separate and due process;
- **08** The Funders **do not support the 'hybrid' model of publishing**. However, as a transitional pathway towards full Open Access within a clearly defined timeframe, and **only as part of transformative arrangements**, Funders may contribute to financially supporting such arrangements;

Načela Načrta S (4)

- **09** The Funders will **monitor compliance and sanction non-compliant** beneficiaries/grantees;
- **10** The Funders commit that when assessing research outputs during funding decisions they will **value the intrinsic merit of the work and not consider the publication channel, its impact factor (or other journal metrics), or the publisher**.

Časovnica

- „ cOAlition S is committed to fulfil the specific target set out in Plan S: publications resulting from research funded by cOAlition S members' grants **under calls published as of 1 January 2021 (or earlier at individual members' choice)**, must be published in Open Access venues (journals or platforms) or made openly and immediately available in an Open Access repository. “
- „The timeline for implementation of Plan S will vary among member organisations. As a minimum requirement, cOAlition S members must apply the Plan S principles **at the latest in calls published, or application deadlines, after 1 January 2021.** cOAlition S encourages its members who are in a position to do so, to implement Plan S **on all grants awarded from January 2021**.“

https://www.uni-lj.si/raziskovalno_in_razvojno_delo/odprta_znanost/

Univerza v Ljubljani vljudno naproša Javno agencijo za raziskovalno dejavnost Republike Slovenije za usmeritve, ki jih Agencija lahko poda v tem obdobju, za ravnanje glede objavljanja člankov iz raziskav, sofinanciranih s strani Agencije, v letu 2019, da bodo s temi članki izpolnjena določila Načrta S po 1. 1. 2020.

Glede objavljanja znanstvenih člankov, nastalih v okviru raziskovalnega dela, ki ga sofinancira ARRS, je najprej potrebno slediti načelom odprtega dostopa do znanstvenih informacij v skladu z Nacionalno strategijo odprtega dostopa do znanstvenih objav in raziskovalnih podatkov v Sloveniji kot to določa 58. člen Pravilnika o postopkih (so)financiranja in ocenjevanja ter spremljanju izvajanja raziskovalne dejavnosti (Uradni list RS, št. 52/16 in 79/17), že zdaj pa je zaželeno upoštevanje aktualnih Navodil za izvedbo Načrta S.

ARRS bo kot pristopnica Koalicije S sledila morebitni posodobljeni različici smernic za izvajanje Načrta S. Raziskovalno sfero in širšo javnost bomo o izvedbenih načelih in morebitnih spremembah, t.j. posodobljeni različici smernic za izvajanje Načrta S obveščali sproti preko spletne strani ARRS.

Konferenca o odprti znanosti, FF, 22. 5. 2019

Ura	Trajanje	Ime, priimek, organizacija	Tema/naslov predavanja
10.00	15 min.	**prof. dr. Roman Kuhar**, dekan Filozofske fakultete, Univerza v Ljubljani **prof. dr. Zoran Stančič**, vodja Predstavništva Evropske komisije v Republiki Sloveniji	Pozdravna nagovora
10.15 –11.00	5 min.	Moderator: **dr. Tomaž Boh**, Ministrstvo za izobraževanje, znanost in šport, generalni direktor Direktorata za znanost	**Odprta znanost v Evropskem raziskovalnem prostoru**
	40 min.	**prof. ddr. René von Schomberg**, Evropska komisija, Generalni direktorat za raziskave in inovacije	
11.00 –11.45	5 min.	Moderator: **prof. dr. József Györkös**, direktor Javne agencije za raziskovalno dejavnost Republike Slovenije	**Načrt S**
	40 min.	**prof. dr. David Sweeney**, izvršni direktor Research England, član izvršne skupine Načrta S pri Science Europe	
11.45- 12.15	30 min.	Odmor za kavo	
12.15 –13.00	5 min.	Moderator: **dr. Branimir L. Leskošek**, Univerza v Ljubljani, Medicinska fakulteta, ELIXIR Slovenia	**FAIR in odprto dostopni raziskovalni podatki**
	40 min.	**dr. Ingrid Dillo**, namestnica direktorja DANS (Data Archiving and Networked Services) in koordinatorica projekta FAIRsFAIR	
13.00 –13.45	5 min.	Moderator: **prof. dr. Žiga Turk**, Univerza v Ljubljani, Fakulteta za gradbeništvo in geodezijo, član skupine strokovnjakov na visoki ravni za Evropski oblak odprte znanosti 2017–2018	**Evropski oblak odprte znanosti (EOSC)**
	40 min.	**dr. Juan Bicarregui**, vodja sektorja za podatkovne storitve Science and Technology Facilities Council (STFC), koordinator projekta EOSCpilot, član Izvršilnega odbora Evropskega oblaka odprte znanosti	

OpenAIRE

Vrednotenje raziskovalne dejavnosti

- Koalicija S, 31. 5. 2019: „cOAlition S supports the principles of the San Francisco Declaration on Research Assessment (**DORA**) **that research needs to be assessed on its own merits** rather than on the basis of the venue in which the research is published. **cOAlition S members will implement such principles in their policies by January 2021.** “
- Tudi **Leiden Manifesto**, **pobuda National Academies of Sciences, Engineering and Medicine (ZDA)**
- **DORA** (2012): preiti iz vrednotenja na ravni revij na vrednotenje na ravni člankov

→ **Usklajenost vrednotenja na univerzah in financerjev**

2019 EUA Workshop on Research Assessment in the Transition to Open Science, 14. 5. 2019

Welcome address

Why revisit research assessment?

- Martine Rahier, Vice-President of EUA and former Rector of the University of Neuchâtel, Switzerland
- Jean-Pierre Finance, Chair of the EUA Expert Group Science 2.0/Open Science and former President of the University of Lorraine, France

Keynote addresses

Revisiting research assessment approaches

- Stephen Curry, Chair of the San Francisco Declaration on Research Assessment (DORA) Steering Committee

Incentives and rewards for researchers in the transition to Open Science

- Sabina Leonelli, Expert in the Mutual Learning Exercise "Open Science: Altmetrics and Rewards"

University perspective on revisiting research assessment

- Rik Van de Walle, Rector of Ghent University, Belgium

Plenary session

Responsible rewards and incentives for research careers

- Paul Wouters, Chair of the European Commission Expert Group on Indicators and Director of the Centre for Science and Technology Studies, Leiden University, Netherlands
- Stephan Kuster, Secretary General, Science Europe
- Eva Mendez Rodriguez, Chair of the Open Science Policy Platform (OSPP) and Deputy Vice-President for Scientific Policy and Open Science of Charles III University of Madrid, Spain

Presentation

EUA-Science Europe Joint Statement on "Join Efforts to Improve Scholarly Research Assessment Methodologies"

- Stephan Kuster, Secretary General, Science Europe
- Martine Rahier, Vice-President of EUA and former Rector of the University of Neuchâtel, Switzerland

Plenary session

New and innovative approaches to research assessment

The European University Association and Science Europe Join Efforts to Improve Scholarly Research Assessment Methodologies

https://eua.eu/resources/publications/830:the-european-university-association-and-science-europe-join-efforts-to-improve-scholarly-research-assessment-methodologies.html

14 May 2019

EUA and Science Europe are committed to working together on building a strong dialogue between their members, with a view to:

- support necessary changes for a better balance between qualitative and quantitative research assessment approaches, aiming at evaluating the merits of scholarly research. Furthermore, novel criteria and methods need to be developed towards a fairer and more transparent assessment of research, researchers and research teams, conducive to selecting excellent proposals and researchers.governments and public authorities to guarantee scholars and students the rights that constitute academic freedom, including the rights to freedom of expression, opinion, thought, information and assembly as well as the rights to education and teaching;

- recognise the diversity of research outputs and other relevant academic activities and their value in a manner that is appropriate to each research field and that challenges the overreliance on journal-based metrics.universities, funding agencies, academies and other research organisations to ensure that all researchers, teachers and students are guaranteed academic freedom, by fostering a culture in which free expression and the open exchange of opinion are valued and by shielding the research and teaching community from sanctions for exercising academic freedom.

- consider a broad range of criteria to reward and incentivise research quality as the fundamental principle of scholarly research, and ascertain assessment processes and methods that accurately reflect the vast dimensions of research quality and credit all scientific contributions appropriately.

EUA and Science Europe will launch activities to further engage their members in improving and strengthening their research assessment practices. Building on these actions, both associations commit to maintaining a continuous dialogue and explore opportunities for joint actions, with a view to promoting strong synergies between the rewards and incentives structures of research funders and research performing organisations, as well as universities.

Hvala za pozornost!

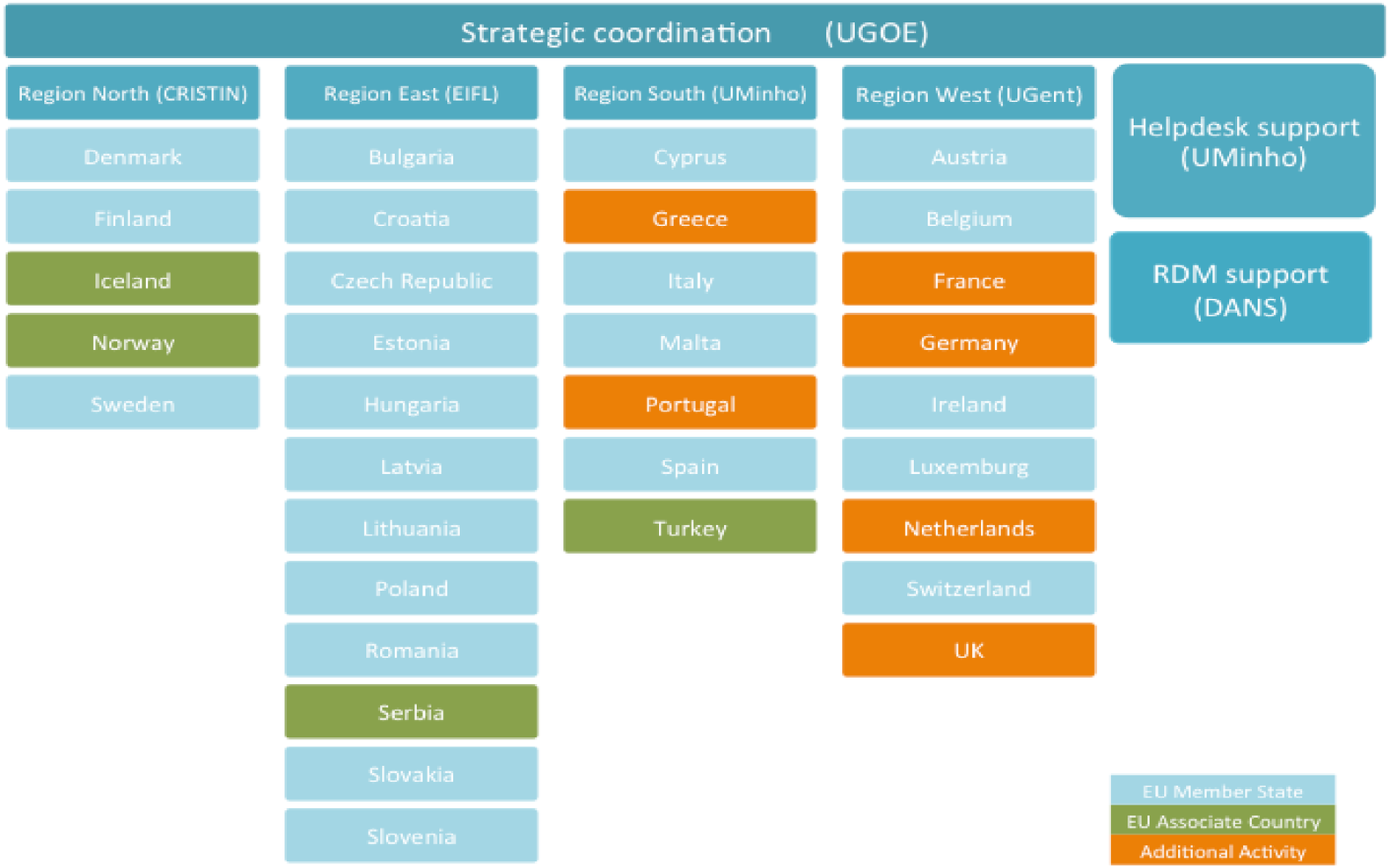
Mojca Kotar

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OpenAIRE – Open Access Infrastructure for Research in Europe

Omrežje nacionalnih točk za podporo odprti znanosti

- ✓ Raznolikost držav zahteva lokalno podporo
- ✓ 34 National Open Access Desks (NOADs)
  - ➢ Usklajenost politik odprtega dostopa
  - ➢ Tehnična podpora
  - ➢ Usposabljanje in podpora za odprto znanost



OpenAIRE

European Commission

OpenAIRE Dashboards

CONNECT
Research communities

EXPLORE
Researchers (All)

PROVIDE
Content providers

DEVELOP
Innovators

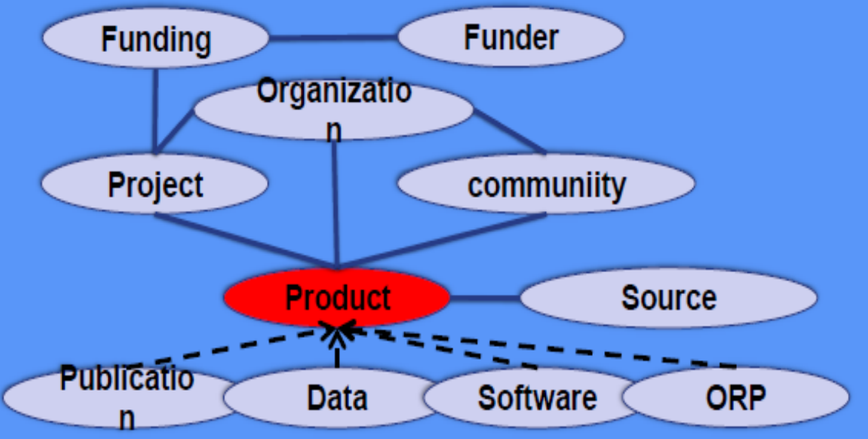
MONITOR
Research managers
Funders

Info Space Services

TERMS OF USE

Brokering
Cleaning
Validation
Harvesting

ScholeXplorer
De-duplication
Inference
Uploading



GUIDE LINES

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