Open Access Forum 2011:

Experts Meeting on the UNESCO Open Access Strategy

22-23 November 2011

Room XVI, Miollis

UNESCO Headquarters, Paris

Report

Note: Prepared and edited by Sanjaya Mishra, with inputs from the rapporteurs of the sessions. Views expressed are those of the participants, and are best representation of the ideas discussed during the meeting. No individual has been identified for the discussion part of the report.

CONTENTS

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Background

The Open Access Forum 2011 (OAF2011) organized by the Knowledge Societies Division (KSD) of the Communication and Information Sector, United Nations Educational, Scientific and Cultural Organization (UNESCO) on 22 and 23 November 2011 facilitated the intellectual gathering of Open Access (OA) evangelists, practitioners and philosophers from around the world to discuss the UNESCO's Open Access Strategy[1] adopted by the General Conference in its 36th meeting in early November 2011. While UNESCO is a relatively new player in the field of Open Access[2], it has been working with library professionals and scientists to increase access to information through its diverse activities in the field of education, science and culture. The UNESCO General Conference in 2009 asked the Director-General to develop and present a strategy on UNESCO's contribution to development and promotion of Open Access, and as a result of the consultations with Member States, a draft strategy[3] was developed that was approved by the 187th Executive Board and then the 36th General Conference committing the Organization's resolve to build knowledge societies through the use of information and communication technologies (ICT). The objective of the meeting was to:

1. Discuss key global trends in Open Access to scientific information and research;
2. Discuss and operationalize the UNESCO Open Access strategy, including identifying partners and extra-budgetary funding sources; and
3. Contribute project ideas and new directions for future biennia covered in the Strategy

UNESCO invited experts from all the five regions of the UNESCO Member States, and key stakeholders to participate in the meeting. The list of invited participants, representatives of the Delegates to UNESCO, and staff members participated in the meeting are in Annexure 1. In order to facilitate and encourage discussion and sharing of ideas, the 2 days forum was organized into sessions with 2-3 key presentations from the participants. The programme schedule is given in Annexure 2.

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[1] http://www.unesco.org/new/fileadmin/MULTIMEDIA/HQ/CI/CI/images/GOAP/OAF2011/213342e.pdf

[2] Open Access (OA) is the provision of free access to peer-reviewed, scholarly, research information (both scientific papers and research data) to all. It envisages that the rights-holder grants worldwide irrevocable right of access to copy, use, distribute, transmit, and make derivative works in any format for any lawful activities with proper attribution to the original author.

[3] http://unesdoc.unesco.org/images/0021/002144/214466e.pdf

A summary of the discussions in the technical sessions of the 2 days meeting is presented in the following pages.

Day One: 22 November 2011

Session 1: Welcome and introduction

Dr. Indrajit Banerjee, Director, Knowledge Societies Division welcomed all participants, and highlighted the importance of OA by stating that access to information is crucial for socio-economic development, and UNESCO is committed to increase access to information and knowledge to bridge the digital divide and reduce barriers to socio-economic development. He further said that scientific development is concentrated in the developed world, and therefore large chunk of scientific information is produced in the developed countries. However, access to peer reviewed content is extremely expensive and inaccessible, especially to researchers in the developing countries. In order to establish equitable and pluralistic knowledge societies, OA is a necessary precondition. He believed that the deliberations in the meeting will help UNESCO to further sharpen its strategic interventions in the field of Open Access. He then requested Mr. Jānis Kārkliņš, Assistant Director General, Communication and Information Sector to deliver the inaugural address.

Mr. Kārkliņš in his inaugural address[4] welcomed the experts and thanked them for accepting UNESCO's invitation. He highlighted the many challenges of universal access to information such as the multilingual nature of created knowledge, intellectual property laws, poor access to technology, spiraling cost of information, and preservation of information for cultural heritage. Open Access brings to us a variety of solutions to improve access to information and knowledge primarily due to the increasing access to the Internet, he emphasized. While re-iterating UNESCO mandate to "maintain, increase and diffuse knowledge", he also indicated to the Article 27 of the Universal Human Rights Declaration (1948) that include access to and sharing the benefits of scientific advancement as a human right. He submitted to the expert group that while the discussions should centred on the recent trends and the issues in the next two days, it would also be worthwhile to spend time on discussing partnerships and collaborations, and how to improve access to scientific information in the developing countries. He expected that the final recommendations of the expert meeting would be useful and shall be acceptable to the stakeholders.

Dr. Sanjaya Mishra, Programme Specialist (ICT in Education, Science and Culture) in charge of Open Access welcomed the participants and gave an overview of the

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[4] http://www.unesco.org/new/fileadmin/MULTIMEDIA/HQ/CI/CI/images/GOAP/OAF2011/ADG-CI%20Speech%20Open%20Access%20Forum_Final.pdf

structure and logistics of the programme, and organization of the thematic sessions. This was followed by the self-introduction by the participants, and a short coffee-break.

Session 2: Open Access to Scientific Information and Research
Facilitator: Indrajit Banerjee
Rapporteur: Devika P. Madalli

The session started with remarks of the faclitator Dr.Indrajit Banerjee, Director, Knowledge Societies Division (CI/KSD); Communication and Information Sector, about UNESCO's mandate on OA that was adopted after discussions and suggestions of Member States at 36th session of General Conference. While highlighting the importance of OA to academic and scientific communities, Dr. Banerjee called for suggestions and recommendations that would help make a roadmap of OA for UNESCO. However he emphasized that UNESCO could only function as a facilitator to OA activities. He asked Dr. Mishra to make the presentation entitled 'UNESCO Open Access strategy'[5].

Dr. Mishra drew attention to the fact that OA concept has been long discussed since Budapest declaration, but still fall short of the grand objective. Tracing the gamut to types of resources from priced to public domain, Dr. Mishra observed that in that spectrum Open Access has place in the middle. Dr. Mishra further highlighted an inclusive approach for Open Access to information with all stakeholders on a common platform. While UNESCO has been working in the field of Open Educational Resources since 2002, its work on OA is of recent origin. It intends to be a proactive partner and facilitator of the OA movement. He further said that UNESCO recognizes the 3Fs as basis for OA foundation – Flexibility, Freedom and Fairness. An important observation he shared was that OA is not contrary to Copyright, but it is empowerment of the author's right to share their works. He also traced the work of UNESCO as a participant and partner right from the Universal Declaration of Human Rights, World Summit on the Information Society (WSIS) -- Tunis and Geneva and other fora on access to information and knowledge.

Putting in perspective the Global Open Access Portal (GOAP) that was launched by UNESCO on 1 November 2011, Dr. Mishra stated that UNESCO aims to facilitate OA through a platform of access to scientific information so that initiatives can come together in a network and discuss collaboratively. He also touched upon the Open

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[5] http://www.unesco.org/new/fileadmin/MULTIMEDIA/HQ/CI/CI/images/GOAP/OAF2011/2.1_Mishra.pdf

Access toolkit that would help OA initiators reuse the tools instead of creating from scratch.

He announced the release of the forthcoming Open Access Policy Guidelines (from UNESCO) written by Dr. Alma Swan as a flagship document to promote OA in all areas. He also stated that UNESCO would have a major focus on capacity building activities aimed at policy-makers as well as OA managers.

Dr. Mishra then highlighted the indicative activities of UNESCO that include dialogue with governments and research institutions to develop relevant policy. He emphasized the need for evidence based policy research on OA and promotion of OA journals whether through funding or capacity building. Dr. Mishra stated it would be ideal to leverage on OA communities' work, collaborations and cooperation, maybe through OA week held across the world. He also stated UNESCO intends to bring out OA trend reports that would help share best practices on OA. He put forth the idea of an International Congress on OA. He described measurable outcomes of the UNESCO's intervention in the field of Open Access in the coming years, subject to availability of adequate funding to undertake all planned activities.

During the interaction and discussion several participants articulated their views and suggestions. Some of the major issues raised are as follows:

- Prioritization of issues involved in OA needed and creation of an enabling environment for OA policies should be the major priority. While the second priority should be capacity building and the third creating a clearinghouse of OA material to which UNESCO should partner with other organizations to make cooperative network of all OA initiatives.
- Fostering cooperation should be a top priority for UNESCO in the field of OA.
- Sector based capacity building in fields like agriculture, social sciences etc is also important as there could be cultural and environmental difference of particular communities that need to be taken into account while developing interventions for OA, especially in organizing conferences and congresses.
- Implementation should also get due attention and it is important to handhold the implementers with practical training. A coalition of OA players worldwide should be thought of and UNESCO has an important role in such a coalition.
- Some participants felt that a convention on OA or another declaration may not be needed at this stage of development. But it was explained that UNESCO Convention and/or declaration has different meaning to the acceptability and agreement on a topic of interest. However, the views of the experts should also be considered while organizing future events leading to any declaration.

- UNESCO should be careful not to duplicate already on-going efforts but make a distinct effort and inclusive OA programme that would have all stakeholders even from developing countries so that there is equitable access to information.
- 'Well-funded publishing lobby needs well-funded OA policy advocate', hence UNESCO has a role in both advisory and advocacy levels of governments.

Dr. Banerjee re-emphasized that UNESCO only facilitates based on the mandate of its Member States. While agreeing that prioritization is important and that suggestions are well taken and they are totally within the mandate. He stated that it is important to take note of the practical points how to do capacity building and identifying who are the major players and contributors who could be tapped. In conclusion Dr. Banerjee summarized the proceedings of the session as follows:

- Need to prioritize on policy issues
- Involve all Stakeholders - regional, local and international partnerships for different dimensions
- Localize -- take into considerations local needs – and capacity building through targeted conference/ workshops
- Provide advisory support and advocacy for government and policy-makers

Dr. Mishra concluded the session after thanking the participants.

Session 3: Open Access Repositories and Journals – I
Facilitator: Abel Packer
Rapporteur: Iryna Kuchma
The objective of the session was to focus on understanding the contemporary status of Open Access journals and how UNESCO can promote OA journals. There were three presentations:

- The Status of OA Journals[6] by Lars Bjørnshauge
- Problems and Prospects of OA Journal Publishing by Ahmed Hindawi
- Towards development of indicators for measuring the impact of OA journals and repositories by Jean Claude Guedon

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[6] http://www.unesco.org/new/fileadmin/MULTIMEDIA/HQ/CI/CI/images/GOAP/OAF2011/3.1_Lars.pdf

Before asking each of the above experts to make their presentations, the facilitator of the session, Mr. Abel Packer of SciELO started by giving the following numbers to highlight the growth of OA journals:

- about 20,000 journals are published;
- over 7,000 OA journals are listed in in DOAJ;
- about 20% of the journals listed in ISI/Scopus are from Latin America and about 60% of the journals listed are from Europe and USA;
- in 2011 there were about 1,5 million downloads of articles in SciELO[7] Brazil.

He also highlighted some issues in OA journal publishing such as sustainability, multilingualism and impact.

Lars Bjørnshauge of SPARC Europe[8] focussed on OA journals but also reminded about OA monographs – OAPEN project[9] was mentioned as one of the successful examples. His presentation was based on the figures from Directory of Open Access Journals[10] (DOAJ) that do not represent the real number of OA journals, but merely the journals discovered and processed (evaluated) by the DOAJ team. There might be about 500 – 1500 more OA journals published worldwide:

- 7300+ OA journals (scholarly, peer-reviewed, no embargo, extensive use and re-use rights);
- published in more than 115 countries;
- accepting articles in more than 55 languages;
- diversity of OA journals mirrors diversity of subscription based journals – there are high impact & low impact OA journals.
- DOAJ grew from 560 OA journals in 2003 to over 7300 OA journals in 2011.
- There is a relative increase of OA journals published in Africa (mainly due to Hindawi) and Asia, but still most journals are from Europe and North America.
- 47% of OA journals provide article level metadata to DOAJ.
- Only four publishers listed in DOAJ publish more than 100 OA journals, so this is a diverse collection.
- 71% of OA journals do not charge Article Processing Charges (APCs) and in South America 87% of OA journals do not charge APCs.

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[7] http://www.scielo.org/php/index.php

[8] http://www.sparceurope.org/

[9] http://www.oapen.org/home

[10] http://www.doaj.org/

- As to machine readable license information, 15% of OA journals use CC BY, 9% use other CC licences with reuse rights, 24% use other CC licences and 76% of OA journals do not provide any machine readable copyright information.

What could be done to improve the functional quality of OA journals? -- additional information about the journal/articles to be provided by the publishers such as

- original and translated journal title, article title and abstract;
- Article Processing Charges (APC) in relevant currency; whether the journal has article submission charges (in relevant currency) and APC waiver policy;
- number of articles published (previous year);
- acceptance rate (previous year);
- link to information about peer-review procedures and/or to information about the editorial board;
- link to copyright policy/license (machine readable);
- link to download statistics;
- RSS feeds;
- Digital Object Identifier[11] (DOI);
- provision/upload of references;
- official journal title abbreviation from ISSN[12].

Lars also emphasized the following in his presentation:

- Experiments with article level metrics: We need new metrics to challenge the regime of the Journal Impact Factor[13] (JIF) and promising experiments with article level metrics are under way, such as in the PLoS One[14].
- Aggregation & consolidation: Aggregators and platform providers like SciELO, Redalyc, BioLine International, Public Knowledge Project (Open Journals Systems) etc. are doing a fantastic job and the "lonely" journals need to find a "home". Aggregation and consolidation adds significant value to the journals in terms of technical functionality and capability, visibility and impact.

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[11] http://www.doi.org/

[12] http://www.issn.org/2-22660-LTWA.php

[13] http://thomsonreuters.com/products_services/science/free/essays/impact_factor/

[14] http://www.plosone.org/static/almInfo.action

Lars said that OA journals are here to stay, but if we want OA to prosper and grow we must support the publishers in improving the technical and functional quality of their OA journals and there is plenty of room for improvements. UNESCO should partner with organizations already working on this to build capacity.

The next presenter, Dr. Ahmed Hindawi, CEO of Hindawi Publishing[15] highlighted the following challenges and prospects of OA journals:

Challenges for the journals charging APCs:

- There was a negative correlation between the quality of the journal and the fact of charging APCs – many subscriptions based publishers trying to protect their businesses used the argument that APCs are not compatible with high quality, peer reviewing, etc. Now it looks like this phase is already over as most commercial publishers started their OA journals and/or hybrid journals and charge APCs. But there are still misperceptions among the authors.
- Where to get money to cover APCs is another issue. Those having access to money might be willing to spend in a different way than covering APCs. Currently research funders are giving good messages – e.g. Wellcome Trust is doing very well in this respect. But still many researchers believe that the more you spend on APCs the less you spend on science and often they forget that subscriptions money also come from institutions. There might be substantial savings to the system when journals are OA and money allocated for subscriptions are used to cover APCs. This issue has already been more or less overcome.
- Journal Impact Factor (JIF) is another challenge. It is good for measuring the quality of the journals but there is high inconsistency in the way ISI evaluates the journals. 23% of the journals excepted in the Web of Science in the last 12 months were OA journals, but these were the journals from 2005 publication year, so this is a figure from a number of years ago.

Dr. Hindawi stated that subscriptions journals also face a number of challenges such as shrinking library budgets and increasing amount of articles published (60,000 new articles emerge every year). He said that there are more prospects for OA journals because of the new phenomena of mega OA journals started by PLoS One – with a wide scope, rigorous research and significant contributions (almost 14,000 articles published this year and next year it might be doubled), some tried to discredit it but PLoS One received JIF above 4. This is to be celebrated by OA journals.

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[15] http://www.hindawi.com/

Prof. Jean-Claude Guedon of University of Montreal spoke about the evaluation of OA journals and widened the topic to the process of revisiting scholarly communication as such. OA movement has forced us to go back and revisit what is going on in scientific communication – why do we publish and what do we publish. Current evaluation system is crazy especially when we look at the interdisciplinary work e.g. molecular biology. When Garfield[16] came up with the idea to measure citations there was a very small number of journals published (about 2,000). He concentrated on core science only, consulted with his colleagues (using snowball approach across the limited population of scientists) and ended up with Science Citation Index. Now citation index includes over 8,000 journals but they are still incorporated in a "club like" manner in North America and in some European labs. And sometimes people just forget that at least three decimals are needed to rank the journals precisely. We do need some competition in scholarly communication but not the kind of ranking and competition that leave the rest in the dust and take a lot of time and efforts. Science is not universal (choice of problems that are part of doing science is not universal) but in the current journal evaluation system there is a tendency to universalize; and quality and relevance are often mixed up. Sometimes it's not the quality of the article that is measured, but its relevance to the journal's orientation – policies and mission – and as a result some issues are not considered interesting for the Western audience. For the last 50 years science was excellence and competition. Let's examine the excellence first. There is a large majority of researchers doing their everyday routine work and not competing with each other. Only the top level scientists compete with each other. Most of science is not generated through competition but through good quality. The Nobel prize winners compete, but most researchers don't. That's why we should talk about excellence in the context of quality. When one has a peer-review system it's not competition, its quality assurance. The students receive their grades because their professors want to check their quality. So we need to separate excellence from quality and have to start designing metrics for quality assurance. Quality should be judged by the readers – by reading, re-using, possibly citing as well, but usage statistic is difficult to get from the publishers. OA is the way to re-establish the quest for quality in science and to locate the right place for the top level excellence competition that is healthy science.

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[16] Eugene Garfield, the founder of Institute for Scientific Information (now part of Thomson Reuters) used statistics to measure the impact of research, see http://en.wikipedia.org/wiki/Eugene_Garfield

The session generated lot of discussion and comments, some of which are summarized below:

- We have to fight the epidemic of ranking, and find better ways to represent usage and quality.
- Only about six countries in Africa do not produce any research results but the continent is hardly visible on "international" scientific arena. And speaking about mega journals – they bring the quality over excellence.
- Bad quality articles are usually not published, the quality is improved when the feedback from the reviewers is provided. Journals give the quality seal and this has been now moved to the post-publication stage.
- It is surprising that among OA journals rights are still not defined: 76% of OA journals don't apply CC licences but apply copyright.
- We have to work with "lonely" OA journal publishers (publishing only one journal) to reduce the number of "lonely" journals.
- The question still remains -- how do we collect the article level metrics, how do we access journals, how do we identify the quality and how do we measure impact.
- For PLoS the beginning stages of article level metrics worked well. The platform is being changed now (with a grant from a Sloan foundation) and a community feedback is welcomed and needed.
- Impact is much more than just citations; science and scholarship are tied to communities. Scientists live in the society and they have to transmit their knowledge to new generations. Public should be able to make informed decisions and they have to have access to the latest research information. Patients will do their best to understand what is happening with their health. Decision makers should also be able to have access to research information. So, a comprehensive look at impact is needed.
- While measuring the impact, we will have to take into consideration much more long-term impact – e.g. 25-year impact, much longer term view.
- There are also language issues – health information is usually not in the language that the patients can understand.
- A contrary view is that article level metrics don't serve all the purposes – people want to read the most recent articles, prefer certain journals, etc. Author level metrics look much better – e.g. citations and H-index[17]. We need to engage into unique author identifier projects to improve the author based metrics.

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[17] http://en.wikipedia.org/wiki/H-index

Mr. Abel Parker, facilitator of the session summarized the following points at the end of the session:

- The problem of JIF is not calculation, but coverage.
- There is a quality problem in some areas of OA publishing and we need more capacity building to improve quality.
- When developing countries are not included in citation indexes - how would they know that they publish quality journals? Some sort of quality measure is needed, in deed.
- "Lonely publishing" is also a problem, and aggregate publishing to bring down cost in an innovative manner is needed.
- Should we have international APCs or should we negotiate APCs on regional basis?
- Impact measurement is highly complex, and work on this area should be carefully designed.
- Editorial boards need to be more international to create international image of the journals.
- Publishing is integral part of doing research – we should include this into national science policies
- UNESCO needs to work with the Open Access Scholarly Publishers Association[18] (OASPA).

Session 4: Open Access Repositories and Journals – II
Facilitator: Xiaolin Zhang
Rapporteur: Martin Belcher

The objective of the session was to focus on understanding the contemporary status of Open Access repositories and steps needed to promote OA repositories, including the efforts in the Europe as example. There were three presentations:

- Status and Importance of OA Repositories by Steven Harnad (via video and Skype)
- European Commission and e-Infrastructure for Open Access by Carlos Morais Pires
- European Experience of Open Access Repositories by Norbert Lossau

The session started with a Skype and a video presentation[19] by Steven Harnad from University of Montreal. In his presentation on "What UNESCO can do for Open

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[18] http://www.oaspa.org/

Access: Don't reinvent the wheel, help it roll worldwide", Dr. Harnad categorically emphasized that UNESCO should:

- Promote and where needed, help fund green OA repositories.
- Promote the adoption of green OA self-archiving mandates by institutions and funders.
- Do not over reach in other areas until this is done. Over reaching is a key danger.
- Do not support Gold OA journal set up and APCs.
- Do not create central repositories

He explained that green route over gold is important – because it comes from the research community directly and not the publisher community. Continuing this, he said, deposit institutionally, harvest centrally should be the motto.

Mr. Carlos Morais Pires[20] from the European Commission presented a summary of e-infrastructure for supporting OA at EU level. Some of the highlights are:

- All EU strategies feeding into high level vision that includes a package of policies, programmes and activities. OA plays an important role in these at all levels by strengthening the research infrastructure of Europe.
- European data infrastructure: NRENs and open standards and communication linking states and through to other regions and countries of the world.
- Forthcoming communication on open data strategy is to be published in next few days. This will be for EU parliament and member states communicating Open Data.

Mr. Carlos also stated that EU aims to provide real support for participatory, viable and cost effective infrastructures that support OA.

Dr. Norbert Lossau[21] from the Niedersaechsische Staats und Universitaetsbibiliothek, Germany presented the European experiences of Open Access repositories. While sharing the experiences of the two large Communities of Practice (CoP) in Europe –

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[19] http://vimeo.com/32422211

[20] http://www.unesco.org/new/fileadmin/MULTIMEDIA/HQ/CI/CI/images/GOAP/OAF2011/4.2_Carlos.pdf

[21] http://www.unesco.org/new/fileadmin/MULTIMEDIA/HQ/CI/CI/images/GOAP/OAF2011/4.3_Norbert.pdf

Confederation of Open Access Repositories[22] (COAR) and Open Access Infrastructure for Research in Europe[23] (OpenAIRE), Dr. Lossau said:

- OpenAIRE funded by EU provides support to the EU OA policy
- Also makes EC/ERC OA policies known to researchers and policy coordinators and support their use of OA/compliance with policies through the National OA Desks (NOADs). Provides repository infrastructure based on standards– linked through to OpenDOAR[24]. As a last resort also provide a repository for items.
- COAR is a broad community beyond European Union, and is based on membership support to facilitate global knowledge infrastructure.
- It is trying to make community effort sustainable beyond individual projects via three working groups. 1. Repository content – getting content into repositories. 2. Interoperability – why it's important and how best to do this. 3. Training – support and training to build capacity in building and managing repositories.

Dr. Lossau also informed about the new Open Access infrastructure to the European research scientific production: OpenAIRE+

The session was highly interactive and some of the important points that were identified are as follows:

- The problem is not repositories, permissions or networks; rather the absence of mandates is the critical issue and should be addressed adequately. The repositories are largely empty, and thus mandates are necessary.
- Open Access mandates are useful but they must be well designed, supported and resourced.
- UNESCO should prepare an internal OA policy to shift all UNESCO publications to OA.
- Any mandates or best practice from UNESCO on mandates must be clear and realistic, ready for re-use, multi-lingual and with supporting case studies.

At the end of the session, Dr. Xiaolin Zhang, Executive Director of National Science Library of Chinese Academy of Sciences thanked all the presenters, and emphasized

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[22] http://www.coar-repositories.org/

[23] http://www.openaire.eu/

[24] http://www.opendoar.org/

providing access to scientific information is a complex task, and all solutions should be welcomed, and especially mandates should be prepared well, enforced, and implemented and scholars should be encouraged to deposit.

Day Two: 23 November 2011

Session 5: Open Access Policies
Facilitator: Vincent Wintermans
Rapporteur: Shalini Urs

The objective of the session was to focus on Open Access policies, examples and how UNESCO may like to promote OA in Member States. There were three presentations:

- Promoting OA Policies and UNESCO OA Policy Guidelines by Alma Swan
- European Commission and OA Policy recommendations by Jean-Francois Dechamp
- Open Access Policy and Wellcome Trust by Robert Kiley

Vincent Wintermans of the Netherlands National Commission for UNESCO, in his initial remarks stated that policy has already been brought out as a major issue before us in the last session yesterday. And the three presentations including the first one by Dr. Alma Swan will help UNESCO to take right action in this important matter.

Dr. Alma Swan[25], Director of Key Perspective humbly presented her experiences of OA policy development including the OA Policy Guidelines that she has prepared for UNESCO. Some of the important highlights of her presentation are:

- While about 20% research literature is now available in Open Access, but some critical areas of science have very low percentage of OA literature
- Mandates, especially institutional mandates are increasing. While mandates as a term is used differently, what is important is mandatory policy
- UNESCO has a distinct advantage of influencing Member State research institutions because of its overarching goals to provide access to information and knowledge
- UNESCO should help build the evidence-base for Open Access by advocacy amongst the widest range of community of researchers
- Localism should trump globalism for UNESCO, and therefore taking local action based on stakeholders' need at diverse fields and region is important

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[25] http://www.unesco.org/new/fileadmin/MULTIMEDIA/HQ/CI/CI/images/GOAP/OAF2011/5.1_%20Swan.pdf

- UNESCO should have its own OA policy with appropriate licensing for all its publications
- 40% users in the PubMed Central are ordinary citizens, and this is an evidence base for the support of OA

Dr. Swan also presented a typology of the OA policy that is part of the forthcoming UNESCO OA Policy Guideline document. She also emphasized that UNESCO should focus on policy development, advocacy, capacity building and building partnerships that are all part of the strategy paper.

Mr. Jean-Francois Dechamp[26] of the European Commission (EC) presented the activities of EC on promoting OA policy in the Europe, especially by highlighting the work under the Framework Programme 7 (FP7), and OA pilot with 6/12 months mandate for self-archiving. He also talked about the support to OpenAIRE and DARIAH project. The EC has taken the following steps to promote Open Access:

- Communication on Scientific information in the digital age (2007)
- Council Conclusions on Scientific information in the digital age (2007)
- 2009 & 2011 Questionnaires to Member States
- 2011 Survey on OA in FP7
- Public consultation on scientific information in the digital age

Mr. Dechamp also informed that 2012 Communication & Recommendation on scientific information is in preparation.

Mr. Robert Kiley[27], Head of Digital Services at Wellcome Library presented the work of Wellcome Trust on promoting funder policy for Open Access. He said 'access denied' for Wellcome Trust funded research was a triggered event for OA policy at Wellcome Trust that intends to maximize the return on investment and to better understand the Trust's portfolio of research funding. The Wellcome Trusts' OA Policy[28] states that all research papers – funded in whole or in part by the Wellcome Trust – must be made freely accessible at the PubMed Central and UKPMC repositories as soon as possible and in any event within six months of the journal

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[26] http://www.unesco.org/new/fileadmin/MULTIMEDIA/HQ/CI/CI/images/GOAP/OAF2011/5.2_Dechamp.pdf

[27] http://www.unesco.org/new/fileadmin/MULTIMEDIA/HQ/CI/CI/images/GOAP/OAF2011/5.3_Kiley.pdf

[28] http://www.wellcome.ac.uk/About-us/Policy/Policy-and-position-statements/WTD002766.htm

publisher's official date of final publication. Some of the activities of Wellcome Trust in the field of Open Access highlighted in the presentation are:

- providing dedicated funding to institutions to meet OA costs
- building the UK PubMed Central resource
- working with publishers to ensure their processes enable and support compliance
- raising awareness of the benefits of OA in the research community
- announcing a new top-tier, open access ejournal (eLife) with the Howard Hughes Medical Institute and the Max Planck Society

Mr. Kiley informed that the current rate of compliance for deposit in UK PubMed is over 50%, and even if the APC is about £2000, UK will save money, according to a report, he said. Another interesting fact is that it will cost Wellcome Trust 1.25% of its total research fund, if all the research out puts funded by it is published in OA journals with APC.

The session was highly interactive and generated many questions and debate. Some of the important ideas expressed are as follows:

- UNESCO should look at societal benefits of Open Access through research
- How Open Access contributes to economic growth is important to show through research. A recent study in Denmark[29] reveals that access to research information brings substantial benefits to the industry.
- Another important point is to focus on the Openness, as the recent study[30] comparing the Public Human Genome project and gene coded by another proprietary firm reveal that intellectual property (IP) on an existing technology affects subsequent research and development (R&D)
- There is a need for people in the top to champion Open Access by showing the evidence-base
- UNESCO should develop a soft policy for adoption by Member States institution, and it is important not to be hard on researchers/scientists
- Policy needs to be supported in the institution to fill the repositories, including promoting the value of career advantage for researchers due to Open Access to their research work

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[29] http://www.fi.dk/publikationer/2011/adgang-til-forskningsresultater-og-teknisk-information-i-danmark/adgang-til-forskningsresultater-og-teknisk-information-i-danmark-access-to-research-and-technical-information-in-denmark.pdf

[30] http://www.nber.org/~heidiw/papers/5_12_10a_hlw.pdf

- Funding agencies can make a rule to ask the researchers to point to the open repositories where everyone can read the paper.
- Effect of the type of OA policy in deposit rate needs to be studied so that we can see what works and what not
- Measuring of Open Access and its impact is an area that UNESCO should work further

Mr Wintermans at the end of the session summarized the following:

- UNESCO must work to develop evidence-base of Open Access
- It should share best practices and stories (best practices as well as failures)
- Develop consensus, and bring all stakeholders together
- Implementation of policy is important, and the Guidelines to be published should be actively pursued with member States

Session 6: Network for Open Access to Scientific Information and Research (NOASIR)

Facilitator: Sanjaya Mishra

Rapporteur: Mandy A. Taha

The objective of the session was to focus on the idea of NOASIR to improve collaboration and access to scientific information for the less developed countries, besides encouraging publishers to use Open Access business models. There were three presentations:
- Increasing Access to Scientific Research: An overview of some current STM collaborative research and delivery programmes by Richard Gedye
- FAO and Open Access by Stephen Rudgard
- WHO and Equitable Access by Kimberley Parker

Dr. Sanjaya Mishra facilitator of the session started by emphasizing that UNESCO will seek the best possible way to encourage scientists and researchers to publish in OA journals and repositories. It will support all OA technologies and it will serve as a catalyst for OA in further cooperation with other organizations. In addition, UNESCO intends to provide more access to scientific information to developing countries. The idea of a network is not to create another physical organization, but to create a platform of OA organizations to share their work and develop synergy for the OA movement.

Mr. Richard Gedye[31], Director, Publishing Outreach of the International Association of STM Publishers presented an overview of some current STM collaborative research and delivery programmes. The highlights of his presentation are as follows:

- A study reported[32] in October 2010 informed that access to research article is fairly good at 93%
- There are other ways of providing research such as the Research4Life to which many STM publishers are contributing
- Over 9000 journals are available through the R4L model
- Information access philanthropy is another model of providing access, and patientINFORM[33] with over 1000 journals is an example

Mr. Geyde also informed about the PEER Project[34] that is investigating the effect of systematic self-archiving and covers over 140 journals. He emphasized that STM publishers are committed to the wide dissemination of, and unrestricted access to, their content in a sustainable manner that ensures the integrity and permanence of the scholarly record and do not – constrain scholarly authors or affect the sustainability of the publishing enterprise.

Mr. Stephen Rudgard[35], Chief Knowledge and Capacity Development of Food and Agriculture Organization (FAO) presented FAO's efforts to improve collaboration and access to agriculture information. In his presentation Mr. Rudgard presented the following activities of FAO:

- CIARD[36] (Coherence in Information for Agricultural Research for Development) – An initiative working to make agricultural research information publicly available and accessible to all.
- AGRIS[37] (International Information System for the Agricultural Sciences and Technology) - A global public domain cooperative database with 2661719 structured bibliographical records on agricultural science and technology.

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[31] http://www.unesco.org/new/fileadmin/MULTIMEDIA/HQ/CI/CI/images/GOAP/OAF2011/6.1_Gedye.pdf

[32] http://www.publishingresearch.net/documents/PRCAccessvsImportanceGlobalNov2010_000.pdf

[33] http://www.patientinform.org/

[34] http://www.peerproject.eu/

[35] http://www.unesco.org/new/fileadmin/MULTIMEDIA/HQ/CI/CI/images/GOAP/OAF2011/6.2_Rudgard.pdf

[36] http://www.ciard.net/

[37] http://agris.fao.org/

- AIMS[38] (Agricultural Information Management Standards) - A web portal that underpins CIARD and managed by the Food and Agriculture Organization of the United Nations (FAO). It disseminates standards and good practices in information management for the support of the right to food, sustainable agriculture and rural development.
- IMARK[39] (The Information Management Resource Kit) - An- e-learning initiative with over 100,000 learners in 5 languages aiming to developing countries people/learners.
- AGORA[40] is part of the Research4Life

Ms. Kimberley Parker[41] of World Health Organization (WHO) presented the work of WHO towards equitable access. Emphasizing WHO commitment to extend to all peoples of the benefits of medical, psychological and related knowledge for fullest attainment of health, she said that one of the WHO's functions is "to provide information, counsel and assistance in the field of health." While WHO retain copyright for all its publications, it is working along with other UN Agencies towards a suitable license applicable for intergovernmental organizations to share these materials more freely. She emphasized that "permissions for re-use need to be specially crafted to avoid use for the promotion of products, services or philosophies, or any use that might suggest endorsement". She also shared the following information:

- There is an institutional repository in WHO
- The HINARI[42] project is part of the Research4Life, and it has more than 8000 journals and 5000 books. She noted that these are not Open Access, but another way to provide equitable access to the developing world.

The session was highly interactive and the following major issues were identified:

- There should be local capacity for policy making and Open Access in developing countries

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[38] http://aims.fao.org/

[39] http://www.imarkgroup.org/

[40] http://www.aginternetwork.org/en/

[41] http://www.unesco.org/new/fileadmin/MULTIMEDIA/HQ/CI/CI/images/GOAP/OAF2011/6.3_Kimberly.pdf

[42] http://www.who.int/hinari/en/

- Ensure partnership with local and regional initiatives for improving Open Access.
- UNESCO needs to clearly differentiate between Open Access and non-Open Access initiatives such as the Research4Life
- Institutional repositories enhance discoverability of the research work
- All the information that we are concerned is part of our digital heritage, and the 2003 Charter[43] on Digital Heritage is also related to the Open Access movement
- Use other mailing lists and sources of dissemination for providing more access to UNESCO related information beyond the WSIS community
- The World Bank model of sharing information is another way to look at.
- Google Scholar Citation[44] has more coverage, and the citation tracking is very useful for discoverability of articles.

At the end of the session Dr. Mishra emphasized that the objective of UNESCO is to bring more publishers to our platform and engage them through a network and influence them to use new business models of Open Access. Also it may be noted that use of CC license and availability of information in true OA manner is in progress, and therefore, we should try to be more inclusive in our approach to provide better access to scientific information to the developing countries.

Session 7: Education and Training for Open Access
Facilitator: Eve Gray
Rapporteur: Bojan Macan
The objective of the session was to focus on improving the standard of Open Access education and training for library and information professionals by stock-taking the current scenario and looking into the possibility of developing a standard curriculum. The session had two presentations:

- Towards a curriculum for Open Access by Shalini Urs
- Open Access Training: EIFL experiences by Iryna Kuchma

At the opening of the session, the facilitator Ms. Eve Gray of the University of Cape Town talked about the importance of the session in the light of capacity building and introduced the speakers.

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[43] http://portal.unesco.org/en/ev.php-URL_ID=17721&URL_DO=DO_TOPIC&URL_SECTION=201.html

[44]

https://accounts.google.com/ServiceLogin?service=citations&continue=http://scholar.google.com/citations%3Fuser%3DJLdmSPoAAAAJ%26hl%3Den&hl=en

Prof. Shalini Urs[45] of the University of Mysore, India in her presentation gave an overview of Open Access (OA) movement – in first 20 years OA holds approximately 20% of market share. She said, in the next phase activities should be focused on education and training in OA because people are the key ingredients for the sustainability of OA movement. There are two main stakeholder groups in OA – scholars and LIS professionals and there's a need for formal educational programmes for their education and training. The UNESCO desktop study[46] on Open Access training opportunities revealed that there are not many formal courses available to provide pre-service training on Open Access. But there are also more courses which are not dealing only with OA, but which have a significant OA content. This study has also identified a number of OA topics, among which are: scholarly publishing, Open Access (definitions, OA archives, OA publishing, OA policies), Open journal systems, D-Space, preservation, OA publishing, OA archiving etc. On the basis of the results of this study, the model for OA course for LIS professionals was made. This course is, among other, intended to examine the participation and engagement of LIS professionals in the scholarly information life cycle both from the creator/author as well as consumer/user end. After finishing this course student should gain philosophical foundations of scholarly communications, knowledge about the phases of journal publishing, OA, building digital libraries, bibliometrics etc. Prof. Urs also briefly presented the content of this course, which consists of 10 units.

Ms Iryna Kuchma[47] of Electronic Information for Libraries[48] (EIFL) presented the experiences of EIFL on Open Access training. EIFL is an international non-profit organization which is enabling access to knowledge in developing and transition countries in Africa, Asia and Europe. EIFL has currently members from more than 45 countries. EIFL has so far helped in establishing more than 41 OA repositories and 2.600 OA journals in EIFL partner countries, adopting 24 OA policies, organizing more than 60 awareness raising, advocacy and capacity building events and workshops in 2003-2011 in more than 35 countries with participants from more than 50 countries. EIFL has also organized OA workshops and trainings in many

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[45] http://www.unesco.org/new/fileadmin/MULTIMEDIA/HQ/CI/CI/images/GOAP/OAF2011/7.1_Urs.pdf

[46] http://www.unesco.org/new/fileadmin/MULTIMEDIA/HQ/CI/pdf/UNESCO-OA-ET-Report-WithAppendix-final-Urs.pdf

[47] http://www.unesco.org/new/fileadmin/MULTIMEDIA/HQ/CI/CI/images/GOAP/OAF2011/7.2_Kuchma.pdf

[48] http://www.eifl.net/

countries. Because of financial issues, those trainings are usually regional ones. Recently, EIFL has also started with organizing of online trainings and so far these experiences had been great. EIFL has also started e-learning course using Moodle for Open Access training in Poland[49].

Some of the major issues raised during the discussion are:

- It is the most important to educate researchers and therefore the OA course should be held at the university to the future consumers of scientific information. However training is needed for all the stakeholders -- librarians, researchers, publishers, etc.
- There isn't enough opportunity for pre-service training about OA, and therefore, it is important to develop a model curriculum which would be useful for different groups of stakeholders: researchers, policy makers and librarians.
- The digital cultural change is a major force, and library science should as such change to adapt to the new scenario. Libraries are now days becoming publishers.
- The curriculum should undergo peer review.
- All available OA courses should be gathered at one place so everybody can use them.

While it is important to train library professionals and researchers about Open Access, preparing a course on Open Access is a time consuming task, and by the time it will be developed there would be many changes. So, while a curriculum be developed, developing a course on Open Access should consider ways and means as to how quickly and openly the course can be developed without compromising quality. Ms. Eve Gray emphasized that online self-learning as in the Peer2peer University[50] may be an approach to look at, but creating better training opportunities and courses should be on the agenda of UNESCO.

Session 8: Concluding Session

The final concluding session was chaired by Dr. Indrajit Banerjee, Director, Knowledge Societies Division and Dr. Sanjaya Mishra presented a short report of the proceedings. While the constructive ideas and the suggestions in all the sessions are reported above in each of these sessions, some of the important aspects that need to be kept in mind while operationalizing the UNESCO Open Access strategy are:

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[49] http://otwartanauka.cel.agh.edu.pl/login/

[50] http://p2pu.org/en/

- Capacity building of Open Access journal is important and there is a need to help support development of aggregated platforms and also improve availability of more information about OA journals, including maintaining quality of scholarly communication
- Development of indicators for assessment of impact of Open Access in general, and citation impact of OA journals, considering already existing practices such as PLoS One article level metrics
- Encourage green OA mandates and institutional repositories, and avoiding creation of central repositories
- Support and assist development of relevant policies for OA in Member States as a priority approved by the General Conference
- While the Global Open Access Portal (GOAP) be a clearinghouse for OA related information, it should also help monitoring the progress of OA policies in Member States
- Not to create another physical organization for OA, but to help develop a network of OA practitioners and organizations to synergize the activities various organizations
- Separate increasing access from Open Access, while contributing to increase access through possible partnership with Research4Life for developing countries
- Develop a modular curriculum for Open Access for pre-service and in-service training for different stakeholders (research students, librarians, scientists/editors, policy-makers) and explore the possibility of developing a self-directed learning course on Open Access
- Develop partnership and collaboration with other agencies working in the field of Open Access to augment the work already being done by them and increase UNESCO's activities on OA in diverse regions
- Engage in regional consultation, workshops and conferences to promote awareness, and advocate OA to stakeholders

Dr. Banerjee thanked all the participants for sharing their time, and said that it should be the beginning of the long partnership between UNESCO and the participating organizations. He requested all the participants to keep the communication channel open and interact through the WSIS Knowledge Communities and the GOAP. He also specially thanked Dr. Alma Swan for preparing the Policy Guidelines document that will be published in 2012, and also thanked all the contributors of the GOAP.

A visit to UNESCO Open Expo was organized at the end for the participants.

Open Access Experts Meeting
22-23 November 2011
UNESCO Headquarters (Room XVI)
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Mr Alvaro Jara
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Mrs Juliana Angulo
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Ms Justyna Sozanska, Specialist
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Mr Ousmane Blondin Diop
Deputy Permanent Delegate of **Senegal** to UNESCO
Mr Moctar Sonko, First Secretary

Ms Angelica Mulokozi Christin
Permanent Delegation of the United Republic of **Tanzania** to UNESCO

III - UNESCO Participants

Jānis Kārkliņš, ADG/CI

Indrajit Banerjee, DIR/CI/KSD

Ian Denison, ERI/DPI/PBM

Abel Caine, CI/KSD/ICT

Davide Storti, CI/KSD/ICT

Zeynep Varoglu, CI/KSD/ICT

Mika Yamanaka, CI/KSD/UAP

Sanjaya Mishra, CI/KSD/ICT

PROGRAMME SCHEDULE

Day One: 22 November 2011

10.00	**1. Welcome and Background** • Welcome Address by Indrajit Banerjee, Director, Knowledge Societies Division • Inauguration of the OA Forum by Janis Karklins, ADG for Communication and Information • Self-introductions by participants • Structure of the meeting by Sanjaya Mishra	
10.45	Break	
11. 15	**2. Open Access to scientific information and research** • Orientation and the UNESCO OA Strategy and rationale by *Sanjaya Mishra* **Objective**: To present the UNESCO OA strategy, and identify concrete action plan, potential partners and events for interventions.	Facilitator: Indrajit Banerjee Rapporteur: Devika P. Madalli
12.30	Lunch	
14.00	**3. Open Access Repositories and Journals – I** **Objective**: This session will focus on understanding the contemporary status of Open Access journals and how UNESCO can promote OA journals. • Scholarly Communication and Status of OA Journals by *Lars Bjørnshauge* • Problems and Prospects of OA Journal Publishing by *Ahmed Hindawi* • Towards development of indicators for measuring the impact of OA journals and repositories by *Jean Claude Guedon*	Facilitator: Abel Packer Rapporteur: Iryna Kuchma
15.30	Break	
16.00	**4. Open Access Repositories and Journals – II** **Objective**: This session will focus on understanding the contemporary status of Open Access repositories and steps needed to promote OA repositories, including the efforts in the Europe as example. • Status and Importance of OA Repositories by *Steven Harnad* (via video and Skype) • European Commission and e-Infrastructure for Open Access by *Carlos Morais Pires* • European Experience of Open Access Repositories by *Norbert Lossau*	Facilitator: Xiaolin Zhang Rapporteur: Martin Belcher
17.00	Closing	

Day Two: 23 November 2011

9.30	**5. Open Access Policies** **Objective**: This session will focus on Open Access policies, examples and how UNESCO may like to promote OA in Member States. • Promoting OA Policies and UNESCO OA Policy Guidelines by *Alma Swan* • European Commission and OA Policy recommendations by *Jean-Francois Dechamp* • Open Access Policy and Wellcome Trust by *Robert Kiley*	Facilitator: Vincent Wintermans Rapporteur: Shalini Urs
10.30	Break	
11.00	**6. Network for Open Access to Scientific Information and Research (NOASIR)** Objective: This session will focus on the idea of NOASIR to improve collaboration and access to scientific information for the less developed countries, besides encouraging publishers to use Open Access business models. • Increasing Access to Scientific Research: An overview of some current STM collaborative research and delivery programmes by *Richard Gedye* • FAO and Open Access by *Stephen Rudgard* • WHO and Equitable Access by *Kimberley Parker*	Facilitator: Sanjaya Mishra Rapporteur: Mandy A. Taha
12.30	Lunch	
14.00	**7. Education and Training for Open Access** Objective: This session will focus on improving the standard of Open Access education and training for library and information professionals by stock-taking the current scenario and looking into the possibility of developing a standard curriculum. • Towards a curriculum for Open Access by *Shalini Urs* • Open Access Training: EIFL experiences *by Iryna Kuchma*	Facilitator: Eve Gray Rapporteur: Bojan Macan
15.00	**8. Wrap up, conclusions, next steps**	
16.00	Closing Visit to UNESCO Open Expo at Fontenoy Building	