D1.1 - Progress Report

Activity Report from M1 to M12

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</tr>
</tbody>
</table>
CONTENTS

Document Description ....................................................................................................................... 2

1.1 Publishable summary .................................................................................................................. 5

Summary description of project context and objectives ................................................................. 5

Description of work performed and main results .......................................................................... 5

Expected final results and potential impacts .................................................................................. 6

2.1 report for the period: objectives, work progress and achievements, project management .......... 6

2.1.1 Project objectives for the period ........................................................................................... 6

2.2.1 Work progress and achievements during the period ............................................................ 8

WP2 - Content ................................................................................................................................ 8

Task 2.1 Content Map .................................................................................................................... 8

Task 2.2 Validation by Graduate Schools ........................................................................................ 9

Task 2.3 Institutional support, “train the trainer” content ............................................................. 10

Task 2.4 Content for Project Managers ....................................................................................... 12

Task 2.5 Funding Bodies .................................................................................................................. 13

WP3 – Content Delivery .................................................................................................................. 14

Task 3.1 Requirements Analysis and System Architecture ............................................................ 15

Task 3.2 The FOSTER Training Portal ......................................................................................... 15

Task 3.4 - Content upload, delivery process and training portal testing ......................................... 18

WP4 – Training ............................................................................................................................... 19

Task 4.1 – Training schedule for all stakeholders and training programmes in ERA community support .......... 19

FOSTER call for Open Science Training 2014 ............................................................................... 19

FOSTER call for Open Science Training 2015 ............................................................................ 20

Other training events .................................................................................................................... 21

E-learning courses ....................................................................................................................... 22

Task 4.2 – Training sessions for academic staff (researchers) and students .................................... 23

Task 4.3 – Training sessions for institutions (administrators, librarians) ....................................... 24

Task 4.4 – Training sessions for research project managers .......................................................... 26
Task 4.5 – Training sessions for policy makers and staff working in funding bodies ........................................... 27

Task 4.6 – Helpdesk & community support ........................................................................................................... 29

WP5 – Dissemination and Networking .................................................................................................................. 31

Task 5.1 – Dissemination ........................................................................................................................................ 31

Task 5.2 - Community Alignment ......................................................................................................................... 34

Task 5.3 – Training Evaluation ............................................................................................................................ 35

2.3.1 Project management during the period ......................................................................................................... 43

WP1 - Management .............................................................................................................................................. 43

T1.4 Project Meetings ........................................................................................................................................... 44

2.4. Deliverables and milestones tables .............................................................................................................. 46

3 - First Advisory Board Review ......................................................................................................................... 49

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1.1 PUBLISHABLE SUMMARY

SUMMARY DESCRIPTION OF PROJECT CONTEXT AND OBJECTIVES

FOSTER is a coordination initiative that aims to support different stakeholders, especially young researchers, in adopting open access in the context of the European Research Area (ERA) and in complying with the open access policies and rules of participation set out for Horizon 2020 (H2020).

It will focus on integrating open access principles and practice in the current research workflow by targeting the young researcher training environment. In addition, FOSTER will strengthen the institutional training capacity to maintain compliance with the open access policies in the ERA and H2020, and will facilitate the adoption, reinforcement and implementation of open access policies from other European funders, in line with the European Commission’s recommendation.

FOSTER aims to establish a European-wide training programme on open access and open data, consolidating training activities at downstream level and reaching diverse disciplinary communities and countries in the ERA. Each type of stakeholder will be provided with a range of relevant training programmes, practical advice, support and help. The training programme will include different approaches and delivery options: eLearning, blended learning, self-learning, dissemination of training materials/contents, helpdesk, face-to-face training, especial training-the-trainers, seminars, etc.

DESCRIPTION OF WORK PERFORMED AND MAIN RESULTS

During the first 12 months, the FOSTER consortium work was focused on the 3 main activities initially planned (identifying/mapping already existing content to be reused in training, development of the FOSTER Portal, and face to face training) to pursue the project objectives, as well on disseminating the project activity and materials to relevant stakeholders.

Regarding the content, the Content Map task (Task 2.1) was completed, through the work of the consortium on identifying and contributing content, the definition of a content protocol for the description of training materials and a Call for Content to the community. Resulting from those activities 164 content items (ranging from individual presentations, to complete training courses) were submitted and deposited on the FOSTER Portal. An Open Science Taxonomy was also developed to allow the classification and organization of content on the FOSTER Portal.

The development of the FOSTER portal was initiated by the requirements analysis and system architecture definition, completed as planned (M3). The development and deployment of the Portal was done ahead of the initial schedule. The development of the first Release Candidate (RC1), was completed in July 2014 and deployed in production (in an integrated way with the FOSTER Website) by early September. The development and deployment of FOSTER Portal Release Candidate 2 (RC2) was done on time, by the end of January 2015.

The training programme has concentrated a significant part of the project consortium effort and resources, and has already produced very relevant results on the first year. The project has issued two Calls for community courses co-funded by FOSTER, both receiving high response level (45 proposals on the first call and 80 on the second).

Resulting from the first call for training, in 2014 FOSTER co-funded 17 training programmes on open access, open data and open science (over 70 events) in 13 countries (Belgium, Bulgaria, Croatia, Denmark, France, Germany, Greece, the Netherlands, Poland, Portugal, Slovenia, Spain and the UK) in diverse
formats attended by over 1700 researchers, students, project managers, research administrators, librarians and policy makers.

As for the dissemination activities, during 2014 the project website was developed and updated, the dissemination strategy was defined, several dissemination materials (posters, MOO Cards, etc.) produced, and the project was presented in more than 30 events throughout Europe.

EXPECTED FINAL RESULTS AND POTENTIAL IMPACTS

FOSTER aims to give a significant contribution to the adoption of open access by the participants of the European Research Area (ERA), and on the compliance with the open access policies and rules of participation set out for Horizon 2020 (H2020).

The project targets primarily the creators and users of research data and research publications, i.e. the researchers, particularly young researchers and graduate students, that not only will be active researchers during the timeframe of H2020 (2014-2020), but can also act as multipliers disseminating knowledge and inducing behavioral changes on senior researchers and other stakeholders. But FOSTER is also directly engaging with other relevant stakeholders in the ERA: research institutions (administrators, librarians), project managers, policy-makers and staff working in funding bodies.

Apart from the general and comprehensive training programme, considering the different training approaches, and with around 100 face-to-face training events (far more than the 20 initially committed) and at least five self-learning courses, at least five moderated eLearning courses, FOSTER will contribute and have impact on open access and open science adoption through the FOSTER Portal that will host several hundreds of training items and can be used to support training activities beyond project duration.

FOSTER will actively seek and explore the synergies, partnerships and collaborations with other initiatives, projects or organizations that can guarantee the sustainability of the training content and the FOSTER portal beyond the project timespan. Apart from initiatives and platforms providing Massive Open Online Courses (MOOCs), FOSTER is already exploring present and future collaborations with OpenAIRE and the PASTEUR4OA Knowledge Net, to sustain, reuse and enhance the results achieved in FOSTER.

2.1 REPORT FOR THE PERIOD: OBJECTIVES, WORK PROGRESS AND ACHIEVEMENTS, PROJECT MANAGEMENT

2.1.1 PROJECT OBJECTIVES FOR THE PERIOD

The general objectives of FOSTER project are to:

- Support different stakeholders, especially young researchers, in adopting open access in the context of the European Research Area (ERA) and in complying with the open access policies and rules of participation set out for Horizon 2020;
- **Integrate open access principles and practice in the current research workflow** by targeting the young researcher training environment;

- **Strengthen the institutional training capacity** to foster compliance with the open access policies of the ERA and Horizon 2020 (beyond the FOSTER project);

- **Facilitate the adoption, reinforcement and implementation of open access policies** from other European funders, in line with the EC’s recommendation, in partnership with PASTEUR4OA project.

And these objectives are been pursued through the combination of 3 main activities;

– Identification of already existing **contents** that can be reused in the context of the training activities and repackaging, reformatting them to be used within FOSTER, and develop/create/ enhance contents if/where they are needed;

– Creation of the **FOSTER Portal** to support e-Learning, blended learning, self-learning, dissemination of training materials/contents and Helpdesk;

– Delivery of **face-to-face training**, especially **training trainers/multipliers** that can carry on further training and dissemination activities, within their institutions, countries or disciplinary communities.

For this reporting period (Months 1 to 12), the focus of the project activity was to provide the infrastructure (Website, Content Portal and eLearning platform) with the mapping of existing content organized and some training activities that will feed the Content Portal. The second period (Months 13 to 24) will focus on the use and reuse of the infrastructure, the existing contents, the development of eLearning activities and the definition of the project sustainability.

The main deliverables of the project during this reporting period were:

- D2.1 - Technical protocol for rich meta-data categorization and content classification
- D2.3 - Content and Learning objectives for target groups
- D3.2 – The FOSTER Portal
- D4.1 – Detailed Training Schedule
- D4.2 - Toolkit for training sessions w/ recommendations on most efficient use of training kits per stakeholders (academic staff (researchers & students), institutions (administrators, librarians, managers/developers of open systems/services), research project managers, policy-makers & staff working in funding bodies)
- D5.1 - Project Website
2.2.1 WORK PROGRESS AND ACHIEVEMENTS DURING THE PERIOD

WP2 - CONTENT

During Reporting Period 1, the main achievements are:

- Complete Task 2.1 Content Map, defining content standards for the consortium and community;
- Fill content gaps through a Community Call for Content, while promoting WP4 Call I;
- Developing a taxonomy based on T2.1 and deliver mapped content and WP4 Training Call I submitted training materials to WP3 FOSTER Portal;
- Advance Task 2.2, Establish conditions for Graduate Schools on including OS into curricula;
- Advance Task 2.3, Ongoing gap analysis to guide new content needs for WP4 e-Learning;
- Advance Task 2.4, Developing key content for Project Managers/Horizon 2020 applicants to ensure compliance with mandate at proposal formulation;
- Advance T2.5, advanced policy analysis and infrastructure (repository) analysis to support funders on most effective ways to implement and support an Open Science policy (Task 2.5)

TASK 2.1 CONTENT MAP

Following a Kick-Off workshop in Feb 2014, basic categorisation was established for potential training content. The purpose was to classify and prioritise existing training content by target group, subject focus and level of expertise that can be achieved, as well as minimum technical metadata to facilitate ingestion of the gathered content in WP3 Portal for E-Learning (cf. Deliverable D1.1 Kick-Off Report).

An online form based on agreed classification was designed (UMINHO) and a community call released in order to gather known training content per target group (all partners) and launch a call to the Open Science community in conjunction with WP5 (via social media networks for OpenAIRE projects and Open Science in general). Overall, 146 resources have been identified and classified.

HATII-DCC has delivered “D2.1 Technical Protocol for Content Classification” to WP3, based on which the “Open Science Taxonomy” was created and content uploaded into the WP3 Portal (EIFL).

Content gathering will continue in conjunction with events funded by WP4 Training Calls to provide content in support of WP4 Short Courses and e-Learning strategy.
DTU has engaged with three graduate school clusters, to test initial interest and possible steps towards negotiating basic conditions under which ERA Graduate Schools would consider Open Science as essential research skill:

- **University of Helsinki Graduate Schools**, 20 Oct 2014, jointly with Ministry of Education; 
  Disciplines: Biomedical, Natural Sciences;
- **Université Européenne de Bretagne**, ad hoc discussions; 
  Disciplines: Marine Sciences;
- **FUTURE OCEAN Cluster of Excellence**, ad hoc discussions. 
  Disciplines: Marine Sciences & Climate Change.

The clusters are very keen to integrate OS into the graduate curriculum in principle, but uncertainties that institutions have the sufficient in-house training capacity to maintain such courses at every step of the Research Lifecycle, cause apprehension.

While delivering a Training Session to 36 Graduate School administrators from Biosciences and Natural Sciences at the University of Helsinki, participants were asked to define their measures of success for a Graduate School, and listed concerns and/or barriers to implementing Open Science in the standard curriculum.

**Measures of Success for Graduate Schools:**

Three criteria were persistently identified by participants:

1. High number of Post-Graduates recruited;
2. High number of peer-reviewed publications per graduate, with a high Impact Factor (IF);
3. Good career chances, within or outside of academia.

Participants were offered practical means how Open Science tools and practices can contribute in concrete terms to the latter two measure of a successful Graduate School:

**High number of peer-reviewed publications**: via the availability of new and respected Open Access journals permitting peer-reviewed publication of primary research data, research software and research papers, as well as increased visibility of the researcher profile;

**Career Chances (in academia)**: via increased “societal impact” and preparation of graduates for the evolving Research Excellence Framework (REF) evaluation criteria shifting importance away from the Impact Factor (IF) and towards “societal impact” (measured as transfer and exploitation of knowledge outside academia, SMEs, citizen scientists, and society at large). In addition, administrators were demonstrated how Open Science can be an effective tool drafting more competitive research proposals based on “Winning Horizon 2020 with Open Science” brief (Task 2.4 output).
Concerns on Capacity to Implement Open Science in the Curriculum:

Participants were positive towards Open Science as a necessary skillset that future graduates must have, and that there is a significant level of maturity in the Open Science philosophy, practices and infrastructure, to support each step of the Research Lifecycle, from performing experiments in new collaborative ways online (simple precursors to Virtual Research Environments), to publishing primary data and research software in peer-reviewed journals, to optimizing on Green and Gold Open Access strategies.

As certification of courses (ECTS certificates) is workload-dependent, administrators were positive that certification is not a barrier to implementation, however there is significant concerns expressed with the existing institutional capacity to “teach and train” this new skillset, at each step of the Research Lifecycle.

Concerns expressed focused on institutional capacity (Knowledge Managers & researchers teaching graduates) to deal with expected challenges on:

- Open Data and Linking Data to publications;
- Discipline-specific Research Data Management practices and long-term archiving alternative infrastructure, where local (and/or institutional) repositories are not available;
- Data mining, data handling and data transformation capacity in data intensive disciplines, leading to enhanced and more sophisticated support for large data mining and large data manipulation training for graduates;
- Software archiving, versioning and publishing in peer-reviewed journals;
- Optimizing career profile visibility and impact based on Open Science (e.g. capitalizing on altmetric in a way that is aligned with expected REF2020 evolution towards measures of “societal impact” of research).

The feedback from the Graduate Schools suggests that Graduates Schools may be unaware of the full Open Science training capacity of their in-house Knowledge Managers, or that there is a need for more specific “Train-the-trainer” initiatives to fill the competence gap.

WP4 Call for Training (round II) has placed priority on engaging graduates and Graduate Schools, resulting in several training programmes targeting graduates that will be co-funded in 2015.

Discussions with Graduate Schools administrators has provided basis for Learning Objectives as part of “Deliverable 2.3 Content and Learning Objectives per Target Group”.

**TASK 2.3 INSTITUTIONAL SUPPORT, “TRAIN THE TRAINER” CONTENT**

Task 2.1 and Deliverable D2.1 are currently under gap analysis (TU Delft) to identify future content needs and optimize “train the trainer” events during 2015 events of WP4 Call II beneficiaries. The results will

1 HEFCE REF2020 Consultation [http://www.hefce.ac.uk/whatwedo/rsrch/rinfrastruct/oa/]
feed into WP4 Call II events, as well as further contribute to WP4 Deliverable 4.2 “Toolkit for training sessions with recommendations on most efficient use of training kits per stakeholders”.

Gaps & Recommendations

Gaps:
# 1 Role and position of Open Education as part of Open Science is underexposed MOOC's, OpenCourseWare, Online education as vital instruments of Open Science should be included

# 2 Open Access as business model is underexposed
Author Publication Fees (APC’s) are a vital tool in the Open Access business model. There economics should be interpreted and clarified along with negotiation skills for administrators to get better Open Access deals.

#3 Relation between funders and Open Access should become more explicit

General Recommendations:

- Clean-up content because of duplication or content Quality issues (form or editorial review)
- Remove at regular base obsolete content
- Manage the uptake and adapting new content

In response to some of the concerns raised about institutional capacity to support Open Science graduate training along the full Research Lifecycle, DTU published a short strategy on how the OS community of advocates and trainers, can engage researchers in the context of the Horizon 2020 Mandate. The communication outlines how Knowledge Managers can re-brand the image of Open Science into an essential tool for performing impacting research, and was published in the D-Lib Magazine for Librarians and Knowledge Managers.
HATII-DCC provided a new Research Data Management training content module and institutional support for social science librarians that was included in the very first WP4 Training Event in Ljubljana on June 18, 2014, and included in FOSTER Portal (WP3).

CSIC and DTU jointly with the Spanish Network of University Libraries (REBUIN) have contributed to program drafting of a workshop for 2015 with the motto “The Horizons of Open Repositories” to explore repository issues and recent Open Science policies.

UMINHO has reformatted training content for repository managers in Portuguese following two training workshops (Universidade Nova de Lisboa and Universidade de Aveiro) on “How to make your repository H2020 ready” which will also be prepared as a Short Self-Learning Course for WP4 “Task 4.3 Training for Institutions”.

**TASK 2.4 CONTENT FOR PROJECT MANAGERS**

Between Feb-Sept 2014, FP7 FOSTER partners and FP7 OpenAIRE Plus developed a generic and modular “brief” for Horizon 2020 applicants. The text deals directly with the application process (Part B, Section 2.2 Impact) in response to the Horizon 2020 Mandate (Grant Agreement, article 29.1-6).

The objective of the brief is to demonstrate to applicants that Open Science integrated into the research concept at proposal stage can make the evaluation more competitive, and facilitate knowledge transfer and optimize impact at project implementation phase.
The “Winning Horizon 2020 with Open Science” brief was developed and tested with 4 Marie Curie European Training Networks (MC ETN in April 2014 and January 2015 Call Deadlines), and 4 Research & Innovation proposal in Societal Challenges 2 & 5 (2014 Calls).

The brief can compliment existing Horizon2020 training courses on “How to apply to Horizon 2020?”, “How to implement Horizon 2020 projects?”. Input and feedback will be sought from Funders through Task 2.5 Partners and FP7 PASTEUR4OA Project.

**TASK 2.5 FUNDING BODIES**

SPARC-E and UMINHO are a strong link between FP7 FOSTER and FP7 PASTEUR4OA, based on which WP2 created content will be tested with Funders (e.g. “Winning Horizon 2020 with Open Science”).

SPARC-E has produced an OA Policy Analysis to be summarized into a briefing paper for policymakers (to be released in February 2015) that can also be used as training material when engaging funder. The analysis demonstrates that the most critical components of a policy are to mandate deposit of articles at acceptance for publication, and to link the deposit of articles with performance assessment as suggested for REF2020 in the UK. The briefing paper also addresses how these findings can be of use to research funder policymakers.

The briefing paper will form the basis for a Short Course in 2015 aimed at policymakers in funding agencies and institutions, to be delivered to the WP3 Portal.

SPARC Europe has produced a report on a survey of repository managers to investigate what kinds of infrastructure support is provided in institutions once a policy is adopted. The findings are of use in developing guidelines for institutional managers on good practice in this regard, and will also be part of the planned Short Course to be developed by Task Partners in 2015.

In addition, UMINHO, EIFL, UGOE and DCC-HATII developed and delivered training materials for the course “Open Access Requirements to publications and research data in Horizon 2020” targeted to H2020 Project Officers from the European Commission and the agencies. The FOSTER sessions were presented between June 25-27, 2014 in Brussels, and the outcome promoted to LinkedIn professional groups on Project Management linking to Task 2.4.

CSIC and HATII-DCC took part in the European Research Council (ERC) Workshop on Research Data Management and Sharing (19 September 2014) to contact ERC Scientific Council Working Group on Open Access to explore potential synergies. CSIC is also exploring offering services to the Spanish Foundation for Science and Technology (FECYT).

DTU and UMINHO have also opened dialogue with EC DG CONNECT on linking OpenAIRE/ZENODO to EC Participants Portal’s Dissemination Reporting functionality, in order to reduce doubling of effort, and offer a true service to Horizon2020 Project Managers with respect to Dissemination reporting, and compliance with the OA Mandate. DTU reviewed and provided input to the Guidelines informing applicant of these new EC Participants Portal functionalities within SyGMA.
Next Priority for 2015:

- Seek feedback from funders/Pasteur4OA/Knowledge Exchange on the brief for Horizon2020 applicants “Winning Horizon 2020 with Open Science” (outcome of Task 2.4; Responsible: SPARC);

- Assist WP4 e-Learning with a short course for Funders on “What makes a successful OS policy” (following course templates discussed in Gottingen) based on Repository Survey and Policy Regression Analysis (Responsible: SPARC David Ball, ALL TASK PARTNERS).

- Engage Horizon 2020 National Contact Points (NCP) across all Societal Challenges, via EC or Key Node organisations in FP7 PASTEUR4OA (or national contacts; PASTEUR4OA) in support of “WP4 T4.6 HelpDesk” to inform NCPs on how they can support Horizon 2020 applicants with respect to Open Science (Responsible: SPARC David Ball, ALL TASK PARTNERS).

Milestones:
MS4 Joint workshop with WP3 and WP4 (Month 3)
Status: Decide not to hold it and have several ad hoc Skype meetings (Month 2 and Month 3).

MS5 Advanced negotiations with 10 ERA schools for integration in postgraduate curriculum (Month 12)
Status: UNESCO-CESAER Workshop for Graduate Schools planned for Month 17

MS6 Test content at an EU project manager association Annual General Meeting (Month 9)
Status: LIBER (Partner 6) invited to EARMA Annual Meeting, June 2015 (Month 18)

WP3 – CONTENT DELIVERY

During Reporting Period 1, the main achievements are:

- Conclusion of the requirements analysis and system architecture

- Creation of uses cases and specification

- Deployment of FOSTER Portal Release Candidate 1 and Release Candidate 2
WP3 has in this reporting period met all its objectives. There were no deviations from the work plan. The package has collaborated and coordinated its effort with other work packages, primarily WP2 and WP4.

TASK 3.1 REQUIREMENTS ANALYSIS AND SYSTEM ARCHITECTURE

This task has been finalised according to the plan within the first three month of the project by the submission of D 3.1. Open University (OU) has first carried out a survey to consult the project partners about the high-level principles according to which the portal should operate and to collect a set of requirements. A document providing a detailed analysis of the answers has then been made available to the project partners. The survey results were presented together with relevant questions stimulating the discussion during a series of recorded virtual consultations. The conclusions from these discussions were again fed back to the document and were available for comments to all members of the consortium.

Secondly, OU has used the results of the requirements gathering phase to create the use case specification. TU Delft (TUD) contributed in this process. We have used the Unified Modelling Language (UML) to achieve this and the details are available in Section 3. Once the use cases have been drafted, we have again made the specification available to the project partners for comments. We have responded to these comments and have integrated them where applicable.

Thirdly, OU has designed the system architecture with the aim to understand how to effectively develop or customise software that will support the identified use cases. We identified relevant existing software modules and analysed how they can be re-used in the FOSTER context. This led to the specification of these packages with suggestions on how they will be developed. The expected software packages were also cross-checked with the use cases to ensure that there is no software developed without a supporting use case as well as ensuring that we have software packages to support all expected functionalities. The system architecture has been made available to the Project Steering Committee (PSC) for comments. TUD also provided feedback and assisted in the discussion of technically related issues.

When the use cases and the system architecture were specified, OU created a draft of user interfaces, based on wireframes, supporting some of the more prominent use cases. Finally, OU and TUD discussed and provided a development roadmap, which defines the priorities for the development and customisation of software modules. It splits the development of the portal into three Release Candidates (D3.1, page 40) with specification of the functionality of each of them.

TUD also worked in collaboration with WP4 on developing guidelines for training the trainers. OU commented on this document and provided feedback.

TASK 3.2 THE FOSTER TRAINING PORTAL

OU finished the development of the first Release Candidate (RC1), which has been completed in July 2014. This is the result of a process in which OU selected the development platform (Web Framework), and implemented a range of modules for uploading content and content conversion, submission of articles and viewing of content, commenting, sharing, events submission and organisation and user profile and registration.
Recently, OU completed the development of Release Candidate 2 (RC2) exactly according to the development plan reported in “D3.1 – Requirements analysis and system architecture”.

The development progress is shown in Figure 4.
The main development of activities in the last 6 months included the development of the Open Science taxonomy lead by OU and supported by participants from WP2 and its implementation and integration in the FOSTER portal.

The taxonomy was needed for a number of purposes including:

- to provide facilities for navigating and browsing FOSTER content
- as a structure to which users can subscribe to receive updates (for example notifications on new content)
- to provide a structure using which reviewers will be able to specify their expertise. This is necessary to organise the review process as described in D2.1 – Technical Protocol for rich metadata categorization and content classification.
- to provide facilities for linking and recommending related content on the portal
- to provide a map of topics to inform learners on the areas of Open Science
- to ensure that the training content on FOSTER covers all areas
- to serve as a structure for the helpdesk service

A number of iterations of the taxonomy have been circulated for feedback until it has been approved. The final version is available in Figure 5.

Figure 4 - FOSTER Open Science taxonomy

Another important activity has been the development of the eLearning modules. These include modules for setting up, tracking and monitoring courses on the FOSTER portal. The progress here has been documented in the recent D3.2 – The FOSTER Portal.

**TASK 3.4 - CONTENT UPLOAD, DELIVERY PROCESS AND TRAINING PORTAL TESTING**

TU Delft have led the task of uploading training content to the FOSTER portal and organising this with WP2. All the content initially identified by WP2 in Task 2.1 has been uploaded to the portal and classified according to the taxonomy. We have also carried out statistics regarding the topical balance of the identified content. This will inform further efforts of WP2 in sourcing content for the subject areas not sufficiently covered.

OU has subsequently developed a tool, for the purposes of the consortium, showing how the training content is distributed across the Open Science categories. The tool is available at [https://www.fosteropenscience.eu/topics/overview](https://www.fosteropenscience.eu/topics/overview).
During Reporting Period 1, the main achievements are:

- Two Calls (February for training in 2014, and October, for courses in 2015) for community training courses co-funded by FOSTER with a high response rate
- Support to 17 community training projects, encompassing 66 training events
- Establishment of FOSTER Training Programme and Schedule (D4.1)
- Training for EC project officers on H2020 Open Access and Open Data requirements
- Development of the Toolkit for Training (D4.2)

**TASK 4.1 – TRAINING SCHEDULE FOR ALL STAKEHOLDERS AND TRAINING PROGRAMMES IN ERA COMMUNITY SUPPORT**

All past, ongoing and future training events can be consulted in the ‘events’ section on the FOSTER portal: [https://www.fosteropenscience.eu/events](https://www.fosteropenscience.eu/events)

**FOSTER CALL FOR OPEN SCIENCE TRAINING 2014**

The work on this task started immediately at month 1, by discussing and defining the conditions, evaluation criteria, rules and calendar for the first call for community courses, in June-December 2014, co-funded by FOSTER. The Call was issued and disseminated through several channels (mailing lists, Twitter, Facebook, etc.) from February 3rd onwards.

The deadline for the applications was March, 17th. During the period when the Call was open participants in WP4 have continued the discussion and definition of the evaluation procedure and calendar, according to the following evaluation criteria initially defined and made public:

- Aims and topics of the proposed events, targeting open access and open science practices, in particular in relation to publicly funded research in Horizon 2020 and national funding schemes;
- Outreach potential (number of relevant stakeholders directly involved on the training event);
- Potential for “multiplication” (institutional or disciplinary) of train the trainers programmes;
- Level of engagement with Graduate Schools and embedding in standard curriculum;
- National/regional diversity;
- Disciplinary diversity;
- Cost-efficiency.

During this first call, 45 training proposals, from 19 countries (Austria, Belgium, Bulgaria, Croatia, France, Germany, Greece, Hungary, Lithuania, Malta, the Netherlands, Poland, Portugal, Serbia, Slovakia, Slovenia, Spain, Switzerland and the UK), have been submitted.

The evaluation process started in the second half of March and was conducted in two stages. In the first stage PSC members and task leaders from WP4 (CSIC, DTU, EIFL, HATII-DCC, LIBER, UGOE and UMinho) have independently evaluated and scored each proposal.

In the second stage, after completion and collecting the individual evaluations, and producing a total evaluation score, resulting from the individual scores, two online meetings were held to discuss the evaluation of each proposal, harmonize and consolidate them, and, taking into consideration the financial limit of 100,000,00€ for supporting courses in the first call, select the proposals that would receive FOSTER support and co-funding.

Resulting from this process, 19 proposal from 14 countries (Belgium, Bulgaria, Croatia, Denmark, France, Germany, Greece, Hungary, the Netherlands, Poland, Portugal, Slovenia, Spain and the UK) were selected. These 19 training proposals involved a total of 66 initiatives, as some of them are series of courses. A complete and detailed account of the training events selected on the first call, as well as other training courses organized by FOSTER can be found on the FOSTER Detailed Training Schedule (Deliverable 4.1).

Immediately after the selection process EIFL communicated the results to all those who submitted their proposals, and initial contacts with the organizers of the selected events, in particular the ones occurring in June/July, were established.

Two of the selected training courses (Open Access: Moving from Policies to Best Practices, Central European University (Hungary) and Integrating the use of GIS in several subjects, European Association of Geographers (Belgium)) have been cancelled by the training event organizers.

In 2014 FOSTER co-funded 17 training programmes on open access, open data and open science (over 70 events) in 13 countries (Belgium, Bulgaria, Croatia, Denmark, France, Germany, Greece, the Netherlands, Poland, Portugal, Slovenia, Spain and the UK) in diverse formats attended by over 1700 researchers, students, project managers, research administrators, librarians and policy makers. The total amount of funding for this first Call was 83,221.13 € - as of date (February 2015) not the whole amount will have been used. The leftover funds will be used for the 2015 Call.

FOSTER CALL FOR OPEN SCIENCE TRAINING 2015

The second call for to host FOSTER training events on open access, open research data and open science to be held from January to November 2015 was announced on October 1st, 2014 with the deadline for submissions of November 14, 2014.

FOSTER Project Steering Committee and WP4 Task Leaders – UMinho, UGOE, DTU, HATII-DCC, CSIC and EIFL – evaluated 80 training proposals (one organization – one vote) received. Proposals have been submitted from 28 countries (Austria, Belgium, Bulgaria, Croatia, Cyprus, Czech Republic, Denmark, Estonia, Finland, France, Germany, Greece, Hungary, Ireland, Italy, Italy, Latvia, Lithuania, Malta, Netherlands, Norway, Poland, Portugal, Serbia, Slovenia, Spain, Netherlands, Turkey, United Kingdom and even one from the United States), and like in the first call it was overall a good selection of proposals in
terms of topics covered, diversity of events planned, diversity of approaches (institutional, national, discipline specific) and geographical and language diversity.

Overall, we had the impression that most proposals were of a higher quality than during the first call, making the decision process even more difficult. We’ve used similar evaluation criteria (as during the first call evaluation) although this time the criteria ‘Engagement with Graduate Schools’ was dealt with in the least strict manner, because it was not relevant for some proposals.

Each organization provided evaluation results and final scores before the skype meetings in December 2014. LIBER and SPARC Europe have also provided evaluation results that have been taken into account during the final project selection process.

The Evaluation Team has selected 24 training programmes from 18 countries (Austria, Belgium, Cyprus, Czech Republic, Denmark, Estonia, Finland, France, Germany, Greece, Ireland, Italy, Latvia, Lithuania, Malta, Netherlands, Spain and United Kingdom). These will all take place in 2015.

**OTHER TRAINING EVENTS**

Simultaneously with the selection of community promoted events, UMinho and other participants in WP4 have been exploring the possibility to organize or participate in other training activities in line with the project objectives. During 12 months of the project, FOSTER partners have organized and/or participated in the following training events:

“Open access to EGI (European Grid Infrastructure) research outputs”. Helsinki University, Finland, 21 May, 2014


Open Science: Engaging Finland’s Doctoral Schools, Helsinki, Finland, 20 October, 2014.

Open access training for the European Federation of Psychology Students’ Associations, Dobra Voda, Serbia, 28 October, 2014.

4 Webinars jointly organized with OpenAIRE during OA week: https://www.fosteropenscience.eu/event/openaire-webinars-during-oa-week-2014

During Open Access Week (October 2014) Couperin in France supported 22 projects that have organized 33 events partially supported with FOSTER funds, reaching more than 500 participants and with participation of 44 institutions. Couperin also created badges and posters, and a dedicated website with 4 clips promoting Open Access: http://www.oaweekfrance.org/ (the clips are also available on YouTube)

Finally, as planned in the DoW, UMinho compiled and analysed all the training initiatives, created and submitted the **Deliverable 4.1 – Detailed Training Schedule**. The Deliverable is organized in three main sections describing the training programme.

The information collected in this Task T4.1 was delivered to and integrated with the dissemination (WP5) and the content delivery (WP2) Work packages. A training calendar² is available on FOSTER website and FOSTER portal to let everyone know where and when the FOSTER initiatives (and other related courses) take place.

The training schedule, and the Deliverable D4.1 are being updated for 2015 training events.

![Figure 5 - Map of FOSTER Training Program by Country](https://www.fosteropenscience.eu/events)

**E-LEARNING COURSES**

Some of 2015 FOSTER co-funded events include e-learning modules and FOSTER team will facilitate their creation. In addition, we are discussing possibilities to run at least five self-learning courses and at least five moderated e-learning courses for academic staff & students, research administrators & librarians, research project managers & staff working in funding bodies.

² [https://www.fosteropenscience.eu/events](https://www.fosteropenscience.eu/events)
## TASK 4.2 – TRAINING SESSIONS FOR ACADEMIC STAFF (RESEARCHERS) AND STUDENTS

In 2014 FOSTER co-funded 15 training programmes targeting **academic staff (researchers) and students**, listed below:

1. Belgium: Boo(s)tcamp Open Science (60 people attended), EIFL contributed to the training programme;
2. Bulgaria: Autumn training school “Development & promotion of open access to scientific information and research” (20 people attended), DTU, EIFL and UMinho contributed to the training programme;
3. Croatia: Open science – all you want to know about open access, open data and new trends (482 people attended – all stakeholders), SPARC-Europe contributed to the training programme;
4. France: Publication and open access: Challenges and opportunities (120 people attended);
5. Germany: CoScience - Gemeinsam Forschen und Publizieren mit dem Netz (ongoing), UGOE contributed to training programme;
6. Germany: Open Humanities @ The Humanities & Technology Camp (THATCamp) (70 people attended), UGOE contributed to training programme;
7. Germany: Open access ambassadors @ Max Planck (70+ people attended), UGOE contributed to training programme;
8. Greece: OS3: Open Scholarship Summer Seminar (60 people attended);
9. The Netherlands: Workshop on open workflows for quantitative social scientists (12 people attended);
10. Poland: Training the trainers on open access & open science (ongoing);
11. Portugal: Post-Conference (Portuguese-Brazilian Open Access Conference) Workshops on open access in H2020 (81 people attended), UMinho contributed to the training programme;
12. Slovenia: Research data management and open data (52 people attended), DCC contributed to the training programme;
13. Spain: Training young researchers for an open future (300 people attended), CSIC contributed to the training programme;
14. UK: [Discovering open practices for PGR and early career researchers](http://www.foster-eu.org/) (34 people attended);
15. UK: [Funders’ research publications policies: what researchers need to know](http://www.foster-eu.org/) (75 people attended), DCC contributed to the training programme.

On June 24, 2014 EIFL presented the project to the representatives of the following young researchers associations at the European Young Researchers platform meeting at the European Science Forum in Copenhagen, Denmark:

- Young Academy of Europe: [http://www.yacadeuro.org/](http://www.yacadeuro.org/)
- Scottish Crucible: [http://www1.hw.ac.uk/scottishcrucible/](http://www1.hw.ac.uk/scottishcrucible/)
- CARE – Careers Advisers supporting Researchers in Europe: [https://www.linkedin.com/groups/CARE-Careers-Advisers-supporting-Researchers-6613591](https://www.linkedin.com/groups/CARE-Careers-Advisers-supporting-Researchers-6613591)

All of them expressed interest to collaborate with FOSTER.

FOSTER partners have been involved in organizing the following training event (in addition to the events, co-funded within the call):

**Open access training for the European Federation of Psychology Students’ Associations (EFPSA)** at the Joint Executive Board and Member Representatives meeting (100 psychology students from 32 different European countries) a network of open access trainers/advocates was created and trained on how to raise awareness on open access among psychology students and academics across Europe.

**Place:** Dobra Voda, Serbia.

**Date:** 28 October, 2014.

### TASK 4.3 – TRAINING SESSIONS FOR INSTITUTIONS (ADMINISTRATORS, LIBRARIANS)

In 2014 FOSTER co-funded five training programmes for institutions targeting research administrators, repository managers and librarians, listed below:
• Croatia: Open science – all you want to know about open access, open data and new trends (482 people attended – all stakeholders), SPARC-Europe contributed to the training programme;
• Denmark: Open access seminar for research administrators (40 people attended), DTU contributed to the training programme;
• Poland: Training the trainers on open access & open science (ongoing);
• Portugal: Post-Conference (Portuguese-Brazilian Open Access Conference) Workshops on open access in H2020 (82 people attended), UMinho contributed to the training programme;
• Open research data in Social Sciences and Humanities (37 people attended), HATII-DCC contributed to the training programme;

In addition, SPARC Europe and LIBER conducted a Joint Workshop on the FOSTER and PASTEUR4OA Projects: ‘Open Access Policy for Europe: the Implications for European Research Libraries’ at the LIBER 43rd Annual Conference, Riga, Latvia, 1 July, 2014. UMinho and EIFL have also contributed to this event.

HATII-DCC has also ran a short special interest session on Open Science on September 9, 2014 in Manchester, UK at the annual Vitae Researcher Development International Conference. The conference brought together all those with a strategic and practical role in developing researchers. An abstract of the session can be viewed at https://www.vitae.ac.uk/events/vitae-researcher-development-international-conference-2014/special-interest-sessions/copy8_of_sis1.

DTU conducted a training session “Case Example: Why Should EU Graduate Schools teach Open Science alongside research excellence?” at Open Science: Engaging Finland’s Doctoral Schools event in Helsinki, Finland, on 20 October, 2014.
In 2014 FOSTER co-funded three training events targeting research project managers (as one of the stakeholders), listed below:

1. Denmark: Open access seminar for research administrators (40 people attended), DTU contributed to the training programme;
2. Portugal: Post-Conference (Portuguese-Brazilian Open Access Conference) Workshops on open access in H2020 (81 people attended), UMinho contributed to the training programme;
3. UK: Funders’ research publications policies: what researchers need to know (75 people attended), DCC contributed to the training programme.

In addition, DTU conducted a training session “Open access to EGI (European Grid Infrastructure) research outputs” in Helsinki University, Finland, on 21 May, 2014.

DCC, EIFL and UMinho conducted four webinars in partnerships with OpenAIRE project during Open Access Week (October 20-23) covering the following topics:

- Katerina Iatropoulou (NKUA) on the new OpenAIRE portal www.openaire.eu: how to find and add publications, data and project information; how to use it as a project management tool for information about open access;
- The Horizon 2020 Open Research Data Pilot by Sarah Jones (DCC): overview of the Open Research Data Pilot in H2020: who should participate and how to comply;
- Zenodo by Lars Holm Nielsen (CERN): www.zenodo.org is a simple and innovative service that enables researchers, scientists, EU projects and institutions to share and showcase multidisciplinary research results (data and publications) that are not part of existing institutional or subject-based repositories.

The recordings of the webinars can be found here:

https://www.openaire.eu/news-events/a-successful-oa-week-openaire
https://www.openaire.eu/news-events/a-successful-oa-week-openaire
Building on Task 2.4 the partners have engaged private training companies and project managers associations, with which FOSTER trainers can cooperate on existing Horizon2020 training course on “How to apply to Horizon2020?”, “How to implement Horizon2020 projects?”:

- The European Projects Academy in collaboration with European Academy for Education and Social Research providing training courses on EU funds management, potential dates to engage: 23 - 27 February, 2015, and 20 - 24 April, 2015 (Martin Donnelly, DCC).
- EC Project Managers Association (ECPMA) through Dan North (LIBER);
- AquaTT [www.aquatt.ie](http://www.aquatt.ie).

LIBER will present at their Annual conference on 28th June - 1st July 2015 in Leiden, the Netherlands.

**TASK 4.5 – TRAINING SESSIONS FOR POLICY MAKERS AND STAFF WORKING IN FUNDING BODIES**

A half-day training programme has been developed for the staff working in funding bodies (when preparing for the EC officer trainings in June 2014 mentioned in the Task 4.1.) that includes the following sessions:

1 – Introduction: Open access in the ERA and Horizon 2020 – political and legal context  
2 – Introduction to open access, open data and open science  
3 – Horizon 2020 mandate on open access to publications (Article 29.2 of GA)  
4 – Horizon 2020 Open Research Data Pilot (Article 29.3 of GA)  
5 – OpenAIRE infrastructure and services for compliance and monitoring  
6 – Q&A, discussion, and closing

It was successfully practiced at the EC training sessions and will be used in other trainings planned. The video’s and presentations can be consulted at this link:


UMinho has also contributed to the ERC “Workshop on Research Data Management and Sharing” on 18-19 September in Brussels, Belgium.
In 2014 FOSTER co-funded two training programmes for **policy makers and staff** working in funding bodies, listed below:

1. Croatia: [Open science – all you want to know about open access, open data and new trends](#) (482 people attended – all stakeholders), SPARC-Europe contributed to the training programme;

2. Slovenia: [Open access to publications and open research data](#) (68 participants attended the training event), CSIC contributed to the training programme.

3. Collaboration has been established with Science Europe to develop a training programme targeting the staff working in funding bodies that could help to achieve their own goals described in the Science Europe Roadmap published in December 2013, and that could be embedded in their own activities.

Collaboration with OpenAIREplus and PASTEUR4OA projects have been established and we will seek opportunities for hosting joined events (like it’s already happened at LIBER and during Open Access Week).
Figure 6 - FOSTER initiatives by Stakeholders

**TASK 4.6 – HELPDESK & COMMUNITY SUPPORT**

The [FOSTER helpdesk](https://www.openaire.eu/support/helpdesk) includes:

- FAQ about the project and how to collaborate, as well as FAQs on open access, open data and open science;
- A general project email is currently used for any questions/comments, etc;
- FOSTER project will use the OpenAIRE helpdesk for any questions related to the H2020 Open Access Policy.

[https://www.openaire.eu/support/helpdesk](https://www.openaire.eu/support/helpdesk); [https://www.openaire.eu/support/faq](https://www.openaire.eu/support/faq).
Partners engaged the key target group, researchers, in a collaborative platform used by researchers to exchange data and publications and discuss open science issues. The majority of the consortium registered on ResearchGate to moderate Q&A and offer objective advise on open science issues, dispel myths and offer resources (including the projects output) for effective embedding of open science in the daily workflows.

Figure 7 - Engaging Researchers on "Open Science" within established collaborative platforms (www.researchgate.net)
The development of content for Task 2.4 Content for Project Manager, has also openly invited Horizon2020 applicants to seek advice from FOSTER Consortium on how to address the Mandate on Access to Scientific Knowledge (Grant Agreement Article 29.1-6). The activity directly consulted two Marie Curie Innovative Training Networks and 8 Research & Innovation proposal in Societal Challenges 2 & 5 (evaluation pending as of July 2014).

WP5 – DISSEMINATION AND NETWORKING

During the first months of the project, working relationships between the core partners of the work package have been developed. All project partners have presented FOSTER’s aims and activities at various events and through international and national dissemination channels. Through these dissemination activities, first contacts with main stakeholders, including research managers, project coordinators, librarians and researchers have been established. Training events of the 2014 FOSTER training calendar were accompanied by dissemination work before, during and after the event to ensure wide reach and uptake, as well as re-use of produced training material.

The main achievements of the reporting period are:

- Development of a project website which reflects the communication strategy of the project, released in February 2014 and launched on a new platform together with Training Portal in August 2014 (compare deliverable D5.1).
- Development of a detailed dissemination strategy and outline of dissemination activities, finalized in June 2014 (compare deliverable D5.2).
- Production of a range of dissemination materials, including a project logo and corporate design, news items, posters and other materials, such as MOO Cards.
- Presentation of the project at various national and international events (see list as appended below).

TASK 5.1 – DISSEMINATION

In February 2014, at the project’s kick-off meeting in Braga/Portugal, the project partners discussed and selected a logo for the project (design by Open University based on ideas from the project partners).
A preliminary teaser web page for the project was released online in December 2013, which was replaced by a basic website in February 2014. The second stage of the website was concluded in July and launched in August 2014 smoothly integrated with the pre-launched training platform. Over the course of the project the website is developed further in parallel to the development of the training portal and continuously adapted to the communication needs of the project consortium.

FOSTER serves a particular role in the current landscape of EU-funded projects in the sense that it sets out to bolster the training capacities for promoting open access, open data and open science, in particular in
the context of the European Commission’s open access mandate for Horizon 2020. Therefore, the project’s detailed dissemination plan and actions capitalize on all project activities and targets multipliers and events to promote these core topics related to open science. Events and dissemination opportunities identified in the original plan and many more added in the live version of the dissemination events calendar are attended by the identified consortium partners. FOSTER’s aims and activities as well as emerging results as the project matures are being presented to the widest possible audience with specific focus on the identified stakeholders and liaison contacts the help to achieve sustainability over the duration of the project. New opportunities for dissemination are monitored and taken into account so that the second project year will achieve an even wider attention in the relevant communities.

All dissemination, as well as training events are closely supported by the dissemination team, making sure that the event is widely announced, visible on social media and reported through news items on community platforms as well as the FOSTER website. With the opportunity to upload training content to the FOSTER portal, not only the events but also the training materials can be included in the communication. Particular useful, high quality material is featured and highlighted to stimulate re-use. Experiences of re-packaging and using the provided training material in similar learning scenarios are fed back into work packages 2 and 4 as quality control instrument.

Partners established a highly followed Twitter channel (743 followers by January 2015) with good re-tweeting rate, forming a community around Open Science topics through which events and upcoming project outputs can be disseminated. Here are some graphics that show the traffic on our Twitter account and the progression of the project’s followers.

![Figure 10 Traffic on FOSTER Twitter account (Sept – Dec 2014)](image_url)
TASK 5.2 - COMMUNITY ALIGNMENT

This task serves the strategic purpose of bolstering the dissemination activities of FOSTER by high-level liaison with current and emerging initiatives. Currently, through a landscape scan relevant target groups and initiatives are collected and assessed. The groups and institutional types with which FOSTER will engage can be listed as follows:

- University Associations (LERU, COIMBRA, EUA, EAIE, etc.)
- Funders (EC, ERC, ESF, Science Europe, Knowledge Exchange, etc.)
- Open Science/ Open Access Initiatives (SPARC Europe, OKF, COAR, etc.)
- Research Administrators (EARMA, NCPs, EuroRIsNet, etc.)
- Senior University Decision Makers
- Publishers, Librarians, Library Managers, NGOs, companies involved in EU projects, etc.
By the end of September 2014, we had compiled a list of liaison activities with identified stakeholders and targeted audiences. These were outlined in the milestone document (MS10) ‘Identification of Liaison Activities’. The document described and classified a range of parallel projects, conferences, research organisations and other possible interesting parties with whom FOSTER could pursue mutually beneficial collaborations and communications. By January 2015 (M12), this work was expanded into a ‘Report on Liaison Activities’, which accounted for the methods through which a community of interested parties and beneficiaries had been identified and engaged. It gathered information about the varied ways in which FOSTER partners had engaged with the broader research community and forged productive liaisons with targeted stakeholders. It also outlined a series of goals for the second year of the project, pushing towards development and consolidation of existing liaison partnerships. To alleviate some of the problems encountered with efficiently recording the various liaison activities, we have created a shared spreadsheet of community contacts in which FOSTER members can record any of the multiple stages of their relationships with partner organisations.

**TASK 5.3 – TRAINING EVALUATION**

The work on this task has started in autumn 2014 (month 8). The first training events of the 2014 calendar began in July 2014 and were evaluated from September 2014. Evaluation forms were developed in close collaboration with WP4, in particular to discover which topics have been covered well and which need further strengthening in the 2nd training call (October 2014). Evaluation of current and future training events will focus on the feedback on usability of the FOSTER training portal as well as the provided training material, so this can be improved and adapted to facilitate future usage.

**Partner details**

- The University of Gottingen (UGOE) coordinated the work of the work package, the re-launch and review of the website and produced dissemination materials. At UGOE the post of project officer was filled in April 2014.
- LIBER contributed to workshops and presented the project at various events and through news items on the LIBER website, and the mailing list of its 400+ member institutions. In addition, LIBER developed targeted liaison activities and the liaison report.
- The University of Minho (UMINHO) developed the preliminary website and contributed to the re-launch of the project website and presented the project at various events.
- EIFL supported the dissemination activities through the dissemination of news and presenting the project at events.
- University of Warsaw (UWARSAW) / ICM has selected the software, developed the stylesheets and hosts the project website, also held a training on open science.
- Open University (OU) designed the project logo and presented the project at a community conference.
- SPARC Europe organized several workshops and presented the project at various events.
- The Digital Curation Centre (DCC – hosted by University of Glasgow and University of Edinburgh) has published a blog post about the training for EC project officers on open access and open data in...
Horizon 2020 which was published in the DCC’s blog and the FOSTER website, and several speakers presented FOSTER at numerous conferences and workshops.

- The Technical University of Denmark (DTU) presented FOSTER at events and investigated in liaison opportunities, in particular with researchers, research administrators and graduate school officials.
- Couperin assisted in the dissemination of news items and the review of the website.
- Consejo Superior de Investigaciones Científicas (CSIC) assisted in the dissemination of news items and a review of the website.

In the Liaison Report (deliverable D5.3) several of the events mentioned below are described in more detail, as most of them served not only dissemination objectives, but also engagement with stakeholders to form longer lasting liaisons to support FOSTER aims in the future.

List of events

<table>
<thead>
<tr>
<th>Date</th>
<th>Location</th>
<th>Event/URL</th>
<th>Type &amp; Size of Audience</th>
<th>Contribution</th>
<th>Who attended</th>
</tr>
</thead>
<tbody>
<tr>
<td>13 Mar, 2014</td>
<td>Amsterdam</td>
<td>RECODE Workshop <a href="http://recodeproject.eu/events/recode-workshops/">http://recodeproject.eu/events/recode-workshops/</a></td>
<td>Research managers, librarians, etc.</td>
<td>Presentation</td>
<td>Dan North, Susan Reilly</td>
</tr>
<tr>
<td>21-22 May, 2014</td>
<td>Athens</td>
<td>OpenAIRE/COAR Conference</td>
<td>Repository managers, project</td>
<td>Poster</td>
<td>Birgit Schmidt</td>
</tr>
<tr>
<td>Date</td>
<td>Location</td>
<td>Event Name</td>
<td>Topic</td>
<td>Type</td>
<td>Presenters</td>
</tr>
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</tr>
<tr>
<td>6 Jun, 2014</td>
<td>Brussels</td>
<td>LERU Seminar on Open Scholarship</td>
<td>Research managers, policymakers, etc.</td>
<td>Presentation</td>
<td>Susan Reilly</td>
</tr>
<tr>
<td>9-13 Jun, 2014</td>
<td>Helsinki</td>
<td>Open Repositories (OR14)</td>
<td>Repository Managers</td>
<td>Poster</td>
<td>Petr Knoth, Eloy Rodrigues</td>
</tr>
<tr>
<td>10 Jun, 2014</td>
<td>Rome</td>
<td>EAHIL 2014</td>
<td>25 Biomedical research librarians</td>
<td>Workshop</td>
<td>Vanessa Proudman</td>
</tr>
<tr>
<td>2-5 Jul, 2014</td>
<td>Riga</td>
<td>LIBER14</td>
<td>Approx. 350 Delegates, ca. 80 participants in the workshop, research librarians</td>
<td>Poster, Pre-Conference workshop, contribution to panel discussion</td>
<td>Birgit Schmidt, Eloy Rodrigues, Lars Björnshauge, Iryna Kuchma, Dan North, Alma Swan, Vanessa Proudman</td>
</tr>
<tr>
<td>15-17 Jul, 2014</td>
<td>Berlin</td>
<td>Open Knowledge Festival</td>
<td>Researchers, journalists, open data practitioners</td>
<td>Poster, discussion</td>
<td>Gwen Franck, Astrid Orth</td>
</tr>
<tr>
<td>8-9 Sep, 2014</td>
<td>Köln</td>
<td>National Open Access Days</td>
<td>German Open Access community</td>
<td>Poster</td>
<td>Astrid Orth</td>
</tr>
<tr>
<td>Date</td>
<td>Location</td>
<td>Event Description</td>
<td>Multipliers</td>
<td>Event Type</td>
<td>Presenter(s)</td>
</tr>
<tr>
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<tr>
<td>09 Sep 14</td>
<td>Manchester</td>
<td><a href="https://www.vitae.ac.uk/events/vitae-researcher-development-international-conference-2014">Vitae Researcher Development Annual Conference</a></td>
<td>Multipliers that have a strategic and practical role in developing researchers</td>
<td>Special interest session</td>
<td>Joy Davidson</td>
</tr>
<tr>
<td>15-17 Sep, 2014</td>
<td>Norwich</td>
<td><a href="http://www.tgac.ac.uk/allbio-open-science-reproducibility-best-practice-workshop/">TGAC - AllBio: Open Science &amp; Reproducibility Best Practice Workshop</a></td>
<td>30 Invited researchers</td>
<td>Discussion, Presentation</td>
<td>Ivo Grigorov</td>
</tr>
<tr>
<td>22-24 Sep, 2014</td>
<td>Amsterdam</td>
<td><a href="https://www.rd-alliance.org/plenary-meetings/rda-fourth-plenary-meeting.html">Research Data Alliance meeting</a></td>
<td>Researchers, research data managers</td>
<td>Presentations</td>
<td>Birgit Schmidt, Kevin Ashley, Joy Davidson, Sarah Jones</td>
</tr>
<tr>
<td>25 Sep, 2014</td>
<td>Amsterdam</td>
<td><a href="http://recodeproject.eu/events/recode-workshops">RECODE workshop</a></td>
<td>60 Policy makers, data managers</td>
<td>Presentation, dissemination</td>
<td>Sarah Jones, Birgit Schmidt, Lars Bjørns Hauge</td>
</tr>
<tr>
<td>29 Sep - 1 Oct, 2014</td>
<td>Copenhagen</td>
<td><a href="http://www.normer.uio.no/events/normer-annual-meeting--">NorMER Annual Meeting 2014</a></td>
<td>30 Marine researchers</td>
<td>Talk</td>
<td>Ivo Grigorov</td>
</tr>
</tbody>
</table>


<table>
<thead>
<tr>
<th>Date</th>
<th>Location</th>
<th>Event Description</th>
<th>Audience</th>
<th>Type</th>
<th>Presenter(s)</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 Oct, 2014</td>
<td>Middelfart</td>
<td>DEIC (Danish E-Infrastructure Corporation) Annual Conference</td>
<td>150 Data and repository managers</td>
<td>Presentation</td>
<td>Kevin Ashley</td>
</tr>
<tr>
<td>6-8 Oct, 2014</td>
<td>Coimbra</td>
<td>Luso-brazilian Open Access Conference</td>
<td>180 participants</td>
<td>Poster</td>
<td>José Carvalho, Eloy Rodrigues, Pedro Príncipe</td>
</tr>
<tr>
<td>13-14 Oct, 2014</td>
<td>Berlin</td>
<td>Open Science Days (Max Planck Digital Library)</td>
<td>80 Participants, researchers &amp; specialists from inside/outside the Max Planck Society</td>
<td>Lightning Talk</td>
<td>Astrid Orth, Najla Rettberg</td>
</tr>
<tr>
<td>20 Oct, 2014</td>
<td>Helsinki</td>
<td>Open Science: Engaging Finland’s Doctoral Schools</td>
<td>Doctoral school administrators &amp; staff</td>
<td>Presentation</td>
<td>Ivo Grigorov</td>
</tr>
<tr>
<td>20-21 Oct, 2014</td>
<td>Kathmandu</td>
<td>Open Access Workshop</td>
<td>Students, researchers, librarians and policy makers</td>
<td>Presentation</td>
<td>Iryna Kuchma</td>
</tr>
<tr>
<td>21-22 Oct, 2014</td>
<td>Online</td>
<td>OpenAIRE Webinar</td>
<td>Research administrators, EU project managers, data and repository managers,</td>
<td>Presentations</td>
<td>Sarah Jones, Eloy Rodrigues</td>
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<td>Event Title</td>
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<td>22-23 Oct 2014</td>
<td>Brussels</td>
<td>APA (Alliance for Permanent Access)/APARSEN launch of APA Centre of Excellence (CoE)</td>
<td>Dan North, Melanie Imming</td>
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<td>Cyprus</td>
<td>University of Cyprus Open Access event</td>
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<td>29 Oct 2014</td>
<td>Göttingen</td>
<td>Open Access and Open Data in H2020 – Training for Multipliers</td>
<td>Astrid Orth, Birgit Schmidt</td>
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<td>6 Nov 2014</td>
<td>Madrid</td>
<td>REBIUN annual conference</td>
<td>Kevin Ashley</td>
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<td>Istanbul</td>
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<td>Iryna Kuchma</td>
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<td>Location</td>
<td>Event</td>
<td>Participants</td>
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<td>15-17 Nov, 2014</td>
<td>Washington DC</td>
<td>OpenCon 2014</td>
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<td>25 Nov, 2014</td>
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<td>ICKM (International Conference on Knowledge Management)</td>
<td>150 delegates</td>
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<td>27 Nov, 2014</td>
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<td>Addis Ababa University (AAU) Open access policy Workshop</td>
<td>Policy Makers</td>
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<td>London</td>
<td>Train the Trainers - Open Access Requirements to publications and research data in Horizon 2020</td>
<td>Researchers and students</td>
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<td>5 Dec, 2014</td>
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<td>Researchers</td>
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<td>9 Dec, 2014</td>
<td>Ljubljana</td>
<td>University of Ljubljana: Data management round table</td>
<td>25 delegates</td>
<td>Informal presentations</td>
<td>Martin Donnelly, Angus Whyte</td>
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<td>16 Dec, 2014</td>
<td>Poznan</td>
<td>Library of Poznań University of Technology, BazTech consortium</td>
<td>Open Science/ Open Access initiatives, publishers</td>
<td>Seminar</td>
<td>ICM</td>
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<td>16 Jan, 2015</td>
<td>Athens</td>
<td>RECODE Final conference</td>
<td>Data managers, funders, publishers, research institutions (80 participants)</td>
<td>Presentation, Panel session</td>
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<td>20-21 Jan, 2015</td>
<td>Berlin</td>
<td>Academic Publishing in Europe (APE)</td>
<td>Publisher, librarians</td>
<td>Dissemination</td>
<td>Birgit Schmidt</td>
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</tbody>
</table>
List of publications


On the training track – European project sets out to facilitate Open Science, Press release, 26 February 2014


UMinho dissemination of the call for content and FOSTER Portal at RCAAP Blog, dedicated to the Portuguese community of repository managers and journal editors: [http://blog.rcaap.pt/?s=foster&submit=Procurar](http://blog.rcaap.pt/?s=foster&submit=Procurar)

Set of news on UMinho Open Access projects website about the dissemination and activities of FOSTER Project: [http://openaccess.sdum.uminho.pt/?s=foster](http://openaccess.sdum.uminho.pt/?s=foster)


Sarah Jones: Fostering open science: Training for EC project officers on open access and open data in Horizon 2020, 7 July 2014, [http://www.dcc.ac.uk/blog/fostering-open-science#sthash.HRKIAjLF.dpuf](http://www.dcc.ac.uk/blog/fostering-open-science#sthash.HRKIAjLF.dpuf)


2.3 PROJECT MANAGEMENT DURING THE PERIOD

WP1 - MANAGEMENT

This WP is focused on the technical, financial and administrative management and coordination of activities and consortium partners, to achieve the main goals of the project.

The management structure consists of the Project Coordinator, the General Assembly (GA), the ultimate decision making body of FOSTER, composed by one representative of each partner, and the Project Steering Committee (PSC), that will coordinate, provide guidance and monitor the overall work of the project, composed by one representative of the Work Package leaders. Additional, an external Advisory Board, chaired by the Project Coordinator, will review and advise on the project work and progress twice during the project lifetime.

Some initial difficulties related with the start of the activities and the relation/coordination between them, have been mostly resolved after discussion on PSC meetings and on online Consortium Meeting.

The main achievements of the reporting period are:

- Realization of the Kick-off meeting, in Guimarães, in coordination with the PASTEUR4OA kick-off meeting
- Realization of the FOSTER General Assembly/Annual Meeting in Gottingen
- Establishment of the FOSTER Advisory Board

A summary of progress on the tasks of WP1 is provided below.

T1.1 Administrative Management

All the tasks related to legal, financial and administrative management of the project are being performed as indicated in the Grant Agreement. The partners received on time the pre-financing and the coordinator has been making the bridge between partners and the project officer regarding the schedule of the deliverables. UMinho provided administrative help to partners allowing them to deliver reports in time and with accurate information.

T1.2 Project Direction and Coordination

The project guidance is based on monthly online meetings with all members of the PSC and specific online meetings for the definition and development of specific tasks like the requirements of the Portal (D3.1), the FOSTER website (D5.1) or the Detailed Training Schedule (D4.1). The work package leaders also contribute with specific online meetings with the task responsible. The minutes of all the meetings are shared with the participants (PSC or General Assembly).

Even if the composition of the Advisory Board was discussed initially, and some contacts were made before the summer 2014, the establishment of the Advisory Board was delayed until early 2015. All the
relevant representatives from organizations/stakeholders identified by the PSC to be invited to the Advisory Board have accepted to participate on the AB. The FOSTER Advisory Board has the following constitution:

- John Smith – EUA – European University Association
- Georg Botz – Science Europe Open Access Working Group
- Maria Sánchez – EARMA – European Association of Research Managers and Administrators
- Ivo Neto – EURODOC - European Council of Doctoral Candidates and Junior Researchers

The review report from the Advisory Board is presented in Annex 1 the suggestions and recommendations from the Advisory Board will be considered in the future work of the project and further discussed on PSC meetings.

T1.3 Monitoring and Reporting

The monitoring has been performed based on the PSC regular meetings and other task specific meetings. The minutes of the consortium and presentational meetings are shared with the partners and the same methodology for PSC meetings. All the project documentation is shared with all partners through a shared Dropbox folder. The review of the Advisory Board will be considered in the future development of the project.

The Consortium developed a 6 month internal report to promote good practices in organizing project documentation and tasks description. For this progress report, all partners attend a presentation at the mid-term meeting in Gottingen to understand how to report the activity and the financial issues of the project. All the deliverables of the project until month 12 have been submitted on the participant portal.

T1.4 PROJECT MEETINGS

As defined on the project description, two face to face meetings where organized with all partners involved. The kick-off meeting of the project has been organized at Guimarães, Portugal, on 20 February 2014. To establish a common understanding of FOSTER and the project PASTEUR4OA, the kick-off meeting of the projects as been made in two separate days with one common session.

The annual meeting of the project has been organized by UGOE at Gottingen on 14 and 15 January 2015. This meeting was organized in three parts, the progress report of the first year, the discussion of current and future work and finally the lessons learned of the project.

The meeting of the PSC with the AB, initially planned to occur jointly with the General Assembly was rescheduled for May 2015 (jointly with a consortium workshop/meeting on eLearning).
Figure 12 - Mid-term Meeting at Gottingen – Germany
## 2.4. DELIVERABLES AND MILESTONES TABLES

### Deliverables (excluding the periodic and final reports)

<table>
<thead>
<tr>
<th>Del. no.</th>
<th>Deliverable name</th>
<th>Vers. WP no.</th>
<th>Lead beneficiary</th>
<th>Nature</th>
<th>Dissemination level</th>
<th>Delivery date from Annex I (project delivery date)</th>
<th>Actual / Forecast delivery date</th>
<th>Status</th>
<th>Comments</th>
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<tr>
<td>1</td>
<td>Progress Report</td>
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</table>
FOSTER: First Advisory Board Review
March 2015

Georg Botz, Science Europe Open Access Working Group

Ivo Neto, EURODOC - European Council of Doctoral Candidates and Junior Researchers

John Smith, EUA – European University Association

The two phases of this project seem to be feasible. All the activities planned for the first twelve months were concluded on time and in some cases with better results than initially expected. FOSTER is an ambitious project with a wide range of objectives. In particular, it has achieved and met successfully the challenge of a good response rate to its calls for proposals for its training events, and of selecting and mounting a full range of events with substantial total participation numbers. Also, in its first year the FOSTER project has worked hard in pro-actively contributing to the agenda of many relevant events organized by other stakeholders.

1- Overall assessment

Given that the focus of the first year activity was to provide the necessary project infrastructures with the mapping of existing content and some training activities, this has been achieved. The FOSTER’s website is highly informative and well-navigable but there is a lot of material which can be a little overwhelming at first access. It certainly though works towards the objective of bringing together the state of the art in the field – by offering a useful “one-stop-shopping” site for the research community as defined in the description of the project.

The special attention given to Early Stage Researchers (ESRs) is positive. There is still a lack of knowledge about strategies to fulfil the requirements of open research, and this project could be an important way to achieve this. Additionally, we believe that the possible impact on ESR’s careers could be stronger. ESRs are not always well integrated in research centres, making access to scientific material and also the options to publish their work harder.

A key finding emerging from the FOSTER events with universities was the general concern over the continued relative lack of institutional capacity in terms of expertise to take forward and implement valuable training tools and materials. The graduate school pilot clusters held in the first year brought back valuable feedback in this respect as an issue to be addressed. Thereby, the opportunity raised for ESRs to act as multipliers, disseminating knowledge to senior researchers and other stakeholders could assume an important impact on the State of the Art.

FOSTER is a project with a wide range of objectives. Its value lies in organizing the outputs and results in ways that are easy to access and take-up by the user. An interesting achievement in this respect during the first twelve months has been the development of the Open Science Taxonomy. This particular tool, working as a curating element, simplifies access to
important information and material gathered by different stakeholders. It is possible to highlight the cooperation and the input resulting from previous and current projects such as OpenAIRE and PASTEUR4OA. By doing this, FOSTER draws upon relevant and complementary knowledge and builds it into the learning processes.

The idea of integrating Open Science into the graduate curriculum, as it is explained in the task 2.2, is an interesting approach. It would be important to sensitize researchers towards openness during their whole research lifecycle.

The ambitious aim and scope of the project to both develop and promote an academic culture of “Open Science” in the medium-long term, and to meet the more short-term aims of helping to promote good practices and achieve the “take-up” of the new “Open Access” procedures of HORIZON 2020 have been balanced in the first year but may prove challenging to maintain in the second year.

2- Overall recommendations

FOSTER has Open Science in its name, but the activities described in the report are almost exclusively focused on Open Access to the final results in terms of publications and data. Open Science refers to openness throughout the research process, which starts well before the first experiments, encompasses detailed documentation of employed methodologies and includes previous phases such as funding proposals, data management or even the development of the first ideas.

It is during these first steps that ESRs may find more obstacles to develop their tasks in some particular situations, especially if they are not integrated into a research centre. Furthermore, even if the Horizon 2020 is already being executed, it is not entirely familiar to all the researchers starting a career. Thus, it would be important to have a brief description about the relation between OA and the policies and rules set out for Horizon 2020.

We agree with the recommendation to clean up content because of the duplication and quality issues. However, the conditions of how this step will be achieved remain unclear. It would be interesting to have a clear explanation of this task due to transparency of questions. In addition, it would be easier to find the most relevant training materials if selections could be applied, such as organizing documents by language.

FOSTER should continue to give priority to focusing its attention on doctoral candidates and young researchers as the key target groups for how the impact of the project can be best measured. We also consider that is necessary to foster the engagement of the next generation of scholars as agents for change in scholarly communication. Moreover, a greater visibility and impact of the FOSTER project with universities and research institutions should be a key focus in its second year with a view to the future take-up and sustainability of its output.

Wider dissemination of FOSTER training outputs and awareness of the FOSTER’s website needs to be achieved in the second year. We would also suggest the training proposals to be open. Not only the accepted ones, but also the proposals that were rejected. This would be an excellent training resource that could help recycling some of the ideas and improving the new proposals even more. Moreover, it would be easier to exceed the 1700 researchers reached during the first 17 training programmes.

Complementary work being undertaken by the EUA with its recent survey of university leadership measuring the level of awareness and the progress of open access policies (in relation specifically to scientific publications) at the institutional level can usefully draw attention to the training tools and good practices being developed in the FOSTER project. Further EUA surveys of its substantial university membership are planned on an annual basis from this autumn and awareness of FOSTER key output could be enhanced in future surveys – not least also as a means drawing the attention of university leadership to capacity-building investment required to sustain open access and benefit from it.

Finally, we recommend that the report itself be marked as openly licensed.