

Introduction to.... How to run an open licensing workshop?

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The purpose of this paper is to provide brief guidelines on delivering a workshop to support the agreement and adoption of Open Access approaches, and particularly the use of Creative Commons, for licensing digital content. It is based on our experience in conducting a similar workshop, jointly organized by the Institute of Development Studies (IDS) and Indira Gandhi Institute of Development Research (IGIDR) held over two days in Mumbai between March 12 and 13, 2015.

Introduction

Organizations, researchers and practitioners conduct research on various developmental issues across geographical locations. However, much of this, especially research emanating from outside of Europe and North America, does not get wider exposure owing to poor indexing in online search engines/databases, limited availability of such literature online in digital format and also due to copyright restrictions.

The [Open Knowledge](#) movement seeks to address these issues - making research available for everyone through open licensing of content, and increasing its discoverability in digital spaces online. However there are some persistent misconceptions about this movement among organizations and researchers and, in many cases, a lack of resources and technical capacity to engage effectively. The Open Knowledge Hub (OKhub) project aims to help organizations understand the merits of Open Knowledge approaches and support their capacity to engage effectively by sharing learning, capacity and resources.

This paper discusses planning, designing and conducting a workshop to address the specific challenges around adopting open licensing of bibliographic data on research publications highlighting the methods followed at IGIDR.

Planning the event

Workshop objectives

As a first step the organizers agreed on clear and specific objectives for the event. The objectives set at IGIDR's workshop were:

1. To create awareness about open licensing or 'Creative Commons License' among the stakeholders of Open Index Initiative (OII) and to make them stakeholders also in the OKhub project;
2. To reach agreement on an approach to licensing that would ensure metadata contribution to the OKhub by OII partners, for subject specific literature emanating from India in any document form, such as journal articles, working papers, theses and dissertations, conference papers, etc;

Selection of participants for the workshop

- **Selecting participants:** Participants for the workshop were selected based on the project objectives considering who could be the possible stakeholders or who would be likely to contribute.
- **Learning needs assessment:** To design the workshop content, an online survey was conducted before the workshop using the online tool '[SurveyMonkey](#)' to understand the participants' views and prior knowledge about Open Access and open licensing.
- **Call of experts:** It is advisable to identify and invite some Intellectual Property Right [IPR] expert(s), especially those specialized in open licensing with specific knowledge of the legal frameworks. Two legal experts were invited for IGIDR's workshop based on their association and experience in designing Open Access policy for government departments.

- **Funds:** The approximate travel and other expenses were estimated based on the participants identified and agreed upon well in advance.
- **Participants' presentations:** The main purpose of the presentations was to extend an opportunity to the participants to share information about their institutes' publication activities and the main challenges faced by them in disseminating these for wider use. This helped the organizers to assess participant's organization's research work and the problems faced by them in making their research visible to the outside world.

Designing the workshop programme/content

The workshop programme was set as per the objectives and based on the learning needs of participants identified from the survey. While designing the content, due emphasis was also put on considering the methods of delivery of the programme and also based on the requirements of the selected audience. It was suggested to have both presentations and group discussions to encourage participants to actively engage in the discussions and deliberations of the workshop. Some thought was given to what additional needs they might have such as opportunities to network with colleagues and share information about their own organizations and work. All the participants were asked to come prepared with few slides to present in the workshop to showcase their organization's research outputs, and to highlight the main challenges faced by them in making their research visible and usable.

Delivering the workshop

On the first day of the workshop at IGIDR the main focus was on introducing the Open Knowledge Hub (OKhub), the Open Index Initiative (OII), participants' presentations, open licensing and examples of few Open Knowledge projects. On day two, discussions were focused on attribution of metadata in OII and OKhub, discussion on partners' requirements, data contribution and technical issues of OII, data conversion and data standards, and MOU agreements. A range of participatory methods were used to capture and facilitate learning and collaboration including presentations, group discussions and demonstrations. This helped in participants' active engagement in the proceedings of the workshop.

Workshop sessions

The sessions of the workshop included the following:

- **Introduction to OKhub and OII:** This gave brief introduction to OKhub and the services offered by OII in order to make participants understand more about these projects, so that they could visualize the benefits they might derive if their institute's research is made available for wider audiences.
- **Discussion on participants' expectations:** Discussions were initiated to assess the participants' expectations from the workshop based on the online survey and the problems faced by them in making their institute's research visible. For this discussion, participants were divided into smaller groups to have a better understanding about their views and opinions with regard to Open Access and open licensing, and how they would persuade their institutes to adopt it. During the workshop, participants of both the groups expressed their desire to advocate Open Access and open licensing for their institutes' publications and also urged for IGIDR/OII to develop data standards for data exchange and to have a Memorandum of Understanding (MOU) signed by both IGIDR and their institutions for clearer understanding of terms and conditions for data sharing.
- **Open licensing of research documents and bibliographic information with examples:** This discussion was initiated to provide a brief overview of Open Access and open licensing including types of 'Creative Commons' licenses, benefits and their role in providing wider access and reuse of information with examples. It was suggested to have an IPR expert on the panel to talk on these aspects to have a greater clarity and its application in relation to local copyright law with some examples highlighting the open licensing adopted by any agencies or government in the region. Two legal experts who were invited for the talk on these topics gave a detailed account of Open Access to publications and data, existing open licensing policies, and how the authors and institutions could derive benefits from such policies. Examples of certain live projects (such as the OKhub) were used so that participants could understand the value of openness and its benefits and how it would help in wider use of research.

- **Expectations from the project coordinator:**
Discussion was held on the role to be played by the participants in getting their institutions' works released under open license, at least the bibliographic information up to abstract level. Participants were also briefed about how they could contribute data and the standards that might to be used for exchange of data. It was also suggested to seek their inputs for additional data fields to be added to the database to showcase these fields while displaying the records.
- **Agreements and discussion on MOU:** A Memorandum of Understanding (MOU) strengthens the bond between organizations and gives an official approval to undertake a shared activity as per the agreed terms and conditions. Therefore, it was suggested that a draft MOU may be put before the participants and legal experts to seek their suggestions before it was sent to their respective institutes for final approval.

Discussions were also held regarding the type of Creative Commons/ Open license to be adopted for the release of content; whether to be country specific or international. It was decided that the metadata up to the abstract level, as per India specific CCL, might be contributed by the participants. It was also suggested that it would be highly desirable to mention the type of [CCL, India 2.5 by-NC](#), in the MOU.

Feedback and following up

In the concluding session it is advisable to take feedback from participants to measure the success of the workshop. As a next step, it was suggested that the agreed drafted MOU would be circulated among the participants for their institutes' authorities to sign it, with or without modifications for sharing content under open licensing. A regular follow up was felt necessary to monitor the progress and to get the MOUs signed for sharing the metadata.

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Useful resources

IGIDR workshop report: <http://www.okhub.org/wp-content/uploads/2016/02/IGIDR-workshop-report.pdf>

MOU template developed at IGDIR workshop: <http://www.okhub.org/wp-content/uploads/2016/02/IGIDR-IDS-MOU-template.pdf>

MindTools, Planning a Workshop: <https://www.mindtools.com/pages/article/PlanningAWorkshop.htm>

WikiHow, How to prepare a workshop: <http://www.wikihow.com/Prepare-a-Workshop>

Creative Commons License: <http://creativecommons.org>

Open Knowledge learning paper: <http://opendocs.ids.ac.uk/opendocs/bitstream/handle/123456789/7122/GOKH%20Open%20Knowledge%20Final.pdf?sequence=1>

Licensing open content learning paper: <http://opendocs.ids.ac.uk/opendocs/bitstream/handle/123456789/7121/GOKH%20Licensing%20Final.pdf?sequence=1>

UNESCO Open Access Curriculum for library schools and researchers: <http://en.unesco.org/news/unesco-s-open-access-oa-curriculum-now-online>

IDS training slides on Understanding Open Licensing by Shahaam Shaikh (2013):

- Part 1 <http://www.slideshare.net/idsknowledgeservices/understanding-open-licensing-day-one-the-open-landscape>
- Part 2 <http://www.slideshare.net/idsknowledgeservices/understanding-open-licensing-day-two-introducing-creative-commons>
- Part 3 <http://www.slideshare.net/idsknowledgeservices/understanding-open-licensing-day-three-taking-steps-forward>

The Global Open Knowledge Hub project aims to improve the supply and accessibility of content that supports evidence-informed policy making and practice in international development. It builds on emerging approaches from the open access and open data movements to create a new open and collaborative “hub” for sharing of development knowledge whilst facilitating peer support and shared learning between project partners.

To find out more go to www.okhub.org

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