21-22 April 2023 OA Book Usage
Data Exchange and Use Guidelines and Principles Meeting

Location: OPERAS Office - Conference Room: Quai aux Briques 76, 1000 Brussels, Belgium

Meeting Objectives[1]

This working meeting will lead ~25 thought leaders to actively identify and develop an initial set of OA book usage data use policies and participation requirements for the OA Book Usage Data Trust. Participants will be asked to consider what is needed to ensure ethical data use and to foster trust among the diverse OA Book Usage Data Trust participants, including commercial and public usage data contributors and those who leverage the data exchanged through the OA Book Usage Data Trust's data space. Specifically, we will work to:

1. Define what's needed for trusted, ethical OA ebook usage data (OAEBU) exchange and use, such as:
    ○ data quality levels/requirements for data trust inclusion (*i.e.* standards, PIDs)
    ○ desired raw OAEBU data processing in the data trust, to provide for security, privacy, and data aggregation
    ○ allowable and prohibited uses of raw data accessed through the data trust

2. Identify any compliance mechanisms and "data usage policies" that are required to retain trust among data trust participants

3. Determine the minimum required technical, organizational, or legal requirements to participate in the data trust as as a usage data provider and usage data consumer

Draft language emerging from this workshop will be vetted through virtual consultations and conference feedback sessions with OA book stakeholders in the summer and fall of 2023. Resulting principles and policies will then provide the basis for data trust participation terms and data sharing agreements for the global OA Book Usage Data Trust.

Note: this is not a technical workshop - rather it focuses on principles and policy development to uncover the terms that public agencies and repositories, not-for-profits, and private enterprises will require to trust that the usage data they exchange through the OA Book Usage Data Trust's data space ecosystem is used in an ethical, non-harmful way that generates a public good.

Preparation and Reference Materials

- Pre-print: Improving OA Book Usage Data Quality and Assuring Ethical Data Use via Community Data Sharing Managed by an Industry Data Space (IDS).
- OA Books Supply Chain Mapping Report.
- IDSA Data Space Rulebook Guiding Principles section pdf excerpt,(source)
- OA eBook Usage Data Analytics and Reporting Use-cases by Stakeholder, pgs 3-4, 8, 14, 18, 26
- IDSA Data Space Rulebook Functional Requirements excerpt (Source).
- February 2023 OA Book Usage Data project update video
- 5-minute videos
- Our facilitator's "consensus tool"

Agenda

All times listed in local time

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[1] Objectives derived from data rulebook template recommendations for data ecosystems per IDSA Rule Book pg 53
https://internationaldataspaces.org/wp-content/uploads/dlm_uploads/IDSA-White-Paper-IDSA-Rule-Book.pdf

Day 1 | Friday, 21 April 2023

Note: Breakfast provided at the hotel for overnight guests

8:30	*Doors open* *OPERAS Offices - Quai aux Briques 76, 1000 Brussel*
9:00 - 10:00	Welcome, workshop purpose, definitions
10:30-10:45	Defining workshop success by exploring motivations, objectives, hard topics and helpful approaches
10:45 - 11:00	*Coffee, tea, and snack break*
11:00 - 12:15	Exploring collective usage data stewardship: benefits and trust
12:15 - 1:15PM	*Lunch break*
1:15 - 2:30PM	Exploring allowable and prohibited shared data reuse
2:30 - 2:40PM	*Coffee, tea, and snack break*
2:40 - 4:30PM	Exploring trust and compliance mechanisms
4:30 - 5:00PM	Day 1 closing & Day 2 preparation
5:00 - 7:00PM	Break - on your own
7:00 - 9:00PM	Group dinner - <u>Brasserie Surréaliste</u> Pl. du Nouveau Marché aux Grains 22-23, 1000 Brussel

Day 2 | Saturday, 22 April 2023

Note: Breakfast provided at the hotel for overnight guests

8:30	*Doors open - Networking, review work from yesterday* *OPERAS Offices - Quai aux Briques 76, 1000 Brussel*
9:00 - 10:45	Moving forward: identifying issues and next steps
10:45 - 11:00	*Coffee, tea, and snack break*
11:00 - 11:45	Data Trust governance mechanisms
11:45 - 1:00PM	Next steps and closing over group lunch

Participants

Professional Facilitator | [Barbara Grant of Crux Consulting Consortium](US)

Potential OAEBU Data Creator/Consumers	1. [IRUS-UK](#)** | Jo Lambert*^ (UK) 2. [JSTOR](#)** | John Lenahan (US) 3. [EBSCO](#)** | Jon Elwell* (US) 4. [Springer Nature](#)** | Björn Johansson (UK) 5. [OAPEN](#)** | Niels Stern^ (NL) 6. [Wits University Press](#) | Andrew Joseph (ZA) 7. [Taylor and Francis](#) | James Watson (UK) 8. [Berghahn Books](#) | Vivian Berghahn^ (UK) 9. [Open Edition](#) | Pierre Mounier (FR)
Potential OAEBU DT Data Consumers	10. [Book Analytics Dashboard](#) Project & [Curtin Open Knowledge Initiative](#) | Cameron Neylon (AUS) 11. [TOME Initiative](#), Virginia Tech Publishing | Peter Potter (US)
OAEBU DT Staff *May assist with small group facilitation*	12. [OAEBU DT](#) Executive Director | Christina Drummond*^^ (US) 13. [OAEBU DT](#) Community Manager | Ursula Rabar^^ (CH)
OAEBU Data Ecosystem & Open Infrastructure	[Directory of Open Access Books (DOAB)](#) *(part of OAPEN, represented by Niels Stern and Pierre Mournier who are noted above)* 14. [OpenAIRE Usage Counts Service](#) | Dimitris Pierrakos* (GR) 15. Jennifer Kemp* (US) | formerly of [Crossref](#) 16. [OpenAIRE](#) | Prodromos Tsiavos^^ (GR)
OAEBU Data Related Standards	17. [COUNTER](#) | Tasha Mellins-Cohen (UK)^*
Stakeholder Consortia	18. [Lyrasis](#) | Sharla Lair* (US) 19. [Book Industry Study Group (BISG)](#) | Brian O'Leary (US)^ 20. [LIBER Open Access Working Group](#) | Sofie Wennström (Sweden) 21. [OPERAS](#) | Yannick Legré^^ (BE)
Funding Organizations	22. [Coalition S](#) | Johan Rooryck (BE)

*   Denotes OAeBU Data Trust Trustee
**   Denotes piloted data source in 2020-2021 OAEBU dashboard pilots
^   Denotes OAEBU DT Governance Building Blocks Project Advisory Board Member
^^   Denotes OAEUB DT Governance Building Blocks Project Team Member