



European
Commission

RESEARCH & INNOVATION

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Open access

Data management

Open access & Data management

These pages guide you through

- the context and Horizon 2020 rules on **open access to scientific publications**, which is an *obligation*, and
- open access to research data**, where opt-outs are possible, and **research data management**

Detailed guidance for both aspects is available through the buttons on top of the page and the pdf reference documents bellow.

What Is Open Access (OA)?

Open access can be defined as the practice of **providing on-line access to scientific information that is free of charge to the reader**. In the context of R&D, open access typically focuses on access to '*scientific information*' or '*research results*', which refers to two main categories:

- Peer-reviewed scientific research articles** (primarily published in academic journals)
- Research data**

More details about Horizon 2020 provisions for open access to publications and data is given below.

OPEN ACCESS TO PUBLICATIONS

- Get prepared
- Electronic proposal submission
- 📁 From evaluation to grant signature
 - Admissibility and eligibility check
 - 📁 Evaluation of proposals
 - Evaluation criteria
 - Evaluation process and results
 - 📁 Grant preparation
 - Enter & submit grant data
 - Ethics review
 - Security scrutiny
 - Grant signature
- 📁 Grant management
 - Keeping records
 - Amendments
 - 📁 Reports & payment requests
 - Continuous report
 - Periodic reports
 - Final report
 - Deliverables
 - Dissemination & exploitation of results
 - Communicating your project
 - Acknowledgement of EU funding
 - Checks, audits, reviews & investigations
- Financial instruments
- Prizes
- 📁 Working as an expert
 - Expert registration
 - Contracting & payment
 - Expert roles & tasks
- 📁 Cross-cutting issues

Under Horizon 2020, each **beneficiary must ensure open access to all peer-reviewed scientific publications relating to its results.**

Beneficiaries can freely choose between the most appropriate route towards open access for them:

- **Self-archiving** (also referred to as '**green**' open access) means that a published article or the final peer-reviewed manuscript is archived (deposited) in an online repository before, alongside or after its publication. Repository software usually allows authors to delay access to the article ('embargo period') If this route is chosen beneficiaries must ensure open access to the publication within a maximum of six months (twelve months for publications in the social sciences and humanities).
- **Open access publishing** (also referred to as '**gold**' open access) means that an article is immediately provided in open access mode (on the publisher/journal website). Publishers sometimes charge so called Article Processing Charges (or APCs) to make articles open. Such **costs are eligible for reimbursement during the duration of the project** as part of the overall project budget. Furthermore, the EU funded pilot project **OpenAIRE** (Open Access Infrastructure for Research in Europe) provides support for open access costs incurred after the end of the grant [for FP7 projects](#). In the case of gold open access publishing, open access must be granted *at the latest on the date of publication* and you also have to deposit a copy in a repository.

See more details in the [Open access](#) sub-section.

OPEN ACCESS TO RESEARCH DATA

Research data is information (particularly facts or numbers) collected to be examined and considered, and to serve as a basis for reasoning, discussion or calculation.

Open access to research data - the right to access and reuse digital research data under the terms and conditions set out in the Grant Agreement.

Horizon 2020 Open Research Data Pilot and Data Management Plan

In Horizon 2020 the Commission has launched a **flexible pilot for open access to research data (ORD pilot)**. The pilot **aims to improve and maximise access to and re-use of research data generated by Horizon 2020 projects**, taking into account

- the need to balance openness and protection of scientific information
- commercialisation and IPR
- privacy concerns
- security

- › International cooperation
- › Social Sciences & Humanities
- › **Open access & Data management**
 - › Open access
 - › Data management
- › Climate action & sustainable development
- › Ethics
- › Gender
- › SMEs
- › ERA-NETs
- › Links to regional policy
- › Intellectual property
- › Innovation procurement

- data management and preservation questions

Scope of the pilot

- In previous Work Programmes the ORD Pilot was limited to some areas of Horizon 2020.
- As of the Work Programme 2017 the [Open Research Data pilot is extended to cover all thematic areas of Horizon 2020 per default](#). However, the Commission recognizes that some research data cannot be made open and applies the principle of '**as open as possible, as closed as necessary**'. It is therefore possible to opt out of research data sharing at any stage - before or after the signature of the grant agreement - but reasons have to be given e.g. for intellectual property rights (IPR) concerns, privacy/data protection concerns, national security concern, if it would run against the main objective of the project or for other legitimate reasons (see [General Annex L](#) of the 2017 Work Programme adopted at 25 July 2016).

Data set

The Open Research Data Pilot applies primarily to the data needed to validate the results presented in scientific publications. Other data can also be provided by the beneficiaries on a voluntary basis.

Data Management Plan

Participating projects will be required to develop a Data Management Plan (DMP), in which they will **specify what data will be open**: detailing what data the project will generate, whether and how it will be exploited or made accessible for verification and re-use, and how it will be curated and preserved.

Costs associated with open access to research data, including the creation of the data management plan, can be claimed as eligible costs of any Horizon 2020 grant.

See more details in the [Data management](#) sub-section.

Reference documents

- [Guidelines to rules on Open Access to Scientific Publications & Open Access to Research Data in Horizon 2020](#)
- [Guidelines on the Implementation of Open Access to Scientific Publications & Research Data in projects supported by the European Research Council under Horizon 2020](#)
- [Guidelines on Data Management in Horizon 2020](#)
- [Template for the Data Management Plan \[ODT format\]](#)
- [Template for the Data Management Plan. Annotated version for participants under Societal Challenge 1](#)
- [ERC template for the Data Management Plan \[ODT format\]](#)

- [Scope of pilot indicated in the introduction to the Horizon 2020 Work Programme](#)
- [H2020 Annotated Model Grant Agreement - Open access to scientific publications](#)
- [H2020 Annotated Model Grant Agreement - Open access to research data](#)

Related links

- [European Commission Open Access Policy \(Open Science\)](#)
- [OpenAIRE - Open Access Infrastructure for Research in Europe](#)
- [European IPR Helpdesk factsheet "Publishing vs. patenting"](#)

FAQ

- [FAQs on open access to scientific publications](#)
- [FAQs on research data management and open research data](#)