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D.5.1 User strategy and access policies

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Executive Summary

The present deliverable is about the E-RIHS strategy and policies to enable users' access to its physical and virtual research facilities.

The first section of the present document describes the user access policy for the four E-RIHS platforms: E-RIHS ARCHLAB, E-RIHS DIGILAB, E-RIHS FIXLAB and E-RIHS MOLAB. The second section outlines the stages of the selection procedures.

The access policy includes different modes according to the physical or virtual nature of the facilities involved. The first one deals with the access to physical platforms such as E-RIHS ARCHLAB, E-RIHS FIXLAB and E-RIHS MOLAB. In this case access is "Excellence-driven", i.e. it is based on the scientific quality of the access project proposed by the user and its feasibility.

The second one, "Wide access" concerns online access to digital tools and digital heritage research resources accessible via E-RIHS DIGILAB. Such strategies will also include long-term projects and their access modalities.

The selection procedure for Excellence-driven access envisages an E-RIHS ERIC peer reviewing process conducted by external experts. A local technical committee assesses the overall feasibility of the research proposal.

The policies reported here comply with the relevant charters on the matter.

The present deliverable is the result of joint work of the Task leader together with the sub-task leaders for E-RIHS ARCHLAB, E-RIHS DIGILAB, E-RIHS FIXLAB and E-RIHS MOLAB, with contributions by the WP5 leader and the leaders of other tasks/WPs with a scope affecting access provision and the platform coordinators.

DISCLAIMER:

This document reflects the state of advancement of the preparatory work at the time of its delivery. As such, its content may be subject to further evolution.

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Abstract (for dissemination)	This deliverable describes the main features of the future E-RIHS ERIC access policies and access procedures. This includes the types of access E-RIHS provides, the different platforms and the access modalities. It also addresses the involvement of users and their rights and duties related to E-RIHS access.
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Glossary and abbreviations

Access Policy	Policy to operate and manage integrated, distributed or virtual access platforms in E-RIHS
CCO	No Copyright (Public domain) license. It is the license adopted by Europeana for metadata. For further details, see [1].
CC	Creative Commons licenses. They are a suite of licenses that enable the free distribution of an otherwise copyrighted work.
Central Hub	The Central Office managing E-RIHS.
ECfARI	European Charter for Access in Research Infrastructure, see [2].
EOSC	European Open Science Cloud, see [3].
E-RIHS	European Research Infrastructure for Heritage Science.
E-RIHS ARCHLAB	E-RIHS access platform to collections and archives, sometimes shortened to ARCHLAB.
E-RIHS DIGILAB	E-RIHS access platform to digital data, sometimes shortened to DIGILAB.
E-RIHS FIXLAB	E-RIHS access platform to large- and medium-scale facilities, sometimes shortened to FIXLAB.
E-RIHS MOLAB	E-RIHS access platform to a comprehensive set of mobile instrumentation, sometimes shortened to MOLAB.
ESFRI	European Strategy Forum for Research Infrastructures.
FAIR	(Findable, Accessible, Interoperable, Reusable) A set of guidelines to improve the findability, accessibility, interoperability, and reuse of digital assets. For further details see [4].
Help Desk	An E-RIHS office or team supporting users in the submission of access proposals.
IPERION CH	Integrated Platform for European Research Infrastructures on Cultural Heritage, an H2020 Integrating Activity Project.
LTC	Local Technical Committee, involved in feasibility assessment.
Monument	A building, structure, or site that is of historical importance or interest.
PRP	Peer Review Panel, involved in proposal evaluation

Introduction

This document describes how E-RIHS ERIC aims to deliver access through its four platforms: “E-RIHS ARCHLAB”, “E-RIHS DIGILAB”, “E-RIHS FIXLAB” and “E-RIHS MOLAB”. The document has been drafted by a core team, selected on the basis of their experience in providing European access through previous European Integrating Activities such as IPERION CH (H2020) and CHARISMA (FP7), in tight collaboration with colleagues from WP2 on aspects related to the governance structure of E-RIHS, from WP3 for the financial and managerial aspects of the E-RIHS access offer, from WP4 for the legal and procedural aspects, and from WP9 for the scientific priorities. It has also been reviewed by the E-RIHS platform coordinators.

The access policies and access procedures have been discussed within the wide E-RIHS community on several occasions during E-RIHS meetings as well as with experts from other research infrastructures, such as CERIC ERIC. They were designed in accordance with the European Charter for Access to Research Infrastructures [2] and taking into account the ESFRI recommendations on the E-RIHS Preparatory Phase (accepted) proposal for inclusion into the 2016 roadmap [5]. Yet, some specific issues related to the field of interest, Heritage Science, required additional reasoning to be thoroughly addressed in a comprehensive E-RIHS ERIC access policy.

This deliverable is focused in two main parts serving different purposes. The first part, “E-RIHS Access Policy”, is designed to provide answers to a broad audience about the principles that will drive E-RIHS accesses. This part will be particularly useful to explain the plan to the user community, stakeholders, policy makers, facility directors and potential E-RIHS providers who are considering to become involved in E-RIHS. Definitions and explanations of key terms, core values and different modes and types of access are also included in this first parts.

The second part of the document, “E-RIHS Access Procedure”, aims at defining how, to whom, and to what kind of proposed project access could be granted. This part is less detailed than the former one, mostly as it is heavily dependent on the ongoing work on governance, legal, financial, and managerial aspects of E-RIHS. However, it still provides a solid foundation for access policies and a user strategy that will be further detailed according to the final E-RIHS global strategy.

Revision of the present document

The present document depends on a number of decisions to be taken at management level in the development of E-RIHS, which may influence the future effectiveness of the access policy described here. It is therefore assumed that it will be revised thoroughly:

- after testing its implementation, to fine tune the effectiveness of the policies,
- when new decisions are taken affecting access, even indirectly, which may require adapting the policy to the new situation.

Examples of such situations are given below.

- Long-term scientific projects which are crucial for the implementation of the E-RIHS scientific vision. If the present rules will turn out not to be completely satisfactory for long-term scientific projects, as resulting from the “E-RIHS scientific strategy v.1.0” (D9.3), they will be updated.
- E-RIHS DIGILAB implementation. While the design of the E-RIHS DIGILAB has been outlined in the Scientific Vision document already approved within the project (D9.1), its practical implementation needs further decisions and the allocation of resources. The present description of the DIGILAB access policy is based on preliminary high-level design, which still requires detailing and an implementation plan with allocated resources. The present policy is based on stable requirements of the EU Commission, such as the Open Access EU strategy [6], the EOSC [3] and the implementation of the FAIR principles [7], and in compliance with good practices, such as those adopted for example by DANS-KNAW [8]. Therefore, it is anticipated that E-RIHS DIGILAB implementation will need to comply with such general policies and this proposal will still be valid.

E-RIHS Access Policy

Access to E-RIHS platforms aims at conducting innovative research and development, at improving the related methods, and at fostering collaboration in the Heritage Science field.

Access platforms involved in E-RIHS

“Access platforms” include facilities, resources and services that are used by the research community to conduct research and foster innovation in the field of Heritage Science.

They include major scientific equipment (or sets of instruments), knowledge-based resources, such as collections, archives and scientific data, e-infrastructures, computing systems and communication networks, and any other tools that are essential to achieve excellence in research and innovation. They also include the human expertise and know-how of the E-RIHS teams operating each of the access platforms.

Access is offered by the E-RIHS partners to E-RIHS ERIC as in-kind contributions. This means that the access platforms will provide access to answer research questions pertaining to the entire scope of Heritage Science as long as they stay within the legal and statutory boundaries of the providers.

E-RIHS will offer research services and the associated expertise of the staff through four access platforms:

- (i) E-RIHS ARCHLAB: access to physical and local digital collections that constitute valuable research resources, such as objects, technical images, samples and reference materials, analytical data and conservation documents, as stored in museums, galleries, conservation and research institutions
- (ii) E-RIHS DIGILAB: online access to digital tools and digital heritage research resources, with the aim to make heritage science data FAIR (Findable, Accessible, Interoperable and Re-usable). This includes and enables access to searchable registries of datasets, reference collections, thesauri, ontologies, and supports data interoperability through the creation of shared knowledge organization systems
- (iii) E-RIHS FIXLAB: facilities established in a fixed location, e.g. particle accelerators, neutron and laser sources and other essentially immovable research facilities;
- (iv) E-RIHS MOLAB: access to a comprehensive selection of mobile instrumentation for non-invasive measurements and documentation on objects, buildings, and sites, allowing in situ investigation in the frame of multi-technique diagnostic projects, including the associated unique skills and expertise of the staff in the application of these techniques

Users of E-RIHS

Users can be individuals and teams from academic institutions, research centers, industry or other private and public institutions involved in Heritage Science. They are actors in the conception or creation of new knowledge, products, processes, methods and systems or in project management. Teams of users can include researchers, technical staff and students undertaking research in the framework of their studies. According to its scientific strategy, E-RIHS will encourage applications from users’ teams with a strong multidisciplinary character.

Access

“Access” refers to the legitimate and authorized physical, remote and virtual admission to, interactions with and use of E-RIHS platforms and to the related offered services. It encompasses machine time, computing

resources, software, data, data-communication services, sample preparation, archives and collections consultation, the set-up and execution of experiments, analytical services and expert support.

This definition does not include the transportation of the users and of any item that they may carry with them, such as own instruments, artefacts, samples, etc.

Scientific excellence is the core principle of this access policy, but it is not meant to preclude some level of differentiation between European and international users, especially when it comes to the attribution of travel and accommodation grants. In order to maintain a certain ratio of European users, the access policy might include quotas of non-European users teams.

E-RIHS ERIC pledges to provide access with no access or submission fee. As a general rule, E-RIHS ERIC access should remain as free as possible, but it does not mean that no costs will be borne by the users. In particular, users' costs may include travel and accommodation fees, as well as insurance costs for the artefacts.

The E-RIHS access policy will also provide a common framework for accounting for the access provision. This framework will include the definition of common access units and KPIs, including a comprehensive way to measure the impact of E-RIHS. These benchmarks provide a unified way to count the users and to assess the access offer in order to provide to the scientific community the best service possible, from the single entry point to the availability of the data.

Access Mode

Access to the four E-RIHS platforms will be provided according to different modes: an *Excellence-driven access* mode for the physical platforms (E-RIHS ARCHLAB, E-RIHS FIXLAB and E-RIHS MOLAB), a *Wide access* mode for digital activities on E-RIHS DIGILAB. The possibility of a *Market-driven access* mode in accordance with the planning of E-RIHS ERIC commercial activities, may be also considered, according to the global E-RIHS strategies to be developed by the project.

Excellence-driven access is exclusively dependent on scientific excellence, the quality of an application evaluated through a peer reviewing process conducted by external experts. The feasibility of the research proposal is assessed by the facility Local Technical Committee (LTC).

Wide access promotes a broad digital access to scientific data and digital services provided by E-RIHS DIGILAB to users wherever they are based and following the FAIR and Open Access principles: "as open as possible, as closed as necessary".

Market-Driven access is defined through a commercial contract between the user and the provider in accordance with the E-RIHS ERIC rules of procedures for commercial activities, to be further elaborated in the future. Because of the statutory nature of E-RIHS ERIC, this access mode will remain limited both in volume and in numbers, if the E-RIHS General Assembly allows market-driven accesses.

Excellence-driven access (E-RIHS ARCHLAB, E-RIHS FIXLAB and E-RIHS MOLAB)

E-RIHS will only grant access to scientific projects falling within the E-RIHS scope, as described in its Scientific Strategy. Excellence-driven access must not in any case amount to a commercial authentication service.

Access is free of charge and not restricted to members or observers of E-RIHS ERIC. Scientists from E-RIHS partner institutions will not be granted unfair advantages in the scientific selection process or in the attribution of travel and accommodation grants. However, E-RIHS ERIC may grant practical advantages to its members at some point during the access process.

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E-RIHS ERIC will enable multi-platforms and long-term projects. Long-term projects will allow users to access multiple facilities in a time span of several years. In order to carry out long-term projects, users will have to apply for an E-RIHS certificate through the normal access selection procedure. The E-RIHS PRP will then perform an extensive evaluation of the project during the first call, and regular assessments will be carried out along the duration of the long-term projects. E-RIHS national coordinators may announce yearly the ratio of long-term projects of their Access providers to the E-RIHS Head Office.

E-RIHS users will only undertake research concerning publicly owned cultural and scientific collections, artefacts, objects, samples, monuments¹ or sites. However, E-RIHS can accept projects involving privately owned items (i.e. collection, artefact, object, sample or monument), when:

- the item is listed as being of relevance at the international, national or regional level and is accessible to the public; or,
- the item is privately owned but deposited in a public institution; or,
- the item is privately owned but it is an essential element of a publicly-owned corpus of items.

Wide access (E-RIHS DIGILAB)

E-RIHS supports an Open Access policy to data. However, access limitations may be necessary for copyright reasons, personal and privacy-sensitive data protection, and to protect legitimate Intellectual Property Rights (IPR). E-RIHS abides by the DARIAH Heritage Data Re-Use Charter [9].

All scientific data will be stored and curated at “local” repositories under the responsibility of a partner or a cooperating institution, with possible exceptions for a small number of reference datasets, such as vocabularies, reference tables, manuals, etc. which may be stored with the E-RIHS DIGILAB Catalogue to facilitate searches or to support the DIGILAB use.

E-RIHS partners provide data access at the conditions specified below and share the metadata for their datasets to the E-RIHS DIGILAB Catalogue according to a common data model.

Access to tools and services is provided through the main portal of E-RIHS DIGILAB. E-RIHS DIGILAB will favour free and open source digital tools and services. However, there could also be some paid tools and services if they provide a significant added value to the platform, and assuming that they comply with the E-RIHS ERIC ethics and values and with the limits on commercial activities laid down by the ERIC regulation. Access to data is provided through the E-RIHS DIGILAB Catalogue, which enables searching the metadata and finding datasets stored in “local” repositories.

The E-RIHS DIGILAB Authentication, Identification and Authorization System will provide a federated identity system to all participating data managers and to all the categories of users. User access will be regulated with different level of privileges, with a system of Registered Users Datasets.

Conditions for data re-use must be specified in each dataset metadata. Such conditions may refer to general licensing schemes (e.g. Creative Commons) or to specific re-use conditions established by the data owner/depositor as well as by legal constraints, e.g. a non-transferable use license. A “re-use document” summarizing legal re-use constraints should be available in each participating repository and referenced in each dataset.

¹ See the Glossary for the definition of the term “monument” as used here.

E-RIHS Access procedure

Access to E-RIHS platforms could be provided according to the three different modes as aforementioned: an Excellence-driven access mode for the three physical platforms (E-RIHS ARCHLAB, E-RIHS FIXLAB and E-RIHS MOLAB), a Wide access mode for digital activities on E-RIHS DIGILAB, and a Market-driven access mode in accordance with the provisions for E-RIHS ERIC commercial activities and with the restriction on commercial activities imposed by the ERIC regulation. Only the first two modes will be described here.

Access to E-RIHS platforms rely on in-kind contributions from E-RIHS partners. This means that the access platforms will provide access to answer research questions pertaining to the entire scope of Heritage Science as long as they stay within the legal and statutory boundaries of the providers.

Potential users may contact the E-RIHS Helpdesk. This Helpdesk will inform the users on the admissibility of their project and assist them in the preparation of their proposal. The key feature of this preliminary support will be to offer a contact with the potential access providers to facilitate the preparation of proposals for access. A prospective user will be able to contact the E-RIHS helpdesk in order to be redirected to the relevant E-RIHS partners that could help them to answer their research questions. For example In the case of synchrotron facilities, the person will be encouraged to contact a relevant beam line scientist and ask them any questions they may have on the access offer.

A single entry point

A single digital entry point for access to the four platforms will be managed by the Central Hub. E-RIHS will set up a Help Desk which will intervene in the various steps of proposal submission, helping users in the proposal compilation and directing them to the most appropriate platform/facility.

Excellence-driven access (E-RIHS ARCHLAB, E-RIHS FIXLAB and E-RIHS MOLAB)

E-RIHS users will typically request an access to an E-RIHS facility by submitting a proposal that involves several researchers or Heritage Stakeholders from various fields and institutions, but single users can also apply. In both cases, one person will be responsible for the administrative contact with E-RIHS: the User Group Leader.

User Group Leaders will be requested to fill out a specific application form to apply for E-RIHS access. Applications may be submitted in reply to calls regularly issued by E-RIHS, or open calls for some resources. Each call will include a selection of providers offering access. If the User Group assumes that several providers are granting comparable accesses, the Group Leader is free to select one or more options that are most appropriate to their project and, if applicable, provide the Central Hub with an order of preference.

Users will be encouraged to use the CC0 Public domain mark by default. However, they will also be given the choice to select one of the Creative Commons licenses. This suite of licenses offers 6 possibilities that can accommodate most of the users' needs while abiding by the E-RIHS values. This part of the application will also lay down the rules on the transfer of the project data to E-RIHS DIGILAB (when applicable).

Each Excellence-driven access proposal will be evaluated following the procedure as schematized in the flowchart below. This procedure will consist in an administrative eligibility check of the proposal by the Central Hub (not shown in the diagram) and a feasibility assessment of the proposal followed by a scientific evaluation. The latter steps respectively involve a Local Technical Committee (LTC) and a Peer Review Panel (PRP), as explained below.

These steps are executed as follows:

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Step 0: Administrative eligibility of the proposal by the Central Hub

The Central Hub confirms whether the eligibility criteria that derive from Excellence-driven access are met. It can reject proposals at this point if science is not the core motivation of the proposal. A non-eligible proposal would be, for example, a project where the “scientific content” is only related to concealing an authentication request.

This step is preliminary to evaluation and for the sake of clarity it is not shown in the chart.

Step 1: Feasibility of the proposal

The assessment of feasibility of a proposal is carried out at the provider level by a Local Technical Committee (LTC) according to common predefined criteria. This committee can take several forms and its composition may vary according to the nature of the proposal:

- personnel in charge of the access for archives, mobile and fixed instruments,
- existing local help desks for large-scale instruments.
- LTC members cannot evaluate proposals in which they have a conflict of interest.

The assessment of the overall feasibility of a proposal will result in a Yes/No report by the LTC, followed by detailed comments explaining their decision. This decision can be eliminatory if the technique is not appropriate to answer the research question, the archives do not exist or are not accessible, or any other reason that makes the proposal irrelevant. In such a case, the Central Hub will reject the proposal as it is, upon recommendation by the LTC, without sending it to the PRP for the scientific evaluation. These commentaries will be used to justify the refusal to the User Group Leader.

The provider can also suggest another provider for technical reasons or skills and know-how. A complement of the proposed study with other techniques can also be recommended at this step.

If a long-term project needs several accesses, the proposal must justify such a request.

If the project requires different types of instruments or archives for an access that would be granted by several providers, each concerned provider will perform an overall feasibility local assessment.

Step 2: Scientific evaluation

The Scientific Evaluation of access proposals for all types of physical access will be carried out by a unique multi-disciplinary international Peer Review Panel (PRP). A pool of renowned international experts, covering a wide range of knowledge and expertise within the field of Heritage Science will be nominated by E-RIHS for the review of proposals.

Because of the very large number of proposal, the E-RIHS PRP will be organized in several groups, so that each proposal is not evaluated by the entire pool of expert. A core Peer Review Panel will evaluate the general scientific excellence of the projects, while subgroups will evaluate platform or subgroup specific criteria.

Peer Reviewers will be selected among the pool of referees, avoiding any conflict of interest. The core Peer Review Panel members will fill out a predefined selection grid according to the general selection criteria to be validated by the general assembly. Each platform or platform subgroup will establish their platform specific criteria, which might be adapted to the exploratory or long-term nature of the projects, to the relevant heritage conservation criteria, and to the adequacy of the requested technique.

The “evaluation criteria” of the E-RIHS Access meeting held at the C2RMF in Paris on 22nd October 2019 suggested the following general selection criteria:

The general evaluation assesses the relevance of the project to Heritage Science, as well as the general scientific excellence, the ethics of the project, the data management plan and the planned dissemination activities. Each platform or sub group of platform can also define sub-criteria, provided that they are compatible with the general evaluation criteria.

The following are tentative breakdowns of scientific excellence, cross-disciplinary and ethics:

Scientific excellence:

- *Originality / news value*
- *State of art*
- *Previous results, legacy, former publications*
- *Potential scientific expansion of the Project*
- *Excellence of the proposal*

Cross-disciplinary:

- *Proposal*
- *Team background*

Ethical criteria:

- *Assessment*
- *Engagement (society)*

Some criteria can only be assessed by reviewers with a direct knowledge of the precise field of the proposal and of the techniques required. They include:

- *The assessment of the literature review*
- *The necessity to use this particular technique*
- *The Industrial outreach and impact (broadly speaking)*
- *The early contacts with the helpdesk or the potential providers (if applicable)*

Step 3: Ranking of proposals

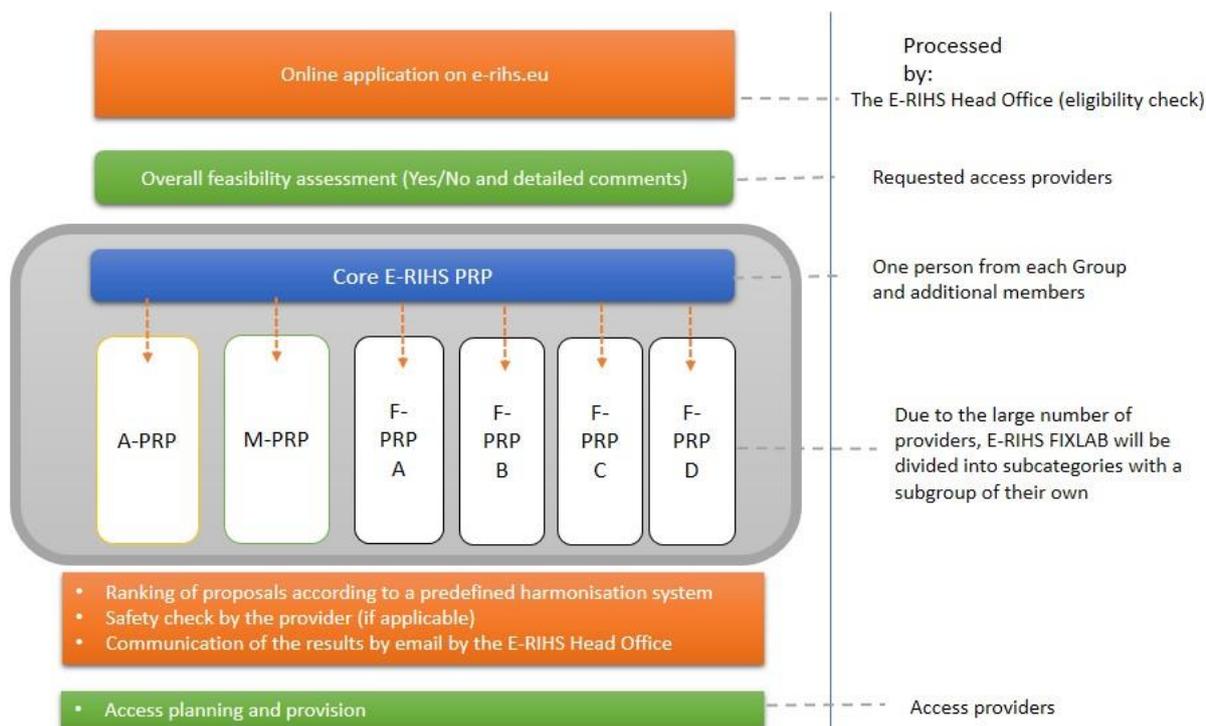
The final mark is given by the PRP. Proposals are ranked from the highest mark to the lowest. The Central Hub then grants the access to the highest scoring projects as long as the requested access slot is available. If it is not, users can be redirected by the Central Hub to their second choice, and the evaluation process is restarted. Users can choose to resubmit for the next call in case of a fixed timetable.

Step 4: Final step

The Central Hub officially announces to the providers whether the proposals in which they were requested are accepted or not, but it does not plan the runs. Providers then perform final safety checks according to their own legal and internal regulations. These regulations are available online and will be compiled and explained by E-RIHS.

If a proposal is cleared, the User Group Leader will be invited by the Central Hub to timely contact the provider to schedule and organize the access. If the proposal is not cleared, the User Group Leader will receive a justification by the Central Hub.

After the access, Users Group Leaders are required to send back a satisfaction form to the Central Hub, and to communicate any related access related publication or dissemination action that they may undertake. Users are also required to duly acknowledge the role of E-RIHS in the access provision.



E-RIHS access: proposal flowchart

Wide access (E-RIHS DIGILAB)

User access regulation

User access is regulated as follows:

- Anonymous E-RIHS DIGILAB users may only access the Catalogue and Open Access datasets;
- Registered users can access Open Access Datasets, Open Access to Registered Users Datasets and Datasets with Restricted-Access Data with the exclusion of the restricted-access data.

The procedures to obtain special access permissions to restricted data or dataset may vary, but they will be explained to users trying to access them.

The E-RIHS DIGILAB Authentication, Identification and Authorization System provides a federated identity system to all participating data managers and to all the categories of users.

Data re-use

Conditions for data re-use must be specified in each dataset metadata. Such conditions may refer to general licensing schemes (e.g. Creative Commons) or to specific re-use conditions established by the data owner/depositor as well as by legal constraints, e.g. a non-transferable use license.

A “re-use document” summarizing legal re-use constraints should be available in each participating repository and referenced in each dataset.

Access and use of digital tools and services

E-RIHS will provide a number of digital services through its E-RIHS DIGILAB. Such services include, for example, visualization tools, data processing, statistical tools, data mining and so on.

Some of these services will need to store data, and some will not. This distinction will have an impact on the accessibility of E-RIHS DIGILAB services:

- Services not requiring data storage will be available to anonymous and registered users with a simplified procedure related to the service such as making the results available for instantaneous download or sending the processed results by email.

- Services that need data storage will only be available to registered users. The detailed policy on the access to such services will be elaborated and updated at the level of E-RIHS ERIC.
E-RIHS DIGILAB will favour free and open source digital tools and services. However, there could also be some paid tools and services if they provide a significant added value to the platform, and provided that they comply with the E-RIHS ERIC ethics and values and with the limits on commercial activities laid down by the ERIC regulation.

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