WP2 PROGRESS REPORT

Date: 08/10/2021

Period covered: M19-M26

T2.1	Alignment of policies (PSI)
Progress:	The formal consultations with the facility staff in charge of data policies were carried out between February and May 2021 with each ExPaNDS partner facility. They led to the publication of the final data policy framework of the project in August 2021. Our work on the FAIRification of data policies was featured by the FAIRsFAIR project as the first of its adoption stories.
Next steps:	Final steps on this task will be to: - publish the supplementary document with the full write-up of the consultations in the project's SharePoint, - update and publish the standalone document summarising the key elements of a PaN national RI's data policy. The impact on the individual data policies at our facilities will be assessed as part of the final report on outreach activities (task 2.6).

T2.2	Data management planning and DMP (HZB)
Progress:	The DMP template developed by PaNOSC, with important contributions from ExPaNDS, is now being finalised (due by the end of November 2021). As a complement, ExPaNDS is working on providing an analysis of when during the experimental lifecycle the information required to answer the template questions becomes available and where that information comes from, e.g. from the proposal system, from the instruments, directly from the user, etc. This analysis is linked to the experimental lifecycle metadata analysis that was carried out in the frame of task 2.3. The associated deliverable is being finalised and is due by the end of November.
Next steps:	For the second phase of this task and in view of the final "active" DMP deliverable, we will focus on use cases that demonstrate the integration of data management planning practices in the experimental process at the instrument level.

T2.3	Mainstreaming of standards for data management (ALBA)
Progress:	The draft recommendations for FAIR PaN data management were presented to the INFRA-EOSC-5 Task force on FAIR in March 2021. The strategy to update the recommendations was defined and will focus on the "core" metadata fields, identified with the highest priority in the first version of the document. We will evaluate how these are implemented in practice, e.g.: are they in WP3's search API, do they relate to other open science models like Dublin Core, B2FIND, DataCite, DCAT2 and NeXus.
Next steps:	A workshop to be held in February 2022 and dedicated to this task is in the planning. The DCAT schema getting good traction in the EOSC ecosystem, WP2 will continue liaising within STFC with the persons involved in a use case integration of DCAT in B2FIND, under the FAIRsFAIR project.

T2.4	Persistent Identifier infrastructure (UKRI)

Progress:	The work on this task so far has been to landscape the PIDs used in the community and outside and to see what possibilities for PIDs/PID graphs we could exploit at our facilities. A first presentation of this work-in-progress was made at the librarian and data managers symposium in September 2021 (see task 2.6).
Next steps:	A second workshop on PIDs is planned for the 22nd of October 2021. It will address state-of-the-art and recent developments in the use of PIDs that are popular elsewhere but are not yet widely adopted by research facilities, with presentations on DataCite, HMC, JLSRF, B2INST and ROR. First ideas on PID use in facility proposals and in data publishing will also be discussed.

T2.5	**Quality assurance and certification schemes for data repositories (UKRI)**
Progress:	This task started with an assessment of the current background of FAIR assessment schemes, using e.g. material published by FAIRsFAIR (M4.2 and M4.3). Early tendency for our approach to this task is to focus on the experimental stages at the beamlines and how we are making (or not) the produced data FAIR. However, this is not the focus of current tools like F-UJI, which focuses on datasets or repositories FAIR assessment. As a result, we may produce a tailored survey to be used for self-assessment by facilities or beamlines themselves.
Next steps:	The self-assessment survey will be proposed to the community along with a launching event around Feb 2022, followed by iterations. How we can link our FAIR assessment to EOSC readiness will also be considered, as a response to one of our mid-term recommendations. As an additional input from the community, the Helmholtz Metadata Collaboration (HMC) Matter will present to us their work on FAIR assessment of beamlines on the 15th of November 2021.

T2.6	**Uptake of FAIR data practices (UKRI)**
Progress:	The recent major WP2 outreach event has been the librarian and data managers symposium, which was held on the 30th of September 2021. WP2 also contributed to the "let's talk about FAIRyfying OS policies" session of the INFRA-EOSC-5 projects at the OSFair in September 2021 and to the synchronisation workshops series of FAIRsFAIR in April, May and June 2021. In April 2021, WP2 facilitated a session on PaN COVID-19 data at the RDA's VP17.
Next steps:	Engagement will continue, targeting other stakeholder groups and providing training material for the PaN training platform. In particular, the possibility to develop tailored DMP training, as well as examples of good practices and observed benefits for our facilities of the use of the DMP template developed as part of task 2.2, will be examined.

KPIs	Value	Previous value
Level of FAIR maturity of participating facilities (% - self-assessment - target TBD)	-	-
# of facilities planning to implement at least one FAIR-related action as a direct effect of ExPaNDS (target: 10/10)	-	-