

# **CatRIS**

## **Catalogue of Research Infrastructures Services**

### **Horizon 2020 CSA**

### **WP2**

### **Management**

### **Deliverable 2.3**

### **Report on Advisory Board meeting outcomes n°2**

**Main Author(s):**

Xavier Meyer, Ana Helman, ESF

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## List of Contributors

Partner	Acronym	Partner name	Name of contact
1.	ESF	European Science Foundation	X. Meyer
	ESF	European Science Foundation	A. Helman
	ESF	European Science Foundation	C. Steinmetz

## Document Revision History

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## Summary

This report provides an overview of the discussions held with members of the CatRIS Advisory Board (CAB) at their second meeting that took place on 29 January 2020 at the National Documentation Centre (EKT) in Athens (Greece).

## Participants

Present (CAB): Johannes Janssen (JJ, DFG), Robert Jones (RJ, CERN); Fredrik Melander (FM, Science Village Scandinavia); David Moorman (DM, CFI); Uwe Sassenberg (UW, Desy); Ondřej Hradil (OH, CEITEC-present by Skype)

Present (CatRIS consortium) : Haris Georgiadis, (HG, EKT), Giorgos Giannopoulos, (GG, NKUA), Ana Helman (AH, ESF), Anna Kamenskaya (AK, CTLS), Xavier Meyer (XM, ESF) ; George Papastefanatos (GP, NKUA); Jorge Sanchez (JS, JNP); Nikos Vogiatzis (NV, JNP); Margherita Zorgno (MZ, EurOcean)

### 1 Welcome & tour de table

### 2 General project progress and discussion

AH presented the objectives and the recommendations from the previous CatRIS Advisory Board Meeting. Regarding the recommendations (presentation available) AH explained that the project timeline is respected at this point and she detailed the work done so far, as well as the communication strategy (objectives), the stakeholders engagement (which are here services providers, researchers & services users from academia & industry, policy makers & funders) and the potential benefits of CatRIS for the community. AH concluded the presentation on the lessons learned from MERIL-2.

US asked how the SPs have been defined and highlighted the difficulty to **define what is a service**. Similarly, he asked what is a RI and if it includes as well private SPs. AH answered by saying that definitions used by CatRIS rely on the definition used by EOSC and EC and that we are using the same classification of services. JS added that CatRIS glossary and vocabulary are available under D4.2. Regarding the EOSC definition of a SP the work is still ongoing work. DM suggested here that an option would be to use the perspective of a private company, for which a definition is not really a priority. For them, it will be more important to obtain direct and relevant information, using an industrial classification.

JJ mentioned that the MERIL portal was based on free-text input of services and he asked what is the level of details that is going to be requested in CatRIS. For example, researchers need a higher level of technical details. DM took this opportunity to ask who is providing information and who is looking for it in the case of CatRIS, because the details are important as well for businesses. DM identified two objectives here: 1) make sure to connect everybody; 2) tell taxpayers that the money they gave is used properly (public relationship exercise). DM stressed the need to be **realistic on the objectives** for CatRIS. US said that among the collaboration between RI and industry, the website of DIAMOND provides an example (link [here](#)). US agreed with DM on the importance to **advertise CatRIS** and to engage in parallel in a **public relations exercise**. US suggested to work on one example and concentrate on the outcomes. DM agreed and confirmed. RJ agreed with the objectives developed above. RJ is not sure how CatRIS could demonstrate its impact, but likely CatRIS can monitor its usage. Although this does not show the full impact, it already shows the level of demand and it is a good starting point. DM added that there is a difference between storytelling and analytics.

Funders want to know that money is used well. JS mentioned that EC wants to break national barriers and that every European should be able to access to it. Some difficulties may arise at the national level and language is one of them.

US used the example of DESY to discuss about sustainability. DESY is currently overbooked and industry only wants to pay if they receive an excellent service. In the case of DESY, the information in MERIL was not updated because the service was overbooked anyway, and the RI was not looking for additional users. To illustrate how important it is not to focus only on the core users, DM used the library science example where libraries are serving many different user groups.

DM mentioned the visitor distribution on the CFI website: 21000 visits, 41% are from universities and are more interested to see who got what and who are the potential competitors. 39% are industries, the rest are non-for-profit organisations, governments, etc. Regarding **sustainability**, what it matters is to be too big to fail or too valuable to lose. JS said that CatRIS is focusing on all levels (European, national, regional, local) and that for the EC, users would be the researchers. DM asked why not open CatRIS to private sector? Why not include as well the companies that provides services to RIs?

FM said that European countries are quite different between themselves in the way of functioning. He proposed to use a stepwise development. The first step would be to target the top 30 European institutions, then focus on the national level, and later, on universities.

A discussion followed on the specificities of the public versus private sector in the European context. It has been concluded that a model for a sustainable database is that it should be useful to everybody. A stepwise strategy was recommended, and the possibility of public and private partnerships was suggested as a solution.

### 3 Demo presentation of the online catalogue & onboarding processes

AH and GP informed the CAB about the GDPR issue regarding the transfer of MERIL data to CatRIS catalogue. DM replied that the reasons for the data transfer from MERIL to CatRIS should be explained in the invitation. It is really important to be transparent and obtain trust. DM liked the dashboard and thought it was a very good idea.

FM enquired about the cost for updating the information later and asked about the core objectives. He also wondered if all this information was needed. FM thinks a trade-off should be done. FM suggested to use an automatic email to update the information regularly. FM asked how quality control will be done. JS answered that CatRIS, if everything is working correctly, will gather millions of data. Currently, 6-7 mandatory fields are in use and filters will evolve over time. An automatization will be needed for the system to correctly. APIs also need to be implemented.

Two types of quality control are envisaged: at the time of onboarding and on a yearly basis (if not updated, the information will be removed automatically after a certain period of time).

US asked if a **back channel for user's feedback** is in place. It would be quite helpful in case of a bad description for example. Such channel is needed to have a direct link between the users and the database manager. DM said that AI may be a solution in the future. Volume is the problem, if it is too important, human interventions become a limiting factor. DM said that when we asked something to somebody, it is needed to provide something in return. The dashboard is important for this reason as it allows to provide a feedback to the service providers about their services. The user can therefore use the dashboard to justify the time spent to enter the data.

### 4 Stakeholders mapping & engagement

XM presented the results of the mapping exercise to identify the main RI Service Providers in Europe based on their participation in European Horizon 2020 projects (presentation available).

US suggested to also map InterREG funds, which use European Structural Funds. RJ said that if we proceed only by clusters, some fields will not be represented (e.g. energy). ESFRI should be looked at as well. Regarding big institutions such as CNRS, RJ suggested to contact the centralized office. DM mentioned that a potential leverage may be that if you received public money, you should later register in CatRIS. JJ said that if we considered the lowest level in such clusters, we can get the information that is useful for scientists. At higher levels, we will start to have an idea of the landscape at national or European level. For example, for INSTRUCT, they already doing storytelling to the public. All of this information is needed, in order to target different publics.

Aggregation is new in CatRIS, so we do not know yet how comprehensive the catalog will be. DM mentioned that linking inventories (national, European, international) is needed to answer questions. This is possible conceptually speaking, but it needs a political support to go further

and EU is a big player. OH agreed with David's opinion and JJ's comments and asked what are the expectations and the logic behind CatRIS? FM asked about potential limitation and existing ecosystem around the RI. RJ mentioned the EOSC landscape validation workshop that will held in March and said that what is missing is to check the maturity level of projects. JJ said that for ESFRI, distributed infrastructures may be difficult to apprehend because they are not automatically visible at the aggregation level. DM said that the key information here is the email address and phone number, which are necessary to connect people together. Without that, it is just a catalog. FM said that CatRIS should be complete enough to get an added value for future development. OH said that alignment with EOSC is good and asked about the strategy for CFs and SSRs.

## 5 Feedback and recommendations

Advisory Board Members summarized their feedback and main recommendations as follows:

**DM** said that the main difficulty resides in the fact that CatRIS is a project, which does not have sustainable aspects-built in. There is therefore need to work with the EC on that. In order to be sustainable, plans need to be developed on the long-term, not just for the project's lifetime. If not, there may be a large gap in funding. The work on the integration of the MERIL data to CatRIS needs to be done as soon as possible. CatRIS has a practical utility, because it can serve as basis for later discussion with the EC. CatRIS should be presented as an experience (positive approach) and the consortium needs to make sure that EC understands that. It can lead to a real breakthrough. The challenge is to be able to show that you are already starting to have an impact so effective communication is the key! First step is to talk to RIs, but why not go to a broader audience of expected users at the same time. It is essential to use modern ways of communication (FB, Twitter, etc.). Having a champion could be important, a third party that can talk positively about CatRIS.

**US:** Relating to the interaction with users, what is missing are some examples to guide users to the right search strategies. The examples should be on the platform, since some users will have limited knowledge about how to use it. Such examples can also be used to advertise the platform to the public. It would also be nice to add an invitation function, so that, if someone is convinced of it, he can send an invitation to others. CatRIS platform needs to have a backdoor channel from user to CatRIS manager in order to share comments and critics. It is important not to forget to look at the maturity of the projects (ESFRI is not yet mature). Analyzing the history of ESFRI may be more interesting. National RI also need to be taken into account as they have some potential for interest internationally speaking. The marketing aspect is also a crucial point and the key is to have a huge number of users. US added a technical remark mentioning that the use of a centralized email for the purpose of contacting RIs is better, as it is stable and compliant with GDPR. Moreover, such emails are public, so easy to find.

**RJ:** CatRIS should clarify the following questions: What is the position of CatRIS in the overall RI environment? How are the others doing similar things? CatRIS deals with data about data providers, not research data themselves. There is no clear boundary regarding data collection

therefore there is a risk of overlap with other projects. The question of trust is important, and CatRIS needs to become a trusted source for users. For example, in the USA there is Science Exchange. CatRIS needs to consider attending the next event about Big Science Business Forum in Spain<sup>1</sup>. ESFRI can be an opportunity too and CatRIS should contribute to the landscaping work with ESFRI. The all-projects mailing list from EOSC may be a good channel to disseminate the information.

**FM:** The current project should focus on what can be delivered during the current lifespan, i.e. provide a demo or a pilot and show how can it be supported at institutional level. The expectations should be set already at the mid-term review. The focus should be on mature European RIs that need to be showcased. Later, the EC needs to be shown what resources (time, money, etc.) are needed to expand the coverage. Trust is a very important point. Another important aspect incentives for users. Service Providers are putting time in CatRIS, they need to understand the added value. One incentive is commercial, but if the SP is overbooked, what is the added value? A reciprocity is needed.

**JJ:** CatRIS needs to be clear about what it wants to achieve. There are several options regarding sustainability: 1) complete the project and finish; 2) Emphasize what might be the future direction, showcase type of studies for national and regional facilities. Showcasing through CTLS could be good, analyze the result and outline what arise. The opening to other fields should be for later. MERIL integration is a very good point.

**OH:** suggested that it is needed to guide the users to register to the database through some examples and showcases. Many examples are available on ESFRI website. Promotion should be done in groups among ESFRI, CTLS and later expand.

## 6 Relationship with EOSC

The following issues were raised during the discussion:

- the need to clarify what is CatRIS relationship with EOSC
- the possibility to make this an argument for sustainability or complementary relationship

JS clarified that there is a direct relationship, CatRIS is officially participating to EOSC. Whatever CatRIS delivers could be transferred to the EOSC managing structure. He also noted that EOSC is supported by EC DG Connect while CatRIS is funded by DG Research. Therefore, this is a collaboration between two DGs. EOSC and CatRIS are partners, CatRIS is built with the same specifications as EOSC. Onboarding will give the possibility to have access to EOSC.

DM reminded that EOSC is not supposed to be limited in time, so CatRIS needs to highlight what will be lost if CatRIS would disappear. This is a crucial point.

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<sup>1</sup> <https://www.bsf2020.org/>

JJ stressed that CatRIS is targeting a niche within EOSC. It is dealing with **data generating facilities** that increasingly provide data analysis and data storage for reuse. CatRIS should emphasize that and discuss with the PO, DG and EC about that. It is a way for sustainability. The goal should be to develop a specific call on data generating facilities.

JS: EOSC is targeting digital and intermediate level (aggregation of specific services). CatRIS needs to position itself on physical infrastructures since nobody is doing that yet.

RJ: these aspects need to be presented at the mid-term review. The idea of being the **link to physical infrastructures** is important, nobody is doing that. CatRIS needs to show that the catalogue is compatible with EOSC and demonstrate the relevance. For now, it is linked to DG RTD, it needs to show them how it can connect to DG Connect as well.

## 7 Sustainability

A question was raised whether the project can be sustained after the end of current EC funding. AH mentioned that without external funding the project can not continue even if there is willingness from partners to continue working on it.

The CAB members recommended to ensure **institutional links** to sustain the catalogue. EOSC can remain as an option, but there may be other as well. A discussion with the EC on what would be their needs and expectation is crucial in this context.

Regarding sustainability, the targets should be:

- to onboard the maximum of Service Providers, and deliver inputs into EOSC
- ensure that stakeholders see that that CatRIS is useful and realize the need to sustain it. Stakeholders includes the DGs as the sponsors

The different options (including no continuation for CatRIS) should be presented to the Commission.

In any case a strong institutional mandate would be needed and possible **partnerships** should be investigated. For example, traditional research institutions. JRC would need to be involved as well if possible.

The most important objectives are: for the users to find proper tools; to develop market for RIs; and from the political prospective, a transparent services market and the optimisation of taxpayer's money.

The meeting was concluded by thanking all members for their participation and inputs.

## 8 Summary of main recommendations

- **Sustainability** is one of the main challenges for the project, and it should be developed on the long emphasizing what might be possible the future direction and showcasing type of studies that can be done on national and regional facilities. EOSC could also offer opportunities.
- **Integration of MERIL data:** should be done as fast as possible to the benefit of CatRIS sustainability.
- **Interaction with users:** some examples of usage should be developed; users should have a back channel to communicate with the CatRIS Manager.
- **Position CatRIS in the European landscape** and EOSC in particular. CatRIS is unique in that it addresses data generating (physical facilities).
- **Development and maturation of the project:** focus on what is achievable, use a step-by-step approach.
- **Communication:** crucial point, would be beneficial to find a champion.

Recommendations from previous meeting:

- **Sustainability:** CatRIS should make an estimation of operating costs for maintenance, data curation and updating required for long-term sustainability of the catalogue beyond the project stage.
- **Legal and regulatory framework:** CatRIS should have specific work done on how it positions itself on GDPR, and on EU directives on database rights, copyright, and public sector information.
- **Content responsibility:** CatRIS should clarify who has the liability of the maintenance and updating of the catalogue – those maintaining the database, or the service providers.
- **User needs:** tailoring for users' needs should be made clear in the data collection and its methods. CatRIS should provide information on, e.g., prices, availability, quality, and so on to attract users, and especially business users.
- **Motivation:** for service providers to supply the content, and for user to go and be able to find the information should have priority.
- **User experience:** using the portal should be as simple as possible, with clear and plain, business language version. A quick and easy way, with adequate information and wording are needed to explain what is available, and what is to be gained.
- **User segmentation:** CatRIS should look at what are the scenarios, and thus, who are the real users of the catalogue, as segmented by different scientific domains, industry users, and so on.
- **User guidance:** CatRIS should implement ways to help those users who may require guidance in defining what kind of services they need to achieve their goals.
- **Service provider segmentation:** CatRIS should consider what would be the position of private services providers in CatRIS, and whether those should be included in the catalogue.
- **Information retrieval:** CatRIS should find an efficient way of putting the data available for users by automating as much as possible the information retrieval. Research into already available, less time-consuming techniques should be made.

**Annex**

**CatRIS Advisory Board Meeting**  
**29-30 January 2020**  
**Draft Agenda**

***Day 1: 29 January 2020***

12:00 - 13:30	Arrival and Lunch
13:30 – 13:45	Welcome and tour de table
13:45 – 14:15	General project progress (A. Helman, ESF)
14:15 – 14:45	Demo presentation of the online catalogue (NKUA, G. Papastefanatos) Onboarding processes (A. Helman, ESF)
14:45 – 15:15	Stakeholders mapping and engagement (X. Meyer, ESF)
15:15 – 15:30	Coffee break
15:30 – 17:00	Discussion on strategic issues: <ul style="list-style-type: none"> <li>○ Expected usage of the catalogue</li> <li>○ Engaging stakeholders and demonstrating value</li> <li>○ Future business models and sustainability</li> <li>○ Contribution and alignment to EOOSC</li> </ul>
17:00 – 17:30	Any other items and wrap - up

***Day 2: 30 January 2020***

09:00 - 10:00	Recommendations from the CAB to the CatRIS consortium
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