H²IOSC

Humanities and cultural Heritage Italian Open Science Cloud

Trans-National and National Access to the H2IOSC RIs Cluster Services

GUIDELINES

June 2025

www.h2iosc.cnr.it

Index

Introduction

The H2IOSC project, implemented by the National Research Council of Italy (CNR - Consiglio Nazionale delle Ricerche), aims at creating the **Humanities and cultural Heritage Italian Open Science Cloud**: an Italian Cloud Network for research in humanities, linguistics and heritage science, by fostering the collaboration of the **Italian nodes** of the European Research Infrastructures (RI) committed in the Social Science and Humanities domain: **CLARIN** (Common Language Resources and Technology Infrastructure), **DARIAH** (Digital Research Infrastructure for the Arts and Humanities), **E-RIHS** (European Research Infrastructure for Heritage Science) and **OPERAS** (open scholarly communication in the social sciences and humanities). They have in common the focus on cultural materials and content, the interdisciplinary scientific communities, the move toward open access practices and FAIR approaches and the increasing use of digital data, formats and tools to create, collect, assemble and curate relevant information, which has prompted remarkable changes in the scale and scope of research in these disciplines.

The landscape of humanities, linguistics and heritage science is still fragmented, with data often collected and shared in a punctual and isolated way; conversely, the usability and impact of data can significantly increase if it is more easily accessed from a single-entry point, simplifying procedures and allowing comparative analyses and pattern detection. Effective interconnection among these Research Infrastructures, collaboration and interdisciplinarity can contribute to an integrated ecosystem of research that allows coherence between European, national and regional priorities and policies, better alignment of the national systems, shared good practices and long-term sustainability.

The H2IOSC Cluster is offering **free-of-charge Trans-national access (TNA)** and **National access (NA) to advanced digital services and tools** from CLARIN-IT, DARIAH-IT, E-RIHS.it and OPERAS-IT, for conducting innovative and computationally intensive research on complex digital data and objects. Looking forward to the end of the H2IOSC project, the Humanities and cultural Heritage Italian Open Science Cloud, with a one-stop, easy-entry place, will be accessible with all the optimised RIs Cluster

services, where users will find a set of software, tools, datasets, and pilot projects supporting specific needs of humanities, linguistics and heritage sciences sectors.

This document outlines the guidelines for the TNA/NA to the H2IOSC RIs Cluster services made available by the project. It provides information about the available services, type of access, eligibility and evaluation criteria, documentation to produce, privacy and data policies.

The **Access Coordination and Management Unit** of H2IOSC serves to centrally prepare and manage the TNA/NA calls for proposal to provide the highest degree of integration in accessing the wider range of H2IOSC's services. The calls for the H2IOSC network will be open to both academics and industrial research/activities, establishing unified access procedures and a single working point of access.

Definitions

Research infrastructure:

Research Infrastructures (RIs) are facilities, resources and services that are used by research communities to conduct top-level research and foster innovation in their fields. They can include: scientific equipment or instruments; knowledge-based resources such as collections and archives or structures for scientific information; Information and Communications Technology-based infrastructures such as grid, computing, software and communication, or any other entity of a unique nature essential to achieve excellence in research. They aim at integrating and making available key regional and national facilities throughout Europe, ensuring their optimal use and joint development.

Access:

Within Research Infrastructures, Access refers to the physical, remote and virtual admission to, interactions with and use of Research Infrastructures. It makes available services, facilities and resources to the European and global scientific community, according to specific procedures depending on the type and structure of the infrastructure itself and the data provided. It promotes multi-disciplinarity and mobility to support diverse public and private communities in the scientific

and industrial sectors. Access in H2IOSC follows the "European Charter for Access to Research Infrastructures" and the single infrastructures' rules.

Trans-national access (TNA) in H2IOSC represents the access to H2IOSC services, facilities and resources for applicants/users employed outside Italy (the host country of the H2IOSC consortium).

National access (NA) in H2IOSC represents the access to Research Infrastructures on a national scale for applicants/users employed in Italy, who are external to H2IOSC Cluster and participating infrastructures.

Within access types, **virtual access** entails the employment of digital service, tools and data provided through communication networks, which can be simultaneously available to users. In the case of limited resources available (e.g. storage capacity and computing power), users can be selected. Within the modes of selection, **competitive excellence-driven access** is based on application and is exclusively dependent on its scientific excellence, originality and quality, evaluated through peer review.

Applicant:

Applicants can be individuals or teams from academia, industry and public services, who apply to a call for proposals of H2IOSC services. They are engaged in the conception or creation of new knowledge, products, processes, methods and systems and also in project management. Teams may include PhD students, technical staff and students who participate in research as part of their studies.

User:

Users are the individuals or teams from academia, industry and public services, which, having positively passed the application process of TNA/NA, are granted access to the services and tools offered by H2IOSC.

Application process

Who can apply

As a general term, TNA can be broadly defined as the process in which users can access services located in another country, while NA is the access to services located in the same country of the

user, excluding intra-institutional access. TNA/NA calls will be open to both academics and industrial research projects.

Applicants can be individuals or teams from academia, business, industry and public services; teams can include researchers, doctoral candidates, technical staff and students participating in research in the framework of their studies.

Available services

The services provided by H2IOSC during its TNA/NA calls are advanced digital services and tools from the Italian nodes of the four research infrastructures, either refactored or implemented during H2IOSC; they can also include cross-domain services and proof-of-concept sets of resources developed as H2IOSC community pilots. Each service is given a maximum of users per TNA/NA call, depending on resource availability and techno-scientific assistance availability.

Access model

The H2IOSC TNA/NA offers **virtual services and resources** through **excellence-driven access** mode, which is based on **application** and is dependent on scientific excellence, originality and quality of the access proposal, **evaluated** through a peer review conducted by the **H2IOSC External Advisory Board (EAB)**, after a technical, logistical, and ethical feasibility assessment from the service providers. Access can be requested for general research activities or for a specific project, by a single researcher or a team.

The added value

All the access to H2IOSC services will offer **techno-scientific assistance** to the users throughout the research activities. This includes expert guidance on utilising the available resources and helping resolve any technical or scientific issues that may arise. For specific services, it also includes data analysis and measurements via digital and analytical resources, or the support for data sharing and exposing. Additionally, a **helpdesk** from the Access Coordination and Management Unit of H2IOSC will be available as a central information hub to respond to any inquiries or needs of the applicants during the application process (e-mail: **tna.h2iosc@h2iosc.cnr.it**). The added value of these calls for access lies in the robust support framework, which not only facilitates smooth and efficient research

processes but also enhances the overall user experience, contributing significantly to the success of the participants' scientific endeavours.

Timing

The H2IOSC TNA/NA call is open for **three weeks** from its announcement.

Submission phase: before submission

Among the proposals, priority is given to TNA, i.e. applicants located outside Italy.

Compliance with the H2IOSC TNA/NA policy

All personal data collected from applicants during the application process are used solely by the H2IOSC project for the operational management of TNA/NA Calls and for the proper performance of its legal tasks and duties related to communication and research, in accordance with H2IOSC TNA/NA Calls - Information on processing of personal data. No personal data is shared with parties external to the TNA/NA process, nor will personal data be rented, sold, or otherwise shared with or provided to third parties other than for reporting purposes. Applicants are required to view and consent to the H2IOSC TNA/NA Calls - Information on processing of personal data upon application. Moreover, the applicant must comply with the User's Obligations described in these Guidelines and with the H2IOSC Research Data Policy.

Submission phase: during submission

The submission should be presented by filling in the **online application form** available in the dedicated section of the website (https://www.h2iosc.cnr.it/) during the calls' opening time.

Application form

The **application form** consists of three sections, tailored to collect specific information necessary for the evaluation and consideration of the applicant(s) and the research activity/project for which access is requested.

A. Applicant information

This section comprises information about the applicant(s), including names, affiliations, and contact details, as well as a short description of their research interests, experience and scientific excellence

(max 800 characters incl. spaces). If the application is presented by a team, the Team Leader will be responsible for the application process and hold all correspondence regarding the TNA/NA.

B. Activity/Project Information and Selection of Service

This section should provide essential information on the research activity/project for which access is requested:

- Project's title and acronym (if any)
- Activity/project brief description (max 1000 characters incl. spaces)
- Scientific and technical main objectives of the activity/project, describing its innovative aspects and potential for scientific development (max 500 characters incl. spaces)
- Impact of the activity/project, describing its benefits and interest for the scientific community, expected results and dissemination plan (if any) (max 500 characters incl. spaces)
- List of keywords to describe the activity/project focus.

Applicants also specify the service they intend to use for their project/activity, providing a brief explanation of its relevance (max 1000 characters incl. spaces); some of the services also require specific additional information.

C. Compliance with the H2IOSC TNA/NA Policy

Single applicants or Team Leaders must agree with the terms and conditions for access described in these Guidelines and the **Research Data Policy** and accept the **H2IOSC TNA/NA Calls - Information on processing of personal data.**

Each applicant or team may submit only one application proposal per service per call.

Submission phase: after submission

Evaluation panel: External Advisory Board (EAB)

The **External Advisory Board (EAB)** of H2IOSC constitutes the evaluation panel.

Appointed by the Project Management Board, the EAB performs international-level advice and evaluation both on the quality of the services provided by H2IOSC and on the quality of the users allowed to access the RIs. EAB is composed of representatives of the main stakeholders in the field

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of research on Social Science and Humanities domain of the European Strategy Forum on Research Infrastructures (ESFRI).

Proposal Evaluation

Proposal evaluation starts after proposal reception and lasts approximately 4 weeks. Upon receiving applications, the Helpdesk conducts an initial eligibility check to ensure compliance with H2IOSC TNA/NA regulations, and service providers conduct a technical, logistical, and ethical feasibility assessment. Applications compliant with regulations and feasible are sent to the External Advisory Board (EAB) for scientific evaluation.

The scientific evaluation criteria include:

- Scientific excellence and innovativeness of the proposal: clarity of the project/activity's objectives, originality, soundness of the proposed methodology;
- Impact of the proposal: broader scientific, social, environmental effects and benefits to the economy, society, culture, public policy; dissemination strategy, if any;
- Clarity of the proposal text.

Each proposal is evaluated against each evaluation criterion with a score from 1 to 10. The overall result is the mean of the results for each criterion.

This result is used for the proposals' ranking in case of overbooked services.

Proposals with a score under 6 are excluded from the ranking. Among the proposals reaching the minimum passing score of 6, priority is given to TNA; if the number of users per service is not reached, the NA, in order of ranking, up to the maximum number of users per service, are also granted access. Therefore, a positive evaluation does not guarantee access provision by itself.

Proposals not reaching the minimum passing score or with a ranking too low to guarantee access can be resubmitted in future calls.

Communication of the Evaluation results and Access Agreement

After the evaluation, communication of the results will be sent to the Applicants by the helpdesk via email.

For the proposals to which access is granted, an **Access Agreement** will be sent with the communication of results.

The **Access Agreement** details the terms and conditions governing access within H2IOSC calls, ensuring clarity, accountability and a smooth collaborative process. It addresses various aspects, including schedule, access protocols, compliance with H2IOSC research data policy, and privacy standards. A template for the access agreement will be sent to the Applicants of accepted proposals, to be filled in and signed by both the Single applicants or Team Leaders and the Director of the Institute of reference of the Italian node of each infrastructure, before the starting date of each TNA/NA. Once signed, the document should be forwarded to the helpdesk, and it will be collected through a dedicated repository.

Operational phase

Access to services and techno-scientific assistance

Successful proposals are granted access to the requested services, for a period of approximately **four weeks**.

Access policy and users' obligations

H2IOSC services must be used only for activities attributable to the field of Humanities and cultural Heritage. The services provided, as well as any scientific contributions made by the techno-scientific assistance, must necessarily be recognised as supporting the scientific activity of the users.

Users may not use the resources or services for illicit and/or fraudulent purposes and may not in any way engage in behaviour that circumvents any administrative and/or security controls that may be required. Users must respect intellectual property rights, any confidentiality agreements, and the principles of Open Access.

Post TNA/NA

Data sharing

Data produced during access within H2IOSC services must adhere to FAIR principles. This means data should be:

- easy to find for both humans and computer systems, thus deposited through trusted repositories and based on mandatory description of metadata (Findable);

- made available long-term under well-defined licences, possibly open, whether at the level of metadata, or of the actual data content, and have persistent identifiers (Accessible);
- ready to be combined with other datasets by humans as well as computer systems, by using common formats following open data standards (Interoperable);
- ready to be used for future research and to be processed further using computational methods, and complying with high-quality documentation practices (Reusable).

Feedback questionnaire

After access, users will be asked to fill in a comprehensive **Feedback Questionnaire** to assess the TNA/NA user experience. The questionnaire covers aspects about the application and proposal submission process, the quality of communication with the helpdesk, the techno-scientific assistance, the interest in H2IOSC services and tools, and overall satisfaction with the TNA/NA program. Users will be encouraged to share their suggestions for improvements, any challenges encountered, and recommendations for fellow researchers. By collecting this valuable feedback, the aim is to enhance the TNA/NA program and better cater it to the needs of the research community, ensuring a seamless and productive experience for all participants, also in view of H2IOSC future operation after the end of the project.

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