



Institutional Policy for Research Data Management and Sharing

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2025/12/03



- Summary – Last Training Session : Introduction to AIBILI Dataverse Repository
- **Institutional Policy for Research Data Management & Sharing**

DC/738/25 - AIBILI-Data Centre

**RI/00139/2024 - Constituição de Centros para a Gestão de
Dados de Investigação**

MAIN ACTIVITIES

- Promote **training sessions** on best practices for research data management
- Implementing an **Institutional policy** for the management and sharing of research data.
- Establish an **Institutional Research Data Repository** - AIBILI Dataverse Repository
- Management and sharing of **Research Data in Open Science**.
- **Integration and collaboration** in a national network of **datastewards**

Summary: Open Science

“Open Science is an approach to research based on open cooperative work that emphasizes the sharing of knowledge, results and tools as early and widely as possible.”

European Commission

Encourages **collaboration across academia, industry, public authorities, and citizen groups.**

OPEN AS POSSIBLE, CLOSE AS NECESSARY

Open Access to publications and research data is a pillar of Open Science.



Summary : FAIR PRINCIPLES



Metadata and data should be **easy to find for both humans and computers**. Machine-readable metadata are essential for automatic discovery of datasets and services



Data should be able to integrate with other data and systems. This requires the **data** to be in a **formally defined, standard format that can be used by various common analysis and storage tools**.



Data should be retrievable, even if restrictions or permissions are required. This means having a **clear, transparent, and standardized protocol for accessing the data**



Data should be easy to reuse by others. This involves providing **clear conditions for use**, a domain-relevant data standard, and sufficiently detailed metadata to allow for meaningful reuse and replication.

Summary: AIBILI DATAVERSE REPOSITORY

Software chosen for **AIBILI Dataverse Repository**

- Fair Principles
- Customizable
- Interoperable
- Use by other stakeholders, both national and international
- Long-term data preservation



- Studies: PROGRESS and PROGRESS 10 funded by CTI, and CORDIS funded by FCT
- Data: Clinical, demographic, and imaging data (SD-OCT and CFP)
- Publications will also be deposited in the AIBILI Dataverse repository without access restrictions
- **Dataset Access restricted:** available upon direct request from the AIBILI Dataverse repository



Validation by DAC (*dac@aibili.pt*)

Institutional Policy for Research Data Management & Sharing

INSTITUTIONAL POLICY

FOR MANAGEMENT AND SHARING OF RESEARCH DATA

APPROVED
06/10/2025

1. Preamble and Scope

- a) AIBILI - Association for Innovation and Biomedical Research on Light and Image is a Research Technology Organisation in the health area dedicated to development and clinical research of new products for medical therapy and diagnostic imaging. In this context, AIBILI, as a Research Performing Organization (RPO), commits to the advancement of science and the wide dissemination of knowledge to the benefit of society by adopting practices on open, reproducible and responsible research.
- b) AIBILI recognizes "openness" as one of its guiding principles and commits to promoting it by - among others - encouraging and supporting research processes and tools that encourage collaboration, enabling new working models and new social relationships, stimulating the dissemination of knowledge and the accessibility and re-usability of research outputs, encouraging open access to Publications and Research Data from Publicly funded monocentric national studies sponsored by AIBILI performed at AIBILI Clinical Trial Centre and supported by an Electronic Data Capture (EDC) system. Research Data is defined as the data (such as clinical and demographic data and images) used to validate the results presented in scientific publications or other data described in the Data Management Plan. Genetic data, due to its highly sensitive nature, requires stringent protection measures, and therefore is not included in the Research Data definition.
- c) Open access to Publications and Research Data will also be applied if requested by public funding bodies financing the clinical study.

2. Jurisdiction and Effect of Policy

The Policy applies to all researchers active at AIBILI. In cases where research is funded by a third party, any agreement with that party concerning access rights, deposit and storage takes precedence over this Policy.

The Policy has been approved by the Management Committee and takes effect from 06/10/2025

3. Rights, Responsibilities, and Duties

3.1 AIBILI is responsible for:

- a) Supporting and empowering the transition of Publicly funded monocentric national studies sponsored by AIBILI, performed at AIBILI Clinical Trial Centre and supported by an EDC system, to Open Access/ Open Science through education, training and awareness-raising actions targeting researchers and other employees, along with the provision of the necessary infrastructure and funding to support this transition.
- b) Establishing the AIBILI Dataverse Repository as the Institutional Open Access Repository according to international standards, containing digital content and providing advanced tools for search, navigation and Open Access to its content.

- Políticas AIBILI
 - Cronograma de Retenção
 - Política da Qualidade e de Segurança da Informação
 - Política Institucional de Ciência Aberta
 - Políticas Privacidade, Cookies e Website
 - Políticas Segurança IT

[Click here](#); available at Filedoc

Website

<https://www.aibili.pt/openscience/>

References: <https://www.openaire.eu/model-policy-on-open-science-for-research-performing-organisations>

"Quadro de referência para Políticas e Estratégias de Ciência Aberta e Gestão de Dados de Investigação", (13/06/2025)

- **Commitment:** to advancing science and widely disseminating knowledge for the benefit of society by adopting practices of open, reproducible, and responsible research;

- **Principle:** “as open as possible as closed as necessary”;

- **Applicable:** publicly funded, monocentric national studies sponsored by AIBILI, conducted at the AIBILI Clinical Trial Centre, and supported by an Electronic Data Capture (EDC) system.

- Open Access to publications

- Restricted access to research data : clinical & demographic data, images. Genetic data, due to its highly sensitive nature, requires stringent protection measures, and therefore is not included in the Research Data definition.

1. Preamble and Scope

- AIBILI - Association for Innovation and Biomedical Research on Light and Image is a Research Technology Organisation in the health area dedicated to development and clinical research of new products for medical therapy and diagnostic imaging. In this context, AIBILI, as a Research Performing Organization (RPO), commits to the advancement of science and the wide dissemination of knowledge to the benefit of society by adopting practices on open, reproducible and responsible research.
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2. Jurisdiction and Effect of Policy

The Policy applies to all researchers active at AIBILI. In cases where research is funded by a third party, any agreement with that party concerning access rights, deposit and storage takes precedence over this Policy.

a) Transition to Open Science

- Supporting the adoption of open science practices to data resulting from publicly funded, monocentric national studies sponsored by AIBILI, conducted at CEC, supported by EDC system.
- Deliver education, training, and awareness activities for researchers and staff.
- Provide the required infrastructure and funding to enable this transition.

b) Institutional Dataverse Repository

- Establish the AIBILI Dataverse Repository as the Institutional repository for data and publications.
- Ensure compliance with international standards.
- Host digital content and offer advanced tools for search, navigation, and Access.

c) Use of Persistent Identifiers

- Mandate persistent identifiers (e.g., DOIs, ORCID) for policies and researchers.
- Enhance the overall FAIRness and traceability of research data outputs.

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- b) Establishing the AIBILI Dataverse Repository as the Institutional Open Access Repository according to international standards, containing digital content and providing advanced tools for search, navigation and Open Access to its content.
- c) Mandating the use of persistent identifiers (like DOIs, ORCID or others) for both policy and researchers to support the overall FAIRness of data outputs.
- d) Releasing a Data Management Plan (DMP) for each research study before the beginning of data collection. The DMP is updated as necessary over the research lifecycle. Updated DMPs are version-controlled.
- e) Personal Data Privacy Committee is responsible for promoting compliance and awareness of applicable personal data protection laws, in particular Regulation (EU) 2016/679 of the European Parliament and of the Council of 27 April (GDPR), Portuguese Law n°58/2019 of 8th August and AIBILI Data Protection and Privacy Policy (<https://www.aibili.pt/privacy-policy/>), advising on the implementation and monitoring compliance of data protection standards, data curation and stewardship.
- f) Developing and providing mechanisms and services for storage, safekeeping, registration, deposition and sharing of data and other records, according to the FAIR principles, as well as their long-term preservation, and providing appropriate guidance to researchers.
- g) Embedding Open Science practices in Publicly funded monocentric national studies sponsored by AIBILI, performed at AIBILI Clinical Trial Centre and supported by an EDC system, namely in recruitment, research assessment and evaluation criteria beyond the provision of open access to publications and data.
- h) Monitoring policy compliance by comparing the content of the repository with information gathered from indexing services and through data on the use (access and downloads) per publication/department/unit/institute etc.
- i) Ensure support for the justified costs related to Research Data Management (RDM) and the implementation of practices that make data FAIR (Findable, Accessible, Interoperable, and Reusable).
- j) Foster a collaborative approach among researchers and support staff to identify relevant costs for grant applications, emphasizing the importance of including these costs through the creation of a comprehensive data management plan.
- k) Ensuring the compliance of the AIBILI Dataverse Repository in relation to FAIR (Findable, Accessible, Interoperable and Reusable) data principles.
- l) Having Intellectual Property Rights (IPR) and data protection policies in place to support Open Science.
- m) Having an Open Licensing policy mandating a coherent and comprehensive set of licenses for releasing content and data.
- n) Promoting Open Science practices and related skills.

d) Data Management Plans (DMPs)

Require a DMP for every study before data collection.

Update and version-control DMPs throughout the research lifecycle.

e) Personal Data Privacy Oversight

CPDP promotes compliance with GDPR, Portuguese Law 58/2019 & institutional policies.

Advises on implementing and monitoring data protection, curation and stewardship.

f) Storage, Preservation & Sharing Services

Develop mechanisms for secure storage, registration, deposition and sharing of data.

Ensure alignment with FAIR principles and support researchers through guidance.

g) Embedding Open Science Practices

Integrate Open Science practices into publicly funded monocentric national studies, Sponsored AIBILI, CEC and with an EDC.

Apply Open Science principles in recruitment, research assessment and evaluation beyond open access.

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h) Monitoring Policy Compliance

Track usage metrics (accesses/downloads) by publication research area.

i) Funding for FAIR and RDM Costs

Ensure support for justified Research Data Management (RDM) expenses and FAIR-enabling practices.

j) Collaborative Cost Planning

Encourage researchers and support staff to jointly identify RDM-related costs.

Promote inclusion of these costs in grant applications via comprehensive DMPs.

k) FAIR Compliance of the Repository

Guarantee that AIBILI Dataverse Repository complies with all FAIR data principles.

l) IPR & Data Protection Policies

Maintain robust Intellectual Property Rights and data protection policies supporting Open Science.

m) Open Licensing Policy

Mandate coherent and comprehensive open licenses for releasing content and data.

n) Promotion of Open Science Skills

Foster awareness, training and capacity-building in Open Science practices.

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a) Managing Research Outputs

Handle publications, data and educational resources in line with the principles and requirements of this Policy.

b) Project Registration

Register new research projects at the proposal stage following institutional SOPs to ensure proper institutional support.

c) Compliance with Requirements

Meet all organizational, regulatory, institutional, contractual and legal obligations for producing, curating, depositing, managing and distributing publications and data, unless superseded by third-party agreements.

3.2 Researchers are responsible for:

- a) Managing publications, data and educational resources in adherence with the principles and requirements expressed in this Policy.
- b) Registering new research projects at the proposal stage according to AIBILI's internal procedures (SOP) in order to ensure that they are provided with the appropriate institutional support.
- c) Complying with the organizational, regulatory, institutional, and other contractual and legal requirements related to the production, curation, deposit, management, and distribution of publications and data in case there is no other agreement with third parties taking precedence.
- d) Ensuring that the principles governing the handling of data (in adherence with the present Policy and funders' mandates) are included in a Data Management Plan (DMP).
- e) Approving a DMP for every research activity they are coordinating.
- f) Choosing the appropriate type of licensing for their research outputs.
- g) Use of existing generic and/or domain specific standards or protocols whenever possible.

RIGHTS, RESPONSIBILITIES AND DUTIES: INVESTIGATORS

d) Data Management Principles in DMPs

Ensure that data-handling principles (Policy- and funder-aligned) are captured in a Data Management Plan.

e) DMP Approval

Approve a DMP for every research activity they coordinate.

f) Licensing Decisions

Select the appropriate type of open license for their research outputs.

CREATIVE COMMONS LICENSES		COPY & PUBLISH	ATTRIBUTION REQUIRED	COMMERCIAL USE	MODIFY & ADAPT	CHANGE LICENSE
	PUBLIC DOMAIN	✓	✗	✓	✓	✓
	CC BY	✓	✓	✓	✓	✓
	CC BY-SA	✓	✓	✓	✓	✗
	CC BY-ND	✓	✓	✗	✗	✓
	CC BY-NC	✓	✓	✗	✓	✓
	CC BY-NC-SA	✓	✓	✗	✓	✗
	CC BY-NC-ND	✓	✓	✗	✗	✓

Legend:

- ✓ You can redistribute (copy, publish, display, communicate, etc.)
- ✓ You have to attribute the original work
- ✓ You can use the work commercially
- ✓ You can modify and adapt the original work
- ✓ You can choose license type for your adaptations of the work

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- b) Registering new research projects at the proposal stage according to AIBILI's internal procedures (SOP) in order to ensure that they are provided with the appropriate institutional support.
- c) Complying with the organizational, regulatory, institutional, and other contractual and legal requirements related to the production, curation, deposit, management, and distribution of publications and data in case there is no other agreement with third parties taking precedence.
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- g) Use of existing generic and/or domain specific standards or protocols whenever possible.

g) Use of Standards

Apply existing generic and/or domain-specific standards or protocols whenever possible.

a) Mandatory Deposit of Publications

- Researchers must deposit a machine-readable full text (published article or final peer-reviewed manuscript) and metadata in the AIBILI Dataverse Repository after publication.
- Applies also to Gold Open Access publications.
- Researchers are responsible for timely deposit.

b) Green Open Access Requirements

- Full texts must be made immediately and publicly available under an open license (CC BY, CC BY-NC, CC BY-ND, CC BY-NC-ND or equivalent).
- Monographs must be deposited, but access may remain closed.

c) Open Metadata for Closed Publications

- Metadata must always be openly accessible to increase visibility, even when full texts are closed.

d) Copyright Retention & Licensing

- Authors retain copyright and grant publishers only the rights necessary for publication.
- Ensure Open Access to the Author Accepted Manuscript (AAM) or Version of Record (VoR) at publication.
- Publications must use appropriate open licenses (CC BY, CC BY-NC, CC BY-ND, CC BY-NC-ND or equivalent).

4. Open Access to Publications

AIBILI:

- a) Requires researchers to deposit in the AIBILI Dataverse Repository a machine-readable electronic copy of the full text (published article or final peer-reviewed manuscript), as well as the related metadata after publication. Researchers are held responsible for the timely deposit of their publications in the institutional repository. This step also applies in the case of open access publishing ("Gold Open Access").
- b) In the case of "Green Open Access", the AIBILI requires the full text of all publications referred to above to be made immediately and publicly available¹ under a standard open license (CC BY, CC-BY-NC, CC BY-ND or CC BY-NC-ND) or equivalent. For monographs, deposit remains mandatory, but access could be closed.
- c) Requires the metadata of the publication to be made openly accessible in the case of 'closed' publications with the aim to increase their visibility.
- d) Retain ownership of copyright and license to publishers only those rights necessary for publication. Authors (or their organizations) must ensure Open Access to the Author Accepted Manuscripts (AAMs) or the Version of Record (VoR) of research articles, at the time of publication. All research articles must be made available under appropriate licenses - CC BY, CC BY-NC, CC BY-ND or CC BY-NC-ND, or equivalent.
- e) Requires researchers to deposit in the AIBILI Dataverse Repository publications that resulted from Publicly funded monocentric national studies sponsored by AIBILI, performed at AIBILI Clinical Trial Centre and supported by an EDC system, authored prior to the date of effect of the current policy and make them openly accessible whenever possible.
- f) Data Availability Statements are provided in publications indicating how to access the underlying data or how to request legitimate access to closed data.
- g) Clear guidance on how to cite a broader range of research outputs including data and software, as well as actors and enablers such as data managers, data stewards, funding bodies, research infrastructures and organizations.

e) Deposit of Legacy Publications

- Researchers must deposit publications from publicly funded monocentric national studies (sponsored by AIBILI and conducted at the Clinical Trial Centre) authored before the policy's effective date, making them openly accessible when possible.

f) Data Availability Statements

- Publications must include statements explaining how underlying data can be accessed or how to request legitimate access for closed data.

g) Guidance on Citing Diverse Outputs

Provide clear instructions on citing research outputs beyond articles, including data, software, data managers, data stewards, funders, research infrastructures and organizations.

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- g) Clear guidance on how to cite a broader range of research outputs including data and software, as well as actors and enablers such as data managers, data stewards, funding bodies, research infrastructures and organizations.

a) Deposit of Research Data

- Encourage researchers to deposit data publicly funded, monocentric national studies sponsored by AIBILI, conducted at CEC, supported by EDC system.
- Data should include persistent identifiers and be linked to related publications whenever possible.

b) FAIR Data Handling

- Promote data and service management aligned with FAIR principles.
- Ensure data are traceable and available for reuse whenever possible.

c) "As Open as Possible, As Closed as Necessary"

- Allow restricted access when legal, privacy, or ethical constraints apply.
- Always provide metadata to keep data findable.

d) Mandatory DMP Approval

- Require researchers to approve a Data Management Plan for every eligible publicly funded monocentric national study.

5. Open Access to Research Data

AIBILI:

- a) Encourages researchers to deposit the data of Publicly funded monocentric national studies sponsored by AIBILI, performed at AIBILI Clinical Trial Centre and supported by an EDC system, needed to validate the results presented in scientific publications in the AIBILI Dataverse Repository. Data should be provided with persistent identifiers and must be linked with publications where possible.
- b) Encourages that data and services are handled according to FAIR principles (i.e. Findable, Accessible, Interoperable and Re-usable). Data should also be traceable and available whenever possible for subsequent use.
- c) AIBILI follows the principle "as open as possible as closed as necessary". If data cannot be open due to legal, privacy or other concerns (for example sensitive data or personal data) this should be clearly explained. Metadata ensuring that data are findable should be provided in all instances.
- d) Requires researchers to approve a DMP for every Publicly funded monocentric national studies sponsored by AIBILI, performed at AIBILI Clinical Trial Centre and supported by an EDC system, research activity they are involved in.
- e) Requires researchers to define usage rights through the assignment of appropriate licenses - CC BY, CC BY-NC, CC BY-ND or CC BY-NC-ND, or equivalent.
- f) Requires that data are stored for a certain period (e.g. as defined by the respective protocols and/or AIBILI retention policies). In the event that these records need to be deleted or destroyed after the expiration of the required archived duration or for legal and ethical reasons, such actions need to consider all legal and ethical perspectives.
- g) Requires users to submit a data access request directly on the AIBILI Dataverse Repository that will be either granted or denied by the AIBILI Data Access Committee (DAC). This data access request submission is implemented due to the sensitive type of data that will be stored in the AIBILI Dataverse Repository.

e) Licensing of Data

- Require researchers to assign appropriate usage licenses (CC BY, CC BY-NC, CC BY-ND, CC BY-NC-ND or equivalent).

f) Data Retention & Disposal

- Ensure data are stored for the legally or institutionally required period.
- Deletion or destruction after the retention period must follow all legal and ethical standards.

g) Controlled Data Access

- Users must submit data access requests through the AIBILI Dataverse Repository.
- The AIBILI Data Access Committee (DAC) will review and approve or reject requests due to the sensitive nature of stored data.

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Promotion of Open Science & Citizen Science

Actively promotes Open Science practices beyond open access, encouraging the release of data and content from publicly funded monocentric national studies under standard open licenses.

Supports citizen science projects that comply with all relevant ethical, clinical and data protection laws (national and EU).

Fosters links between citizen science initiatives and student curricula, using these projects to rethink knowledge production and circulation within and beyond the university.

6. Open Science and Citizen Science

AIBILI actively encourages the uptake of Open Science practices (beyond open access to publications and data) the release of Publicly funded monocentric national studies sponsored by AIBILI and run by AIBILI Clinical Trial Centre data and content under open and standard open licenses. AIBILI supports citizen science projects as long as they adhere to all applicable Ethical, Clinical and personal data protection national and European legislation, and where possible connects students' curricula and degrees to citizen science projects as a means to rethink the knowledge production and circulation models inside and outside the university.

a) Repository Quality Standards

Ensure the AIBILI Dataverse Repository meets trusted quality standards: OpenAIRE compatibility, full alignment with FAIR principles, and a transparent repository policy.

b) Registry & Interoperability Compliance

Guarantee that the repository is registered in relevant registries and interoperable through adherence to OpenAIRE Guidelines.

7. Infrastructure

- a) Ensures that the AIBILI Dataverse Repository meets trusted quality standards (OpenAIRE compatible, meeting FAIR principles, has a transparent repository policy).
- b) Ensuring that the AIBILI Dataverse Repository is registered in appropriate registries and is interoperable through the OpenAIRE Guidelines.

8. Research Assessment and Evaluation

- Develop a framework with funders and institutional units that rewards research quality and Open Science practices.
- Adopt Open Science metrics in research assessment and evaluation.

9. Training

- Ensure ongoing training for staff on Open Science topics
- Provide appropriate funding and seek synergies with Research Funding Organizations (RFOs) and other stakeholders.

10. Monitoring Policy Compliance and Validity

- Policy supports open access to publicly funded monocentric national studies and is reviewed annually by the Management Committee.
- Policy is published on the AIBILI website and all employees must comply.
- Management Committee ensures communication, monitors compliance, and enforces disciplinary action if needed.
- Directors and supervisors are responsible for making employees aware of the policy and enforcing compliance.
- Non-compliance may lead to disciplinary action.

8. Research Assessment and Evaluation

AIBILI commits to:

- a) Developing in cooperation with funding agencies, institutional departments and other appropriate units a framework for research assessment and evaluation that incentivizes research quality and Open Science behaviors and practices.
- b) Adopt open science metrics.

9. Training

- a) AIBILI commits to ensuring adequate and continual training of personnel to maintain and improve their competence on open science, including open access publishing, FAIR, open data, data management, research integrity, reproducibility, and transparency.
- b) Appropriate funding for these activities should be ensured and to that end synergies with Research Funding Organizations (RFOs) and other stakeholders should be sought.

10. Monitoring Policy Compliance and Validity of the Policy

This Policy is intended to support the organization's open access to Publicly funded monocentric national studies sponsored by AIBILI, performed at AIBILI Clinical Trial Centre and supported by an EDC system, and is reviewed annually by the Management Committee to ensure its effectiveness and compliance and published on the AIBILI website.

All employees must comply with this Policy and any associated guidelines or procedures.

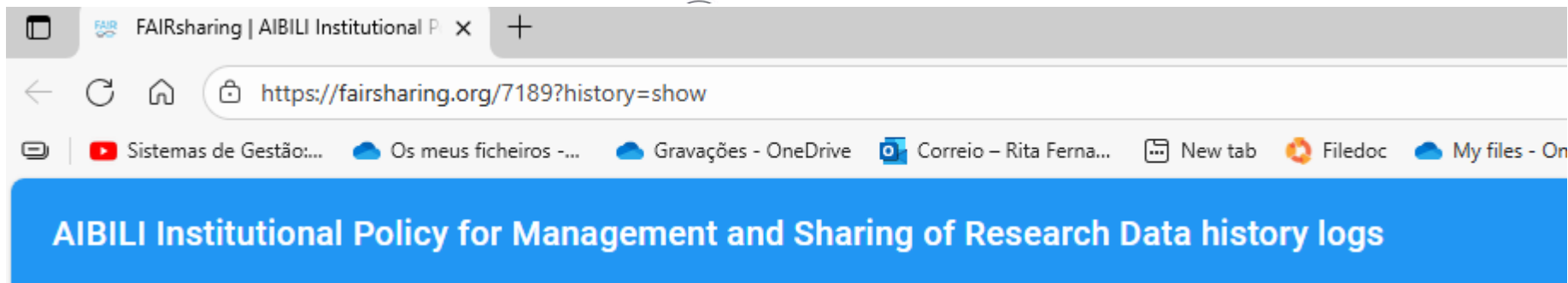
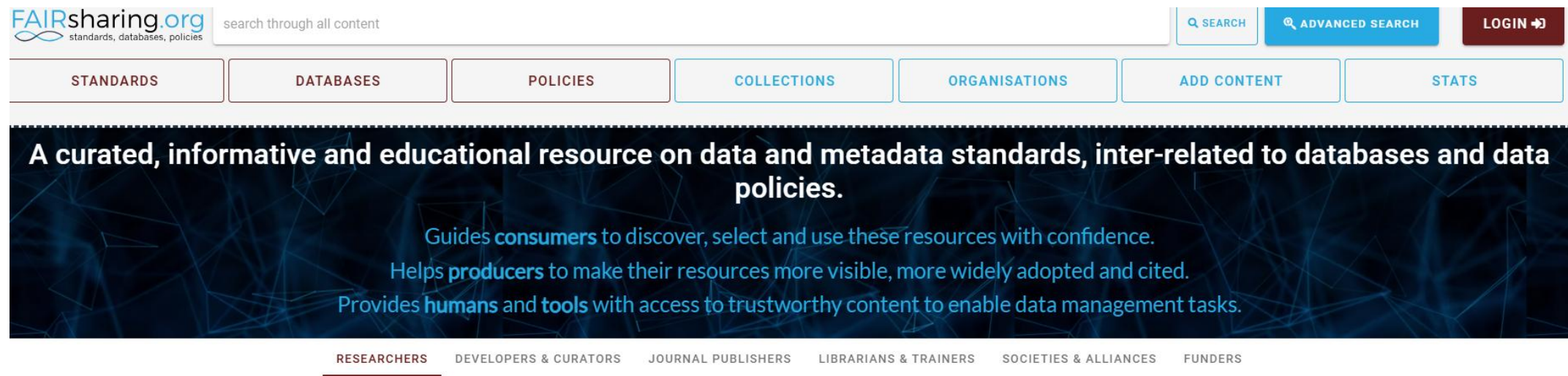
The Management Committee is responsible for ensuring that this Policy is communicated to all employees, and for monitoring compliance and enforcing disciplinary action where necessary.

Directors and supervisors are responsible for ensuring that their employees are aware of this policy and for enforcing compliance.

Non-compliance with this Policy and any associated guidelines or procedures, may lead to disciplinary action.

RI/00139/2024: POLICY STATUS

- Registered Fairsharing for DOI <https://fairsharing.org/>
- Waiting for feedback



THANK YOU - SHARE YOUR FEEDBACK!

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