

BIBLIOTECA DIGITAL OF IPB

PRESERVATION POLICY



VERSION 1

DATE: JUNE 2016

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1 GLOSSARY

The following terms frequently appear throughout this document

Repository. Information system supporting deposit operations, archive, preservation and dissemination of digital scientific information produced in IPB.

Instituto Politécnico of Bragança (IPB). Institution responsible for the Biblioteca Digital of IPB.

Administrator of Biblioteca Digital of IPB. Clarisse do Céu Pais. Person responsible for managing the repository.

FCT. Institution responsible for the supporting infrastructure to the repository operations.

RAD. IPB Teacher Evaluation System.

RCAAP. Scientific Repository of Open Access of Portugal.

SARI. Institutional Repositories Hosting Service.

DSpace. Electronic platform that allows to deposit, manage and disseminate scientific and intellectual output of an institution in digital format. It was also designed to enable long-term preservation of the contents of the repository.

2 PRESERVATION POLICY

2.1 MISSION OF THE REPOSITORY

The aim of the Biblioteca Digital of IPB is to disseminate and allow free access to scientific production produced by the academic community, promoting integration, sharing and visibility of scientific information and ensuring the preservation of the intellectual and scientific memory of IPB.

The community of interest of the repository consists of the following entities

- Governing and management bodies of the IPB and its members;
- Teachers, researchers, scholars, employees, students and any other persons linked to IPB;
- General public.

2.2 SCOPE AND OBJETIVES

The main objectives of the repository are:

- Organize systematically the materials resulting from scientific and technical production of the IPB;
- Contribute to raise awareness and increase the impact of research developed in the IPB;
- Allow continued access through the internet to scientific and technical production produced in IPB;
- Preserve in digital support the intellectual and scientific memory of IPB;
- Share the achieved scientific and technical knowledge by contributing to the generation of new knowledge;
- Actively participate as a partner in the joint effort of the national and international scientific community, in the field of open access institutional repositories.

In order to achieve these goals, IPB is responsible for ensuring the following values:

- Establish and ensure the necessary procedures for the preservation of digital content deposited therein by guaranteeing continued access thereto (for a minimum period of 5 years);
- Support and clarify doubts about the process of filling publications;
- Support in the clarification of issues related to copyright;

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- Provide usage statistics (queries and downloads) of the documents deposited in the Biblioteca Digital of IPB;
- Validate the metadata of documents ensuring their quality for the purpose of information retrieval and authenticity;
- Ensuring interoperability of the Biblioteca Digital of IPB with other systems and information services (RAD, Portal RCAAP, DeGóis, OpenAIRE, ORCID, etc.);
- Promote dissemination and training actions for users;
- Supporting important institutional initiatives aimed at maximizing the public benefit of scientific knowledge;
- Keep the page of the Biblioteca Digital of IPB updated.

The present document characterizes the preservation policy of the Digital of IPB as deposit and of documentation in digital format produced by the IPB. Notwithstanding their structural or situational specificities this policy is in line with the general policies and strategies of the IPB for the safeguarding, diffusion and continuous access to the scientific production of IPB.

A full understanding of the conservation strategies and plans adopted does not exempt the Reading of complementary documentation, namely:

- Procedural manuals;
- Strategic plans and budgets of IPB;
- Manual of functions and training plan;
- Hardware and software inventories;
- Contingency and disaster recovery plans;
- Architecture description and technological infrastructure;
- Legislation, standards and reference recommendations.

2.3 VALUES

A set of values underlies the definition of politics and digital preservation plan that the Biblioteca Digital of IPB adopt, namely:

- **Trust** by all stakeholders in particular authors and information consumers of the Biblioteca Digital of IPB. Trust is materialized in the certainty of the continuity of service provision, its quality and reliability of the available information.

- **Transparency** in the relationship with stakeholders by disseminating procedural information, as well as documents related to the system, preserving metadata and audit reports.
- **Rigorous** monitoring of the legislation which constitutes the legal framework support, standards, recommendations and best digital preservation practices in order to adapt the Biblioteca Digital of IPB to new situations.
- **Authenticity** of preserved digital objects and the ability to demonstrate them to any interested party, in terms of the preservation commitment assumed.
- **Accessibility** of preserved information, the ability to locate digital objects, retrieve them, view them, interpret their information content and evaluate its production and maintenance.
- **Usability** of preserved information, allowing its reuse and elaboration of derivative works.
- **Security** in preventive and corrective capacity in case of failure or attempted intrusion, both to safeguard the conceptual, physical and logical integrity of digital objects, as well as to guarantee access rights, reserve duties and intellectual property rights with which the repository commits itself.
- General **Quality** of the provided services, a commitment to constant monitoring of the different system components and conducting regular internal audits.
- **Innovation** applied to deposit functions, management and access, in a double commitment to system update against technological advances, and active participation, when appropriate, in research partnerships and development of new resources.

2.4 TECHNOLOGICAL AND INFORMATIONAL ARCHITECTURE

The Biblioteca Digital of IPB is implemented on the DSpace platform that makes it easy and quick to collect, describe, distribute and preserve documents in digital format. The Biblioteca Digital of IPB is organized in Communities (Schools) and sub-communities (Departments) and subdivided into Collections according to document type.

A Biblioteca Digital of IPB admits integration on proposals from interested parties of new communities and collections. The proposal of creation of new communities and collections must be submitted by the manager of the Biblioteca Digital of IPB, with its opinion to the President of IPB for decision.

2.5 LEGAL AND REGULATORY FRAMEWOK

The Biblioteca Digital of IPB operates according to the following legal and regulatory framework:

- Resolution of the Council of Ministers no. 91/2012 approving the National Digital¹ Interoperability Regulation;
- Decree-Law no. 52/2002, of March 2, which governs the national register of doctoral theses in progress, whose load is the responsibility of higher education institutions and is available on the Internet by the Ministry of Education and Science;
- Article 50 of Decree-Law no. 74/2006, of March 24, in the wording given by Decree-Law 115/2013 of August 7, determines that doctoral theses, as well as other works that under the law replace these in the process of obtaining doctor's degree, as well as master's dissertations, are subject to the compulsory deposit of a digital copy in a repository that is part of the Repository network Scientific Program of Open Access of Portugal, operated by the Foundation of Science and Technology, I.P.
- Order no. 14167/2015² - The list of authorized formats r the purpose of deposit in the Scientific Repository of Open Access (RCAAP) of the documents referred to in article 50 of Decree-Law no. 74/2006, of March 24, in the wording given by Decree-Law no. 115/2013, of August 7.
- Open Access Policy for Scientific Publications in the Biblioteca Digital of IPB³;
- Regulation of the Biblioteca Digital of IPB⁴;
- Good Practices Guide for Metadata Editors/ Local Administrators⁵.

2.6 POLICY REVIEW

The preservation policy now approved should be reviewed within a maximum period of three years, without prejudice to specific technical changes proposed by the manager of the Biblioteca Digital of IPB and approved by the President of the IPB.

¹ <http://dre.pt/pdf1sdip/2012/11/21600/0646006465.pdf>

² <https://dre.tretas.org/dre/2159741.dre.pdf>

³ <http://www.ipb.pt/go/i090>

⁴ <http://www.ipb.pt/go/f693>

⁵ <http://www.ipb.pt/go/f631>

3 DEPOSIT POLICY

In order for a document⁶ to be accepted by the Biblioteca Digital of IPB, it must comply with the following criteria:

- The document should be produced by members of the IPB;
- The document must necessarily have the membership of the IPB;
- The document must be of a scientific or technical nature;
- The document must be in digital format;

The document should be complete and in its final form, ready to be made available in accordance with the author's authorizations, the Open Access Policy of Scientific Publications in the Biblioteca Digital of IPB, the Policy on Open access to Scientific Publications resulting of R&D projects funded by FCT, H2020 and editorial policies;

- The authors, who make the deposit must be available and able to give the IPB the right to preserve and digitally distribute the document through the Biblioteca Digital of IPB, in accordance with the licensing and selected access restrictions;
- The document must comply with the established space limit (700 MB);
- Ensure that the documents deposited in the Biblioteca Digital of IPB fully comply with the applicable legislation, particularly in the field of intellectual property and personal data protection.

3.1 RIGHTS TRANSFER AGREEMENT

The digital preservation strategy used by the Biblioteca Digital of IPB requires digital actions to be applied to digital objects which, in certain situations, may entail their transformation or conversion into new formats or media. In order for the Biblioteca Digital of IPB to comply with its commitment to the long-term preservation of the documents entrusted to it, it's essential that sufficient control over the objects to be preserved is acquired.

As such, the incorporation of new documents into the repository is conditioned to the authors' acceptance of a rights transfer agreement allowing the repository to carry out

⁶ It is understood that the concept of document in its broadest archival sense, so, a "document" may be any digital object, e.g. a video, audio track or any other.

preservation interventions on the documents without violating any intellectual property rights.

Therefore the deposit of documents is conditioned on the authors' acceptance of a rights transfer agreement to maintain and make their documents accessible in digital form.

A copy of the license, currently in force, which must necessarily be accepted by the authors of deposited materials, either through self-archive or through administrative incorporation, can be found at: <http://www.ipb.pt/go/f693>

3.2 TRANSFER OF RESPONSIBILITY

The transfer of responsibility for the preservation of digital documents submitted to the Biblioteca Digital of IPB only materializes from the time the IPB formalizes the complete incorporation of the information, so, liability is transferred when, collectively, the following conditions are met:

1. The depositor of the document formally receives an email from the repository confirming that his deposit had been accepted;
2. The depositor is able to access and download the document through the graphical interfaces provided by the Biblioteca Digital do IPB.

When conditions cumulatively presented above are met, the repository assumes responsibility for the long-term preservation of the submitted document.

If the conditions above are not met, this means that the IPB did not assume responsibility for the preservation of the digital document or that it was rejected by the Biblioteca Digital of IPB. A rejection this kind, will always be accompanied by a justification by the Manager of the repository. This will result from the existence of at least one non-compliance relation to store the document acceptance criteria.

4 DIGITAL PRESERVATION PLAN

The Biblioteca Digital of IPB commitment for the preservation of deposited material therein comprises the continued access guarantee for a minimum period of 5 years and the reusability of digital objects under custody, without loss in their significant properties, thus ensuring their intelligibility and ensuring the ability to demonstrate their authenticity.

This general commitment to preservation concerns only the digital documents deposited and accepted by the repository. This commitment is based on a strategy focused on the following general principles:

1. Stinger for open formats;
2. Migration formats (whenever necessary);
3. Systematic procedures of technological surveillance of the external and internal environment to the repository;
4. Reinforced updating of the technological infrastructure;
5. Safety and security of data (e.g. backups);
6. Contingency plans to deal with emergencies, serious failures or disasters;
7. Succession plans to deal with situations of institutional rupture.

4.1 SIGNIFICANT PROPERTIES AND AUTHENTICITY

The conservation strategy adopted by the Biblioteca Digital of IPB circumvents the problem of technological obsolescence, but implies regular transformation of digital objects over time, a practice that could lead to loss of information.

Assuming a lossless preservation of commitment in the important properties of objects, being necessary to define which properties that the Biblioteca Digital of IPB considers necessary in each type of object to be preserved.

Table 1 – Significant properties for different classes of digital objects.

| Document Type | Examples | Significant properties |
|-----------------------|---|---|
| Text Document | Scientific article Editorial published in a journal Masters dissertation PhD Thesis Book or monograph Part or chapter of a book Annotations Posters/Abstracts Working papers Articles published in proceedings/conferences | Textual content Text formatting (fonts, bold, italics, underlined) Page size (width x height of pages) Number of pages Dimension of the margins Graphical layout of the various elements on the page Page background color Headers and footers Other elements considered relevant for the interpretation of the document. |
| Scientific data | Answers to Inquiries Data produced by measuring devices Experimental data Statistical data Numerical data | Informational elements Structure essential to the semantic decoding of data elements Metadata and other elements considered relevant for the interpretation of the document. |
| Video | Movies Interviews Documentaries | Video resolution (width x height of each frame) Pixel aspect ratio (pixel shape) Frame rate (speed at which frames are displayed) Audio that comes with your video Duration of the video Other elements considered relevant for the interpretation of the document |
| Audio | Music Interviews Radio recordings | Duration Number of channels Channel mapping (left vs. right) Frequency of sampling Bit depth Other elements considered relevant for the interpretation of the document |
| Two-dimensional image | Photos | Width and height in pixels Pixel colors Bit Depth (maximum number of colors) Number of pages (where applicable) |

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|------------------|--|---|
| | | Other elements considered relevant for the interpretation of the document. |
| Vector image | Logos Graphics | Colors Curves Open and closed polygons Points Objects Other elements considered relevant for the interpretation of the document. |
| Computer program | Computer games Software applications Compiled code Computational data | Functionality Interactivity Operational Performance |
| Others | To be defined case by case... | To be defined case by case... |

4.2 METADATA

In addition to the significant properties mentioned above, specific to each type of object to be preserved, there are diplomatic elements that the Biblioteca Digital of IPB also considers necessary to preserve (if existing), in particular to ensure the authenticity of the documents.

These elements, when not explicitly present in the contents of the objects, will at least be considered within the scope of the associated descriptive metadata. Currently, relevant catch elements are based on the DRIVER and OpenAIRE guidelines. These elements are:

| Metadata element | Description | Mandatory | Notes |
|-----------------------|------------------------|------------------------|-------|
| dc.contributor.author | Author of the document | Required | |
| dc.title | Title | Required | |
| dc.date.issue | Publication date | Required | |
| dc.language.iso | Language | Required | |
| dc.type | Document type | Required | |
| Others | Define case by case... | Define case by case... | |

4.3 PRESERVATION FORMATS

The choice of suitable formats for long-term preservation is a central component of the preservation plan of the Biblioteca Digital of the IPB and is expressed in two main actions:

- Standardization of formats of digital objects during the process of deposit or pre-deposit (i.e., migration by producers)
- Migration of formats for preservation or dissemination purposes;

The choice of the preservation formats of the Biblioteca Digital of IPB is governed by five main criteria:

1. **Possibility of access to format specifications** (i.e. open format);
2. **Integrated format development in the framework** of a **standardization body**, preferably international (i.e. standard format)
3. **Format capability assessment to accommodate the significant properties** of objects resulting from the application of conversion tests using differentiated converters, when they exist;
4. **There are multi-platform viewers** for the respective format, preferably in open-source;
5. **No legal restrictions** on the use and production of objects in this format (i.e., without associated royalties).

Table 2 defines the formats in which digital objects should be stored within the repository. This doesn't mean that these formats should be the ones of the deposited documents or the formats that will be served to the consumers/users of the repository. These are the formats in which the objects will be preserved inside the repository, existing, therefore, the possibility of performing migration formats to and from the repository.

Tabel 2 – Preservation formats.

| Document Type | Acronyms of authorized format | Technical designation of authorized format | Reference/notes |
|-----------------|-------------------------------|--|---|
| Text document | PDF/A | Portable Document Format/Archival | ISO 19005-3:2012 Document management - Electronic document file format for long-term preservation -- Part 3: Use of ISO 32000-1 with support for embedded files (PDF/A-3) |
| | RTF | Rich Text Format | https://www.microsoft.com/en-za/download/details.aspx?id=10725 |
| Scientific data | CSV | Comma-Separated Values | http://tools.ietf.org/html/rfc4180 |
| | XML | Extensible Markup Language | http://www.w3.org/XML/ |
| | ODS | Open Document Spreadsheet | ISO/IEC 26300 -1:2015 — Open Document Format for Office Applications (OpenDocument) v1.2 http://www.iso.org/iso/home/store/catalogue_tc/catalogue_detail.htm?csnumber=66363 |
| | JSON | JavaScript Object Notation | http://json-schema.org/latest/json-schema-core.html |
| | RDF | Settings File (Resource Description Framework) | filext.com/file-extension/RDF |
| | TXT | Text File | https://en.wikipedia.org/wiki/Text_file |
| Video | MPEG-2 (H.222/H.262) | MPEG-2 | http://www.iso.org/iso/home/store/catalogue_ics/catalogue_detail_ics.htm?csnumber=44169 |
| Audio | WAV | Waveform Audio File Format | https://pt.wikipedia.org/wiki/WAV |

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|-----------------------|--|------------------------------|---|
| | MP3 | MPEG Audio Stream, Layer III | https://en.wikipedia.org/wiki/MP3 |
| Two-dimensional image | TIFF uncompressed | Tagged Image Format File | http://partners.adobe.com/public/developer/tiff/ |
| Vector image | SVG | Scalable Vector Graphics | http://www.w3.org/Graphics/SVG/ |
| | EPS | Encapsulated PostScript | https://partners.adobe.com/public/developer/en/ps/5002.EPSE_Spec.pdf |
| Computer program | Original format but accompanied by user manual, installation and technical requirements for its implementation | | To be supplied by the author. |
| Others | Original format | Original format | Any omission, the repository can only ensure the preservation of the logical level of the object, offering no guarantees of continued access to their semantic content. |

5 SUCESSION PLAN

A trustworthy repository ensures continued access to the information it has been entrusted with. The cessation of activity by any of the institutions involved in the creation, implementation and maintenance of the Biblioteca Digital of IPB jeopardizes the access to preserved digital objects. The cessation of activity may be caused by different reasons, such as, a lack of financial resources to ensure the necessary investments to carry out actions of safeguarding information, allocation of technical support staff for repository operations, renewal of vital system components, change of strategy by the IPB, legal imposition, natural disaster, among others.

In a context of the cessation of activities by any of the entities involved in the preservation of the digital information of the Biblioteca Digital of IPB, actions will be implemented to ensure the continuity of the service with as little interruption as possible.

The following scenarios describe the actions to be developed, the responsibilities and criteria for activating the succession plan in case of cessation of the activity by one or more organizations responsible for the continuity of the service.

Organizations responsible for providing the service are:

1. IPB – responsible for the operation of the Biblioteca Digital of IPB. Its contractual obligations include, but are not limited to:
 - a. Indicate the name of the person in charge of the IPB and, at least one responsible for the repository as well as a technical contact;
 - b. Promptly report a change in the identity of any of the contacts mentioned in the previous paragraph;
 - c. Create and manage a specific e-mail account for the institutional repository;
 - d. Report to FCT/FCCN about any kind of change which affects the functioning of the institutional repository;
 - e. Keep in the list of administrators of the institutional repository an element of the RCAAP of FCT/FCCN team to support the management of the repository and perform technical verifications of the system;
 - f. Manage the repository according to the instructions defined by the FCT/FCCN in the RCAAP Project, in particular with regard to the

- rules/guidelines that allow interoperability of the repository and regularize nonconformities within 60 days after the notice;
 - g. Ensure good practices in marking the metadata of institutional repository records.
2. FCT – responsible for the infrastructure supporting the operations of the Biblioteca Digital of IPB. Its contractual obligations include, but are not limited to:
- a. Install and maintain up-to-date the required DSpace software to host the institutional repository of the adherent entity hosted at SARI;
 - b. Install and manage the unique address system (Handle System) and support the respective costs; (Assured by the IPB, until 2018)
 - c. Install a security certificate provided by the adherent entity;
 - d. Host and provide the institutional repository of the adherent entity in an operational infrastructure, ensuring service availability in 99% of the time.
 - e. Perform constant platform monitoring and trigger the necessary alarm for the rapid correction or analysis of detected nonconformities;
 - f. Configure the presentation (layout) and structure of the institutional repository of the adherent entity according to the information provided by the entity and within the technical limits of the application;
 - g. Make daily backups of data associated with the institutional repository of the joining entity;
 - h. Ensure a helpdesk service for troubleshooting and queries about the repository system and the search portal, running on weekdays from 9:00 a.m. to 6:00 p.m., through e-mail, with a one-hour response time and intervention time for critical and malfunctioning requests, three hours for urgent requests and 24 hours for the remaining claims;

5.1 SCENARIO 1 – IPB CEASES ACTIVITY

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| Scenario description | IPB ceases to exist, abandons the goal of maintaining or the ability to manage the Biblioteca Digital of IPB. It does not glimpse the possibility of such skills being transferred to another institutions (as in case of a merger) |
| Activation criteria | The IPB is unable to comply with the obligations established in the contract of adhesion to SARI, not being able to envisage that, in short term, they will be able to correct this situation |

| | |
|-------------------------|---|
| | <p>When detecting an irregular situation, the FCT should send a warning to the manager of the Biblioteca Digital of IPB, informing of the detected irregularity, and granting a deadline for correction. If the deadline is exceeded, FCT reserves the right to activate the succession plan.</p> |
| Action plan | <p>FCT assumes the responsibility of data preservation of the Biblioteca Digital do IPB, however, it is maintained as it is, i.e. the repository stops accepting new deposits, maintaining only its preservation function and the dissemination of the existing content.</p> <p>FCT reserves itself the right to reorganize the data including the migration of orphaned content to another repository, removed from the original institution branding.</p> |
| Responsibilities | <p>FCT is responsible for detecting the breakdown situation by monitoring the compliance of contractual terms by the Biblioteca Digital of IPB</p> <p>The Biblioteca Digital manager is responsible for responding to the notice sent by FCT and submit a recovery plan for the reported situation.</p> |

5.2 SCENARIO 2 – FCCN/FCT CEASES ACTIVITY

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|------------------------------------|---|
| <p>Scenario description</p> | <p>FCCN/FCT ceases to exist, abandons the goal of maintaining or lose the ability (technical, legal or financial) to fulfill the considered vital functions for the correct functioning of the Biblioteca Digital of IPB.</p> <p>Cumulatively, it is not envisaged that these functions could be transferred to another institution (in case of a merger).</p> |
| <p>Activation criteria</p> | <p>The functions which the FCT is committed with in the contract of adhesion to SARI are not being carried out. Due to this fact, the Biblioteca Digital of IPB is no longer able to fulfill its mission adequately.</p> |
| <p>Action plan</p> | <p>The manager of the Biblioteca Digital of IPB, together with the top manager of IPB, must terminate the SARI membership agreement and require the data to be returned to the source, in accordance with the provisions defined in the contract⁷.</p> <p>It will then be up to the IPB to reactivate the repository using internal resources or external suppliers in the shortest time possible.</p> |
| <p>Responsibilities</p> | <p>The manager of the Biblioteca Digital of IPB is responsible for detecting the breakdown by the FCT. The top manager of the IPB should be informed and should make the decision to activate the succession plan.</p> <p>FCT is responsible for providing access to the data and metadata of the repository, as well as assisting in the process of reactivating the repository (if it's still possible).</p> |

⁷ Currently the Biblioteca Digital of IPB is located in a virtual machine (VM). The same can be transferred to the IPB or to a service provider indicated by the Biblioteca Digital. This procedure was successfully tested under the TIMBUS project.

5.3 SCENARIO 3 – IPB AND FCT CEASE ACTIVITY

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|----------------------|---|
| Scenario description | Both IPB and FCT cease to exist, they lose the goal of maintaining or the ability to manage the Biblioteca Digital of IPB. Cumulatively, these functions can't be transferred to another institution. |
| Activation criteria | The Biblioteca Digital of IPB is no longer able to fulfill the mission to which it is proposed to and both the IPB and the FCT are unable to ensure the regularization of the situation. One of the hierarchically superior institutions (eg Ministry of Science, Technology and Higher Education) must detect the situation and activate the succession plan. |
| Action plan | The Biblioteca Digital of IPB, all its contents and values must be transferred to a viable one, indicated by the guardianship. |
| Responsibilities | <p>The hierarchically superior institution to the IPB or the FCT is responsible for detecting the institutional breakdown situation, collect data from all repositories and contact the host institution.</p> <p>A The host institution is responsible for developing all necessary actions to reactivate the various repositories in new infrastructure, using internal resources, or hiring external suppliers.</p> |

The provisions set out in this document shall enter into force on the following day of its approval.