PEP Open Access and Data Management Policy

Preamble

PEP's mission is to build research capacity in the South and to put this capacity to work where it is most needed. PEP trains local researchers to apply cutting-edge methodologies to analyse key economic and social policy challenges in developing countries. PEP recognizes the role scientific research plays in addressing diverse development challenges and acknowledges that published publicly-funded research results should be disseminated widely to benefit a broad range of users.

Guiding Principles

Among PEP's guiding principles is the view that its research outputs should be made available to the public in an **accessible**, **reusable**, **timely** and **complete** manner. This view is shared by PEP's donors and aligns with the tenets of the Open Access Movement: to provide free online access to intellectual outputs generated by research.

General Considerations

While PEP will make every effort to make all information Open Access, this will be subject to any applicable legal rights and legitimate interests of stakeholders and third-party rights, intellectual property rights, confidentiality, costs, sensitivity, and subjects' rights and privacy obligations.

Due regard will be given to users in developing countries with low bandwidth by designing easily accessible products.

Scope and Data Repositories

PEP is committed to maximizing opportunities to make its research outputs available for free through PEP's own open access repository, which is listed under OpenDOAR, and PEP's main donor repositories. PEP makes the following information products available; refer to Annexes I and II for guidelines:

1. Peer-reviewed journal articles.
2. Reports and other papers.
3. Books and book chapters.
4. Data and databases.
5. Data collection and analysis tools (models, survey tools).
6. Video, audio and images.
7. Computer software.
8. Web services (e.g. data portals, modelling online applications/training materials.
9. Metadata associated with the information products above.

PEP Open Access Practices

PEP will prepare all datasets collected using PEP funding to provide them to the public on an open access basis through Creative Commons. Following their publication on PEP's open access repository, all metadata and publications can be freely accessed.

Policy Revision

This policy will be reviewed regularly in order to respond to changes by donors or PEP internal policies to the Open Access Policy.

ANNEX I: PEP OPEN ACCESS AND DATA MANAGEMENT GUIDELINES

PEP will prepare all information products and datasets collected using PEP funding to provide them to the public on an open access basis through Creative Commons. Openness will be subject to any applicable legal rights and legitimate interests of stakeholders and third-party rights, intellectual property rights, confidentiality (including anonymization), costs, sensitivity, and subjects' rights and privacy obligations.

Content (information products listed below) will be deposited into repositories—as listed on the PEP website—in full as soon as possible after an item is complete or in its final form. Data and data sets will be made available within 12 months of the publication of the working paper.

Types of Information Products
Data and data sets
Peer-reviewed journal articles
Reports and other papers
Books and book chapters
Video, audio, scientific images
Computer software, applications, and code
Websites (e.g. data portals, modelling online applications, training materials, etc.)
Metadata for all information products above

STEPS TO ACCESS THE DATA

A list of datasets and instructions for accessing them will be made available on the PEP website.

Data will be provided free on request through the following steps:

1. The requesting researcher must complete the "Request Form for Access and Use of PEP Data" and submit this to info@pep-net.org for processing. The form requires information on the objectives for using the data and outlines the conditions of use of the data.

2. Upon approval of the request, PEP will send the requested data to the researcher. PEP cannot refuse any request without providing the requesting researcher with written, reasonable justification.

www.pep-net.org

ANNEX II: REQUEST FORM FOR USE OF PEP DATA

DATA USER details
Full name:
Position and affiliation:
Full address:
Phone number:
Email:
Objectives for using data (minimum 100 words):

Funding source (if applicable):

Database requested:

The **DATA USER** is made aware of and agrees to be bound by the following conditions regarding the use of PEP data:

1. The **DATA USER** shall submit to PEP the signed version of this conform form before PEP provides her/him the requested.
2. PEP data that will be provided to the **DATA USER** shall only be used for the objectives above. Under no circumstances shall the **DATA USER** sell or lend the entire dataset or any part thereof to any other data user. The **DATA USER** is given full responsibility to safeguard the data from unauthorized access or use.
3. Any document, paper or report which emanates from the use of PEP data shall give appropriate acknowledgement to PEP and the relevant PEP researcher.
   '*This work was carried out with data provided by the Partnership for Economic Policy (PEP). PEP receives funding from the Department for International Development (DFID) of the United Kingdom (or UK Aid), and the Government of Canada through the International Development Research Centre (IDRC).*'
4. Upon completion of the study, the **DATA USER** shall furnish PEP with soft copies of all papers or reports produced using PEP data as soon as possible and no later than six weeks after production.
5. After notifying the researcher—who cannot object without written, reasonable justification—PEP has the right to include the papers or reports making significant use of PEP data in its working paper series, and to make the results and reports or papers available online through its website.
6. PEP shall not be held responsible for any error or wrong information obtained by the **DATA USER** as a result of processing using PEP data.

I hereby agree to the terms and conditions stated above.

User: Approved by:
Signature _____   Signature _____
Date: Date: