# Ontological analysis of FAIR Supporting Resources

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#### Abstract

Aligning with the FAIR Principles is a key requirement for European-funded research. However, different interpretations of the FAIR Principles lead to diverging evaluations of how to implement them. Previous research introduced the FAIR Implementation Profile (FIP) as a driver to accelerate broad community convergence on FAIR implementation options. To scale FIP creation and analysis, we established a decentralised socio-technical ecosystem, supported by a lightweight FIP ontology including a typology of FAIR Supporting Resources (FSRs). However, categorising FSR instances is sometimes challenging, suggesting that there are unclarities in the FSR type definitions. This paper presents an ontological analysis of the FIP ontology, aiming to improve its accuracy in supporting the peer-reviewed qualification process of FSR descriptions provided by a wide community of FIP users. Using the Unified Foundational Ontology (UFO) as a reference, we analysed class definitions and demonstrated UFO's capability to resolve controversies leading to disambiguation of FSRs of type FAIR Specification and FAIR Practice.

#### Keywords

FAIR Principles, FAIR Implementation Profiles, ontology analysis

### 1. Introduction

The FAIR Principles [1] have gained growing attention in global research over the last decade as the means to make data Findable, Accessible, Interoperable and Reusable. In recent years, making data FAIR has become a common requirement for securing research funding in Europe [2]. Despite these signs of uptake, the FAIR Principles leave ample room for interpretation on

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how to implement their requirements, making both funders and research communities uncertain about these new mandates [3, 4].

To make FAIRification more systematic and efficient, the GO FAIR Foundation (GFF), in collaboration with the ENVRI<sup>1</sup> initiative, developed a questionnaire-based approach to capture community-specific *FAIR Implementation Profiles (FIPs)* [5]. A *FIP* is a list of declared technological choices intended to implement each of the FAIR Principles, made as a common decision by the members of a community. By making these declarations openly accessible and FAIR, they become a driver for broad community convergence on the optimal reuse of these resources [6]. *FIPs* have become increasingly widespread with more than 200 published profiles and 100 registered communities<sup>2</sup>.

These developments require up-scaling approaches to FIP creation, dissemination and analysis. In recent years, a decentralised, socio-technical ecosystem supporting the composition of FIPs, their representation, qualification (formal peer-review) and discovery has been developed. The core of this ecosystem is a lightweight FIP ontology<sup>3</sup> including a typology of FAIR Supporting Resources (FSRs). FSRs are resources that support the FAIRification process. FSR subclasses represent resource types that are essential to implement the FAIR Principles, the so-called FAIR Enabling Resources (FERs), instances of which are used to compose a particular FIP. Creating a FIP is not a trivial task and it is advisable to get support from a FAIR expert. To guide communities in going FAIR, GFF has developed a Three Point FAIRification Framework (3PFF) with an associated Capacity Building Programme to train data stewards on how to facilitate FIP events with the participation of interested communities of practice [7]. In these sessions, FIP users will be guided in providing descriptions of existing FSR instances of their choice and in classifying them into the appropriate FSR types.

Therefore, to improve the common understanding of FIP-related concepts, this paper aims to start an ontological analysis of the *FIP* ontology, focusing on resolving classification issues within some *FSR* types. By refining these definitions, the FIP ontology should be better suited to serve as a semantic layer for providing a reference knowledge base *FSRs*.

The paper is further organised as follows: Section 2 provides background information on related work for landscaping the communities' infrastructure and for ontological analysis aimed to clarify its representation; Section 3 describes the components of the *FIP* ecosystem; Section 4 explains the FIP ontology; Section 5 analyses detected qualification challenges of community-provided *FSR* instances; Section 6 exemplifies, using the FSR for Research Object Crates, how ontological analysis can help reveal ontological shortcomings and how to resolve them; Section 7 concludes with a future outlook and next steps.

# 2. Background information

The *FIP* approach is accompanied by the definition of resource classes explicitly designed to address each of the FAIR Principles. This was preceded by a thorough analysis of the FAIR Principles by considering how various aspirational FAIR behaviours might be instantiated

¹https://envri.eu

<sup>&</sup>lt;sup>2</sup>http://v2.fairconnect.pro/dashboard

<sup>&</sup>lt;sup>3</sup>https://w3id.org/fair/fip

in different types of (mostly existing) resources. The type definitions of the FERs follow the interpretations published on the GFF website<sup>4</sup>, which are based on an analysis made with the involvement of a broader expert community [4]. The FER types proposed for FIPs rely largely on the provided examples in the implementation considerations of this work. Nonetheless, the FIP questionnaire sometimes deviates from the suggestions of [4] by using a more practical approach to guide the user in the choice of technology. The most obvious change in the FIP approach is the interpretation of R1.3, which considers the FIP itself as a list of community-specific standards. Other interpretations come to different conclusions on the recommendations to be given to data providers to make their data FAIR. For example, Buttigieg [8] advises to use resources similar to FERs for some principles, but for others they provide more generic guidelines addressing the method rather than suitable resources. Another interpretation is provided by [9] using OntoUML to design a FAIR Principles Schema. While the FIP approach identifies enabling resources to achieve a certain FAIR behaviour, Bernasconi et al. [9] analyse the behaviour itself for potential improvement. For example, for F1 it suggests that data should be equipped with globally unique and persistent identifiers, while the FER type associated with F1 in the FIP is Identifier Service, which provides for any digital object (1) algorithms guaranteeing global uniqueness, (2) a policy document that guarantees persistence and (3) resolution of the identifier to machine-actionable metadata describing the object and its location<sup>5</sup>.

By providing FIPs, communities contribute to a knowledge base of FSRs, which can be found and reused by other interested parties. To be findable, the resources must be described following an agreed pattern and classification. Note that repositories for collecting community standards and technologies are being offered by FAIRSharing<sup>6</sup> [10] and recently also by FAIR-IMPACT<sup>7</sup>. GFF makes an effort to interoperate with both by including references to the respective records. While the value of FIPs for facilitating the FAIR onboarding of communities has been repeatably demonstrated [11-15], the FSR instances provided by the user community lead sometimes to unresolved discussions in their qualification process, requiring compromises. This suggests that there are unclarities and imprecisions in the current definitions of the FSR types. FER instances can sometimes fall into more than one class making it a challenge to properly classify these resources. In this paper, we chose to use the Unified Foundational Ontology (UFO) as a reference for conducting an ontological analysis [16] of the FIP ontology. UFO supplies basic concepts for objects and events, their classification, relations and attributes, and helpful tools are available to do this type of analysis, like the OntoUML Visual Paradigm plugin. With UFO, we have secured to uncover important conceptual distinctions that would be otherwise ignored in informal characterisations of the different types of FSRs. Furthermore, we tried to identify important properties to be defined in the metadata schemas for describing the instances of different types. However, a key challenge is to maintain backward compatibility within the system, to ensure that legacy FIPs and existing users can continue using it without disruption.

<sup>&</sup>lt;sup>4</sup>https://www.gofair.foundation/interpretation

<sup>&</sup>lt;sup>5</sup>https://w3id.org/fair/fip/terms/Identifier-service

<sup>&</sup>lt;sup>6</sup>https://fairsharing.org/

<sup>&</sup>lt;sup>7</sup>https://catalogue.fair-impact.eu/

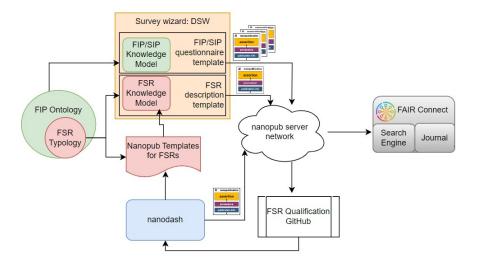


Figure 1: FIP Ecosystem: Overview of involved components.

### 3. FIP ecosystem

To support the creation of FIPs, the "FIP questionnaire" was compiled, which is a set of questions covering the FAIR Principles, with the answers identifying resources enabling the FAIRification of (meta)data. FAIR answers to these questions are given by means of a FIP ontology, which semantically defines the different types of resources empowering the FAIRification work. Initially it described resources essential in enabling the FAIR Principles (FERs), but it was expanded to include all resources supporting the FAIRification process, using the broader FSR type. Using a similarly conceived "SIP questionnaire", these resources can be compiled into a Semantic Implementation Profile (SIP). We developed the following collaboration tools to leverage the FIP ontology (see Figure 1):

- Nanopublications [17] are small, machine-readable RDF knowledge graphs, composed of an assertion and its provenance and publication metadata. They are persisted in the distributed nanopub server network [18], and reachable through a trustworthy, non-corruptible and persistent URI. In [19], nanopublications are discussed as valid FAIR Digital Object implementations. The nanopublication schema<sup>9</sup> enables tools like nanodash<sup>10</sup> and the survey wizard (see below) to use the nanopub infrastructure as a publication mechanism.
- The *survey wizard* hosts, as the FIP<sup>11</sup> and SIP<sup>12</sup> Wizard, are two Data Stewardship Wizard (DSW) instances, that make use of knowledge models based on the FIP Ontology, allowing the creation of respectively *FIPs* and *SIPs* and their publication to different formats,

<sup>8</sup>http://bit.ly/FIPminiquestionnaire

<sup>9</sup>http://www.nanopub.org/2024/WD-guidelines-20240419/

<sup>10</sup> https://github.com/knowledgepixels/nanodash

<sup>11</sup> https://fip-wizard.ds-wizard.org/

<sup>12</sup> https://sip-wizard.ds-wizard.org/

including nanopublications.

- The FSR qualification GitHub repository<sup>13</sup> provides an environment for curating FSR descriptions. A Github action<sup>14</sup> automatically lists new FSR nanopublications, which are then reviewed by at least two GFF trained FAIR experts, following well-documented qualification guidelines and a process of iterative improvements. The qualification process assesses the usefulness of a resource in its function to FAIRify data, and verifies its correct alignment to the appropriate FSR classes based on their definition in the FIP ontology, but does not assess the degree of FAIRness. A successful review leads to a qualification nanopublication (using a dedicated template<sup>15</sup>) and a qualification badge being assigned in the wizard. This process helps prevent duplication, inadequate descriptions, unhelpful FSRs, and maintains the integrity of the FIP approach. In addition, the process is documented, providing an invaluable insight into the debates and diverging interpretations leading to the final FSR classifications.
- *FAIR Connect*<sup>16</sup> acts as an index and search engine for finding published *FSRs*. The search results include metadata information, such as the GFF qualification status and popularity with *FAIR Implementation Communities (FICs)*.

## 4. FIP Ontology

The FIP ontology, as shown in Figure 2, was conceptualised in 2020, introducing five main classes and associated properties in the FIP ontology. At the core of the ontology is the FIP Declaration class that states that a FIC declares the use of a FER. The FIP Declaration refers to a FIP Question that refers to a FAIR Principle. FERs are essential to the operationalisation of the FAIR Principles, providing the functions needed to achieve some aspect of FAIR behaviour. By request of the ENVRI communities, we introduced a more flexible representation of the FERs, allowing the description of available FER and FER in development as sub-classes of FER to reflect the rapid developments in the area of FAIR implementation. In alignment with these two sub-classes, we introduced flexible properties to define the use of these FERs: next to declares-current-use-of, which must be an available FER, one can declare-planned-use-of a FER, which should be accompanied by a declares-planned-replacement-of a FER. Each FIP Declaration is complemented by the data type property considerations to allow the description of the community requirements and constraints that led to the implementation choice.

Figure 3 gives an overview of the types of *FERs* used to address each of the principles, which can be grouped into three main types: services, specifications and policies. However, in practice, an *FER* instance can encompass multiple subtypes within one parent type, like DCAT<sup>17</sup>, which is a specification for a *Metadata Schema*, *Structured Vocabulary*, a *Semantic Model* and a *Provenance Model*.

 $<sup>^{13}</sup> https://github.com/gofair-foundation/fsr\_qualification$ 

<sup>&</sup>lt;sup>14</sup>https://github.com/gofair-foundation/qualification-issue-creation-action

<sup>&</sup>lt;sup>15</sup>https://nanodash.petapico.org/publish?6&template=https://w3id.org/np/RApEyTXPOt\_h81Ao0WpzRhigcgvqrbnNBCo8fEpsZ6CxU

<sup>16</sup> https://fairconnect.pro/

<sup>17</sup>https://www.w3.org/TR/vocab-dcat-3/

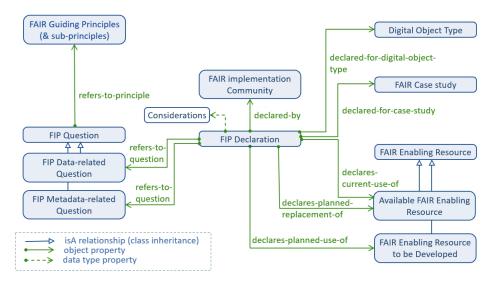


Figure 2: Core classes of the FIP Ontology

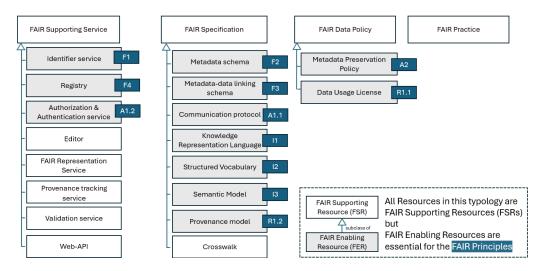


Figure 3: FAIR Supporting Resources versus FAIR Enabling Resources.

To provide more information about instances of the different FSR types, metadata templates in nanodash and corresponding metadata description templates in the DSW are provided. We used core metadata elements for all types like rdfs:label, rdfs:comment, rdf:type, and rdfs:seeAlso, plus specific elements for each of the types to better describe their particular features. For example, in the nanopub template for *identifier services*, we added the predicate *implements* using the object property URI http://usefulinc.com/ns/doap#implements to define which specification the service is based on. In this way, the templates enable relationships between *FSR* nanopublication instances.

The EOSC Association's Semantic Interoperability Task Force designed a survey to capture the

semantic interoperability practices from across different communities of practices, consequently the FIP ontology was extended with additional concepts and relationships to address semantic interoperability aspects [20]. The SIP application of the ontology adapted the FIP Declaration concept to SIP Declaration, by introducing two new optional relations with the associated objects: declared-for-case-study with range: FAIR case study and declared-for-digital-object-type with range: Digital Object Type. These relations were then also taken up in the FIP approach, as providing explicit choices for a specific digital object type makes the profile more meaningful. In terms of the FSR types included, the SIP focuses on Metadata Schemas, semantic artefacts (which include Structured Vocabularies and Semantic Models), Provenance Models, but also on Crosswalks (e.g., mappings between schemas). In addition, it uses services for the generation, transformation, and validation of resources, such as Editor, Validator Service, FAIR Representation Service, Web API, provenance Tracking Service. FAIR Practice was introduced as a class for representing combinations of specifications and services. These new classes required an extension of the FIP ontology beyond the FER typology, introducing the FSR as a superclass with FAIR Supporting Services and FAIR Specifications as main subclasses. For completeness, it should be noted that the FSR typology includes other classes, such as, e.g., FAIR Data Stewardship Event, which are ignored here since they are beyond the scope of this paper.

### 5. FSR qualification challenges

Considering that the *FIP* is a collection of community-selected (or -created) resources that provide the answers to the various FAIR Principles, and an *FSR* can be any resource created in any context, it is understandable that achieving a straightforward one-to-one correspondence between principles and resources is more of an exception than a norm. This is not inherently problematic (after all, FSRs can provide -sometimes partial- solutions to multiple FAIR concerns), but it does lead to ambiguities, for instance when FSR types with potentially competing scopes are combined. The assignment of *FSR* types is currently subjective and disagreements can occur, which becomes evident in the peer-review qualification process documented as GitHub issues.

An FSR that showcases this phenomenon is Research Object Crate (RO-Crate)<sup>18</sup>, as reported in GitHub issue 119<sup>19</sup>. A nanopublication for this FSR is available<sup>20</sup>, and the GitHub issue also points to an existing duplicate which has only Metadata Schema listed as its FSR type. Both nanopublications were authored by the same individual, so the nanopublication with the older date should have been replaced with the newest one. The latter describes RO-Crate as a Metadata Schema, Structured Vocabulary and Semantic Model, which is entirely justified, because, as pointed out in the documentation<sup>21</sup>, the metadata schema is defined in JSON-LD, reusing schema.org vocabularies and includes qualified relations to other standards like Portland Common Data Model<sup>22</sup> and Dublin Core Terms<sup>23</sup>. As argued by the lead of this paper (GitHub user mabablue), additional types should be included in the description:

 $<sup>^{18}</sup> https://www.researchobject.org/ro-crate/\\$ 

<sup>19</sup> https://github.com/gofair-foundation/fsr\_qualification/issues/119

<sup>&</sup>lt;sup>20</sup>http://purl.org/np/RAcYMfIt1ICpNTg0RCiR0QHfNoSUU-b-5Yw3w06HSL9VA

<sup>&</sup>lt;sup>21</sup>https://www.researchobject.org/ro-crate/1.1/structure.html

<sup>&</sup>lt;sup>22</sup>https://pcdm.org/2016/04/18/models

<sup>&</sup>lt;sup>23</sup>https://www.dublincore.org/specifications/dublin-core/dcmi-terms/

- 1. *Provenance Model* ,as also described in the RO-Crate project in the FIP Wizard<sup>24</sup> created (but not yet available as a nanopublication) by Stian Soiland-Reyes<sup>25</sup>, who is a co-developer of RO-Crate:
- 2. Metadata-Data Linking Schema, as RO-Crate packages research data with their metadata.

When all categories apply, the categorisation might lose its usefulness. On the other hand, specifications can include all these different aspects, as it applies in the example given. However, when constructing a specification type FSR, it is best practice not to mix FAIR Supporting Services and FAIR Specification. A potential alternative is to consider the RO-Crate specification to be a complex FSR, composed of multiple sub-FSRs with their own types. Another option would be to categorise the RO-Crate approach as a FAIR Practice, which suggests the combined use of a set of FSRs to reach a FAIRification goal.

## 6. Ontological analysis of the FSR typology

The FIP ontology started with twelve FSR types focusing on the implementation of the FAIR Principles. However, it gradually expanded over time, driven by requests of the communities of practice. This expansion requires refinement to provide clear descriptions of *FSRs*, and to ensure interoperability with existing relevant semantic artefacts. Not refining the ontology bears the risk of inconsistencies, inaccuracies and/or bad practices creeping into its application for FSR descriptions. To mitigate this risk, we performed an ontological analysis focusing on some aspects of the FSR typology, based on the Unified Foundational Ontology (UFO) [21]. A foundational ontology defines a system of domain-independent categories and their relations, providing a means for semantic clarification of a subject domain. Conducting ontological analysis involves the definition of mappings between modelling constructs (the *FIP* ontology) and the concepts in a reference ontology (UFO) to identify ontological shortcomings, such as construct excess (no mapping possible), overload (a single modelling construct can represent multiple ontological concepts), redundancy (multiple modelling concepts can represent the same ontological concept) and deficit (lack of expressivity of the modelling language to represent relevant phenomena in a domain) [22].

The parts of UFO [21] used in our analysis comprise three layers<sup>26</sup>: UFO-A, an ontology of Endurants such as Objects, Qualities, Relators, and Dispositions; UFO-B introduces Perdurants like Events and the relations between enduring and perduring individuals; and UFO-C, which specialises the other two layers focusing on social aspects of reality including notions for Plans, Goals, Agents, Commitments, and Normative Descriptions (see Figure 4 - from [23], pages 267-268).

UFO makes a fundamental distinction between Individuals, which are entities existing in reality with a unique identity, and Universals, which are abstract patterns of features that can manifest in various individuals. Unlike Perdurants, Endurants are individuals that are wholly present whenever they are present. Substantials are existentially-independent Endurants, whereas Moments are individuals dependent on their bearers. Substantial Universals are

 $<sup>^{24}</sup> https://fip-wizard.ds-wizard.org/wizard/projects/c8e39b76-8964-4222-b41b-d3bc83f8193b$ 

<sup>&</sup>lt;sup>25</sup>https://orcid.org/0000-0001-9842-9718

<sup>&</sup>lt;sup>26</sup>To improve the readability of the notions used we apply different styles: UFO concepts and «meta-properties»

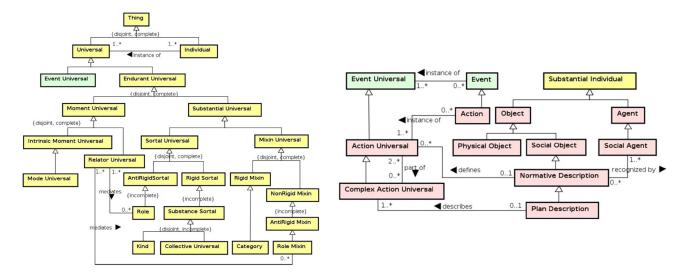


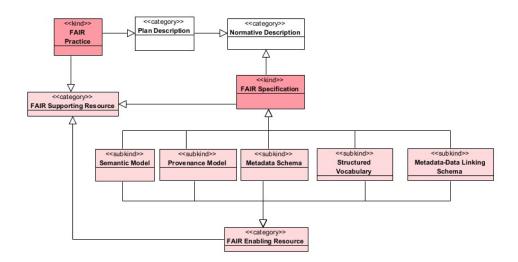
Figure 4: A fragment of UFO-A (yellow), UFO-B (green) and UFO-C (pink)

kinds of universals whose individuals are substantial individuals [21]. Based on UFO's theory of types there is an essential difference between Sortals and Non-Sortals:

«Sortal universals» are Substantial Universals that embody a principle of identity for their individuals. «Kinds» are rigid sortals in case this also applies to its instances, and «Collective Universals» represent collections of individuals with homogeneous structure. «Phases» and «Roles» are anti-rigid specialisations of identity providers, the first are influenced by changes in intrinsic properties (e.g., teenager, adult), and the latter are relationally dependent «Sortal Universals» (e.g., student, professor). In contrast, «Mixin Universals» are universals that do not carry a unique principle of identity for their instances, as they can be of multiple kinds. «Categories» represent rigid and relationally independent mixin universals that aggregate essential properties common to different kinds. «Role Mixins» represent anti-rigid and relationally dependent non-sortal universals that aggregate properties common to different roles.

UFO-C [24] differentiates between Agents and Objects as subtypes of Substantial Individuals. Agents are Agentive Substantial Individuals that are classified as Physical Agents (e.g., a person) or Social Agents. Objects are Non-agentive Substantial Individuals that are classified as Physical Objects (e.g., a car) and Social Objects, like languages or norms. A Normative Description defines one or more rules acknowledged by at least one Social Agent, like organizations or communities. A Plan Description is a specialization of a Normative Description that describes Complex Action Universals (such as Processes). Action Universals are Event Universals (Perdurants) as described in UFO-B. Intentional Moments reside in Agents, and can be mental or social. Intentions are Mental Moments, and prompt the Agent to perform Actions, which can be complex or atomic. Social Moments are types of Intentional Moments that are generated by Social Actions.

Mapping the UFO concepts and meta-properties to the FIP ontology it becomes clear that



**Figure 5:** Possible mappings of *FIP* classes to UFO meta-properties and UFO-C Classes.

all FSR instances can be considered as Individuals while FSR types can be considered as Universals. Further, we can map FSRs to Endurants and «Categories», as they represent an aggregation of different «Kinds». As defined in the FIP ontology, FAIR Specifications are "precise descriptions of features, requirements, constraints" and therefore we suggest to map them to Normative Descriptions, which are endorsed by one or more FICs. FICs can be mapped to Collective Social Agents that bear Intentions to implement the FAIR Principles. All specific FAIR Specification types like Metadata Schema can be considered to be «Subkinds». FAIR Practices can be interpreted as Plan Descriptions that describe Complex Actions like the proper usage of a required FSR or a combination of FSRs to achieve a FAIRification goal. FAIR Policies can be distinguished from FAIR Practices by the level of commitment of FIC members, to align with the rules defined in the policy. FIP Declarations are Perdurants that might be classified as Communicative Act that can result in Normative Descriptions, like the FIPs which are recognized by FICs (see Figure 5).

Considering the possible classification options for the *FSR* instance RO-Crate, it can be inferred from the mapping provided that:

- Complex FSR: a specification may intertwine different specification types like *Metadata Schema* and *Provenance Model* in one semantic artefact, and thus may not be individually divisible.
- *FAIR Practice*: is a description of how to carry out a complex action that requires FSRs, which may include specifications.
- Multiple subtypes of *FAIR Specifications* may be applied, but it is crucial to avoid mixing between «Kinds» (services and specifications). This rule is not reflected in the ontology and therefore we recommend to explicitly state this rule in the guidelines for the *FSR* instance descriptions.

The analysis results in a refined definition for *FAIR Practice*: "A method description detailing the use of a specific resource or a combination of resources as applied by a community to achieve FAIR processing of information." Additionally, the metadata template for this type has been enhanced as follows:

- To include statements about employed *FSRs* the object predicate http://purl.org/dc/terms/requires is used.
- To include statements about the supporting *FIC* the object property https://w3id.org/fair/fip/terms/declared-by is used.

We applied the improved template to describe the RELIANCE Research Object Practice, which recommends the use of the *FAIR Specification* RO-Crate and the *Registry* ROHub<sup>27</sup>, and the GFF OSF Practice<sup>28</sup>, which advocates to register all the relevant artefacts created for a 3PFF event in the Open Science Framework. We will also provide clear guidelines on how to provide *FSR* instance descriptions to prevent poor type allocations. We plan to verify whether the suggested changes reduce ambiguities regarding the classification of *FSRs* with multiple types by analysing issue resolution in the Qualification GitHub repository.

### 7. Final Remarks

By conducting ontological analysis using an upper ontology such as UFO as a reference, it becomes possible to offer clarifications in the classification process when submitting a nanopublication description of a specific FSR. This is also instrumental for qualifying FSR descriptions. Further analysis is needed to enhance the FIP ontology and fine-tune the definitions of its classes for other FSR types. Moreover, we want to improve the metadata descriptions of FSR types by analysing relations between different types. Validation of the improved ontology and metadata schemas will be performed using real-world example FSRs, covering both new instances and existing resources to ensure backwards compatibility.

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<sup>&</sup>lt;sup>27</sup>https://w3id.org/np/RAq2HHTwWLjZzP-gIJIRJiQJpjd4KTrMn-WLvnKo1mXdU

<sup>&</sup>lt;sup>28</sup>https://w3id.org/np/RADBsQ41yWver59fedlE0kx3gUDaWMplqM8-BzgOYxUz8

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