**HE²AT CENTER LEGAL AMENDMENT CHANGES**

**Comprehensive Changes Matrix**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Section** | **Change Description** | **RP1\_UCT** | **RP1\_WHC** | **RP2\_WHC** | **RP1\_Old\_WHC** |
| **Definitions** | Added "Azure Cloud Platform" | ✓ | ✓ | ✓ | ✓ |
| Added "Cloud Migration" | ✓ | ✓ | ✓ | ✓ |  |
| Added "Data Access Committee" | ✓ | ✓ | ✓ | ✓ |  |
| Added "Data Access Levels" | ✓ | ✓ | ✓ | ✓ |  |
| Added "External Researcher" | ✓ | ✓ | ✓ | ✓ |  |
| Added "Post-Project Data Use" | ✓ | ✓ | ✓ | ✓ |  |
| Added "Successor Governance Entity" | ✓ | ✓ | ✓ | ✓ |  |
| **Agreement Term** | Modified to allow perpetual Post-Project Data Use | ✓ (Section 2.1) | ✓ (Section 2.1) | ✓ (Section 2.1) | ✓ (Section 2.1) |
| **Data Rights** | Extended license for cloud storage | ✓ | ✓ | ✓ | ✓ |
| Authorization for data transformation | ✓ | ✓ | ✓ | ✓ |  |
| Authorization for External Researcher access | ✓ | ✓ | ✓ | ✓ |  |
| **Cloud Migration** | Authorization to migrate to Azure | ✓ (Section 2.X) | ✓ (Section 2.X) | ✓ (Section 2.19) | ✓ (Section 2.19) |
| Security measures in Azure Cloud | ✓ | ✓ | ✓ | ✓ |  |
| Data security methods by Access Level | ✓ | ✓ | ✓ | ✓ |  |
| **External Researcher Access** | Terms for external access authorization | ✓ (Section 2.Y) | ✓ (Section 2.Y) | ✓ (Section 2.20) | ✓ (Section 2.20) |
| DAC approval requirement | ✓ | ✓ | ✓ | ✓ |  |
| Data Use Agreement requirement | ✓ | ✓ | ✓ | ✓ |  |
| Monitoring and reporting | ✓ | ✓ | ✓ | ✓ |  |
| **Post-Project Data Use** | Data retention periods by level | ✓ (Section 2.Z) | ✓ (Section 2.Z) | ✓ (Section 2.21) | ✓ (Section 2.21) |
| Level 0 (5 years) | ✓ | ✓ | ✓ | ✓ |  |
| Level 1 (10 years) | ✓ | ✓ | ✓ | ✓ |  |
| Levels 2-3 (indefinite) | ✓ | ✓ | ✓ | ✓ |  |
| **Security Provisions** | Enhanced cloud security safeguards | ✓ (Section 6) | ✓ (Section 6) | ✓ (Section 6) | ✓ (Section 6) |
| Extended security breach notification | ✓ (Section 7) | ✓ (Section 7) | ✓ (Section 7) | ✓ (Section 7) |  |
| **Survival Provisions** | External Researcher Access survives termination | ✓ | ✓ | ✓ | ✓ (Section 12.6) |
| Post-Project Data Use survives termination | ✓ | ✓ | ✓ | ✓ (Section 12.6) |  |
| ## Notes on Implementation Differences: |  |  |  |  |  |
| 1. Section numbering differs slightly across documents |  |  |  |  |  |
| - RP1\_UCT and RP1\_WHC documents use 2.Y and 2.Z for key new sections |  |  |  |  |  |
| - RP2\_WHC and RP1\_Old\_WHC use 2.20 and 2.21 for the same sections |  |  |  |  |  |
| 2. All documents maintain proper tracked changes formatting with: |  |  |  |  |  |
| - Red strikethrough text for deletions |  |  |  |  |  |
| - Blue text for additions |  |  |  |  |  |
| 3. All documents have successfully incorporated the substantive provisions from the Amendment.tex file |  |  |  |  |  |

*This table summarizes all amendments to the HE²AT Center Data Transfer Agreements*