

Vademecum

A Handbook for Effective Collaboration within the EOSC co-programmed Partnership

DRAFT

Brussels, 22 September 2022

EOSC Association AISBL

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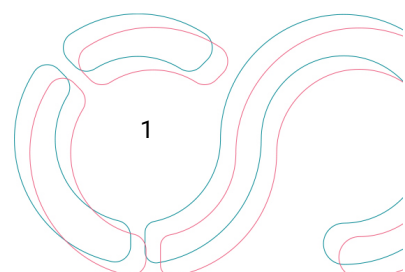
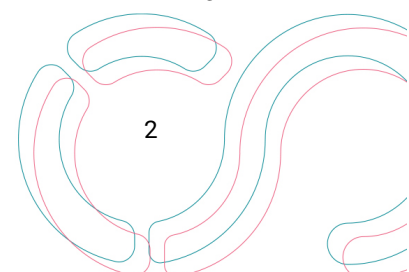


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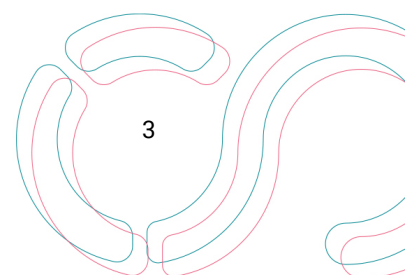
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1. Scope of this Document

1.1 Introduction

This Vademecum provides a framework for the cooperation between the project consortia funded through EU Calls supporting the EOSC European Co-Programmed Partnership (“the Partnership”), among themselves and with the EOSC Association (“EOSC-A”).

EOSC-A is the legal entity established to represent the EOSC stakeholders in the Partnership and to ensure coordination. In this role, EOSC-A serves as the nerve centre for the implementation of the European Open Science Cloud. EOSC-A is also the project coordinator for the INFRAEOSC Horizon Europe EOSC Focus project¹, which supports the whole Partnership, with the EOSC-A Secretariat² being the project lead. EOSC-A’s aim is to steer coordination to leverage the EOSC ecosystem.

This Vademecum has been produced by EOSC-A, after consultations with the European Commission’s DG RTD, DG CNECT, and REA, in the spirit of helping project consortia to implement the European Commission’s terms and conditions set out in the Work Programme 2021-2022, common to all Destination INFRAEOSC projects (and possibly other EC-funded projects that support EOSC) and that are or will be reflected in the Description of Action (DoA), annexed to the Grant Agreement.

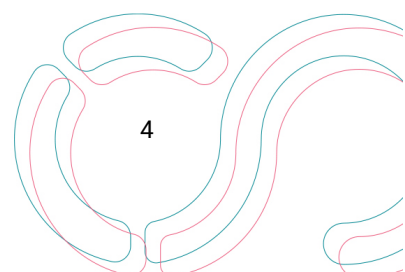
This Vademecum is complementary to the applicable legal framework and does not affect any applicable legal rules. In case of doubt, the applicable legal rules prevail over this Vademecum.

EOSC Forum³, the community engagement platform that can be seen in Figure 1, will play a pivotal role in the implementation and execution of the actions as highlighted in this Vademecum.

¹ EU Grant number 101058432.

² Please see: <https://www.eosc.eu/secretariat>

³ Accessible via: <https://forum.eosc.eu/>



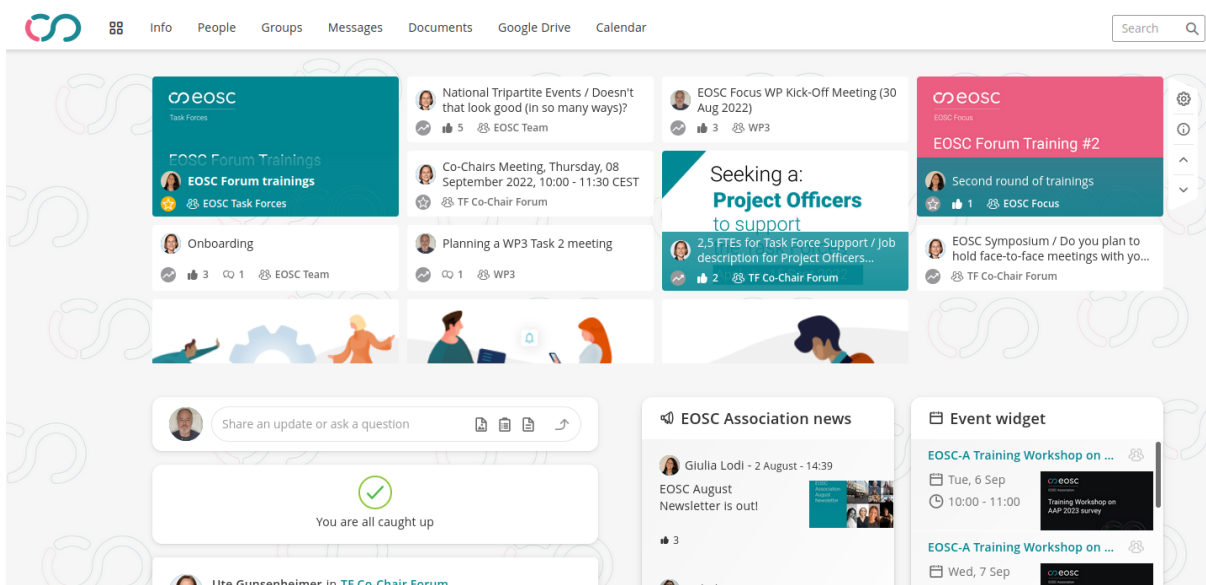


Figure 1. A screenshot of the homepage of EOSC Forum

The aim of the Vademecum is to ensure complementarity of outcomes and to maximise the results⁴ of Destination INFRAEOSC, and by doing this successfully, jointly creating EOSC. Therefore, project consortia are expected to cooperate and align with activities of the EOSC Partnership and to coordinate with relevant initiatives and projects contributing to the development of EOSC.

The Vademecum is expected to evolve over time, based on lessons learnt from its first implementation, feedback from the 2021 INFRAEOSC projects, and the evolution of the Partnership itself.

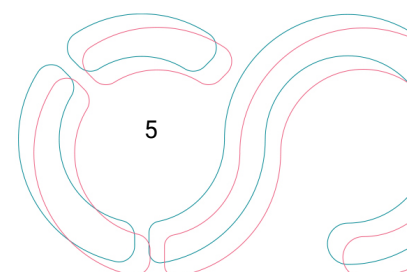
1.2 Purpose and scope

Ultimately, the Vademecum is intended to assist INFRAEOSC project partners, coordinators, and work package leaders by providing operational mechanisms by which to coordinate their activities in the context of the Partnership.

The Vademecum sets expectations for collaboration activities along various areas: Governance, Administration, Communication, Monitoring, Technical Development, and Stakeholder Management. The Vademecum is intended to cover the current phase of the implementation of EOSC within the context of the Partnership, i.e., the period 2021-2030.

Ultimately, if applied broadly and correctly, the Vademecum will be of benefit to the projects, to EOSC-A, to the EC (the involved DGs and REA), and the Partnership, and most importantly to the realisation of EOSC.

⁴ It is recalled that beneficiaries are required to disseminate their results as soon as feasible, in a publicly available format, subject to any restrictions due to the protection of intellectual property, security rules or legitimate interests.

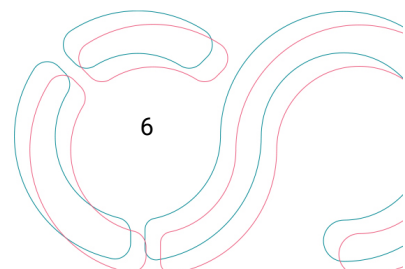


1.3 Formal Basis

The guidance contained within this document builds on specific conditions set out for the INFRAEOSC projects (Work Programme 2021-2022), and introduces recommendations helping to establish a coherent level of coordination among the HE EOSC projects supporting the Partnership. Some of the guidelines will not apply equally to all INFRAEOSC projects (no one-size fits all) and should be discussed and agreed with the EOSC-A Secretariat on a case-by-case basis. Some actions in this Vademecum would represent a minimum level of expected cooperation.

All HE projects, funded under Destination INFRAEOSC, are “expected to participate in concertation activities in the framework of the EOSC Partnership⁵,” to coordinate and align their activities. More specifically, according to the respective Grant Agreements, projects have to fulfil the following conditions:

⁵ Quoted text from the project conditions and clauses.



Guidance and Conditions in the Work Programme 2021-2022:

- Guidance at the level of INFRAEOSC Destination:
 - All software developed under this Destination should be open source, licensed under a CC0 public domain dedication or under an open-source license as recommended by the Free Software Foundation and the Open-Source Initiative
 - All projects that will be financed under this destination are expected to participate in concertation activities in the framework of the EOSC Partnership.
- Specific conditions:
 - Each beneficiary must grant royalty-free access to its results to the EOSC Association for monitoring and developing policies and strategies for the European Open Science Cloud.
 - Each beneficiary must also provide directly to the EOSC Association the information the beneficiary deems necessary for monitoring and developing policies and strategies for the European Open Science Cloud.
 - [on a case by case if EOSC component development is included] Each beneficiary must grant royalty-free access to its intellectual property rights which are part of the results and are needed for further developing the European Open Science Cloud to legal entities identified by the granting authority and established in Member States or countries associated to the Horizon Europe Framework Programme. Such access rights are limited to non-commercial use.

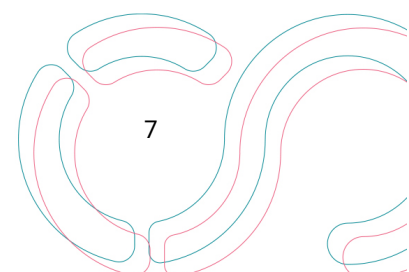
Moreover, in all the relevant topics the following sentence has been included: “to ensure complementarity of outcomes, proposals are expected to cooperate and align with activities of the EOSC Partnership and to coordinate with relevant initiatives and projects contributing to the development of EOSC”.

1.4 The Power of Working Together

To ensure complementarity and harmonisation of EOSC-related outcomes from the projects, this Vademecum will assist the projects in multiple ways, formal and practical alike, to achieve the following goals:

- incorporate results from a project as sustainable results into the EOSC ecosystem,
- avoid duplication of efforts, leaving more resources for other work items in a project,
- learn from each other and inspire each other.

By working together through the modes of operation as outlined in this Vademecum, the organisations working under Destination INFRAEOSC will be able to collaboratively contribute to each other results, in collaboration with EOSC-A, that are larger and more impactful than one single organisation or project can accomplish. This, in turn, has the potential to become visible as a huge success of our collaboration and will attract the attention of other stakeholders and decision makers, both within the EC and within the European Union Member States. Bearing in mind that we are in competition with many other fields of work and Partnerships, showing joint success has a huge potential for the future of EOSC, by preparing the ground for more calls, projects, and funding opportunities for the EOSC-A Members.



Various tasks of EOSC Focus have the resources to guide and assist in the implementation of the actions as listed in the Vademecum.

1.5 Time line

Projects under Destination INFRAEOSC that have already started will be invited to discuss with the EOSC-A the application of the items in this Vademecum and to jointly establish a plan for their implementation throughout their lifetime.

Projects that have been granted but have not started yet will be invited at their very start to discuss the application of the items in this Vademecum. Projects that result from future calls for proposals, or even those already in the proposal writing phase, can benefit from the Vademecum by designing their plans and activities in accordance to the Vademecum's goals and aims.

1.6 Working with the Vademecum

The next chapter of this document provides the reader with an overview of the areas covered, listing the available actions.

The five Annexes of this document detail the actions, per area, and highlight the rationale for and benefits of the actions in each area. The Annexes have been created in a way that allows them each to be used as stand-alone documents, as they contain an introduction, list the potential benefits of adopting the actions in a specific area, and provides an overview of the workflow for implementing the actions of the area.

The following example workflow (Figure 2) describes the approach to reach an expected outcome. It defines several steps of the interaction between EOSC-A and project consortia. The colour code allows to distinguish which party corresponds to which task as indicated in the example (green for EOSC-A, red for project consortia).

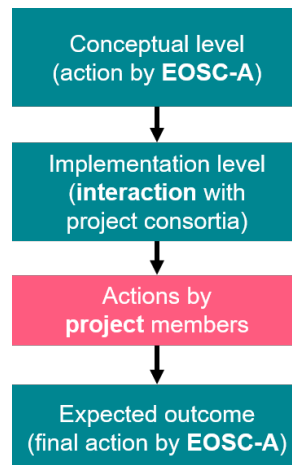
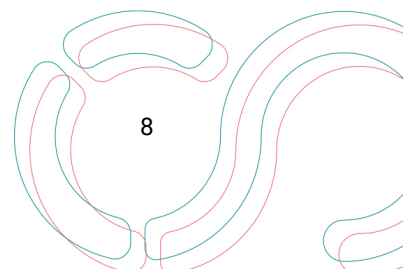


Figure 2. Example Workflow scheme



2. Areas of Cooperation

The Vademecum is structured into five main areas of cooperation: Governance, Administration, Communication & Stakeholder Management, Monitoring & Reporting, Technical Developments.

For each of those areas, this document presents a set of actions of different kinds to ensure a coherent collaboration and coordination in function of the Partnership's objectives and roadmap, considering also the conditions and guidance set in the HE Research Infrastructures Work Programme 2021-2022 and beyond for INFRAEOSC.

For each action, if the project agrees to this action, operational details will be defined and agreed jointly by the project and EOSC-A.

Area A. Governance

The Association's Members and Observers are jointly responsible for delivering the objectives of the European Union's Co-Programmed European Partnership for EOSC.

The following actions within this area are available:

- Action A1: EOSC-A advisory role
- Action A2: Concertation activities
- Action A3: Integration of milestones and deliverables

The benefits of collaborating in this area are highlighted in Annex A. Governance Actions and Workflows.

Area B. Administration

The EOSC-A Secretariat supports the EOSC-A President, the Board and the General Assembly, by advising them and coordinating and implementing their decisions. The Secretary General of EOSC-A is entrusted with the day-to-day management of the Association, leads the Secretariat, and serves as secretary to the Board and the General Assembly. EOSC-A Secretariat also serves as project coordinator for EOSC Focus.

Coordination of work and outcomes basically starts with the actions of this area, as it involves sharing of plans and contact information.

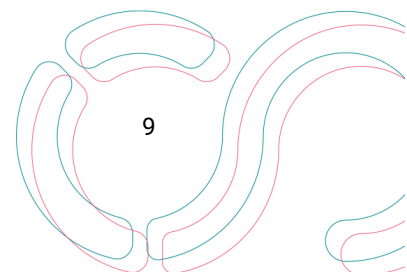
The following actions within this area are available:

- Action B1: Sharing of Action Plans
- Action B2: Sharing of contact information

The benefits of collaborating in this area are highlighted in Annex B. Administration Actions and Workflows.

Area C. Communication and Stakeholder Management

Communication, dissemination, outreach, and stakeholder engagement are actions that must converge in order to reach alignment between projects, especially when performed in the context of the EOSC Partnership, to convey coordinated or complementary messages. Therefore, cooperation and alignment of communication activities will be coordinated within



the EOSC Partnership and between the INFRAEOSC Projects. Communication & Dissemination work packages already take this into account, and further alignment and coordination will be jointly sought by including dedicated actions that can be promoted by the EOSC-A.

Within EOSC-A, the day-to-day management of communications is the responsibility of the Secretariat, which maintains the EOSC-A website and other communication channels. INFRAEOSC project activities and their outputs and results can become an integral part of EOSC-A communications.

The following actions within this area are available:

- Action C1: Co-Branding and messaging
- Action C2: EOSC Partnership on project websites
- Action C3: EOSC Partnership communication & dissemination (C&D) Working Group
- Action C4: Coordinated schedule of events and meetings
- Action C5: Input to EOSC-A communication channels
- Action C6: Macro-roadmap of Partnership results
- Action C7: Annual EOSC events
- Action C8: Inclusion of EOSC-A in INFRAEOSC stakeholder for a

The benefits of collaborating in this area are highlighted in Annex C. Communication & Stakeholder Management Actions and Workflows.

Area D. Monitoring

Monitoring of project results is a core element, as it informs on strategic development and assesses the impact and overall value of the Partnership over its lifetime. All parties to the EOSC Partnership serve as the sources of data for the Monitoring Framework.

The Monitoring and Evaluation Framework of the Key Performance Indicators (KPIs) of the EOSC Partnership was provisionally defined in the Strategic Research and Innovation Agenda (SRIA)⁶ and committed to in the Partnership MoU. EOSC-A will aggregate the data to be used in the Monitoring Framework, and is also responsible for reporting based on these data. The Monitoring Framework is a living document that will continually be adjusted to suit the needs of the Partnership and the diversity in the ecosystem. WP4 of EOSC Focus is tasked with supporting the monitoring and impact assessment of the Partnership as a whole.

The following actions within this area are available:

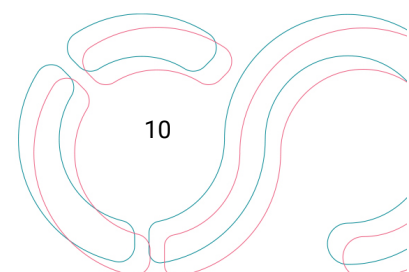
- Action D1: Provision of monitoring data
- Action D2: Development of KPIs
- Action D3: Promotion of monitoring initiatives

The benefits of collaborating in this area are highlighted in Annex D. Monitoring Actions and Workflows.

Area E. Technical Developments

To maintain the alignment between the Partnership's policy objectives and the technical development of EOSC, EOSC-A will take the lead in the design of the technical architecture and

⁶ <https://www.eosc.eu/sria>



interoperability of EOSC as defined by the SRIA, and assist in its implementation where needed. With actions in this area, the INFRAEOSC projects will be able to have direct involvement in the implementation phase, including providing input on strategic technical areas of future work.

The following actions within this area are available:

- Action E1: Input on implementation of EOSC
- Action E2: Input to planning and communication
- Action E3: EOSC Technical Coordinators' Cockpit
- Action E4: Joint technical and services meetings
- Action E5: Interact with Member States and Task Forces

The benefits of collaborating in this area are highlighted in Annex E. Technical Developments Actions and Workflows.

Annex A. Governance Actions and Workflows

Introduction

EOSC-A is the legal entity established to represent the EOSC stakeholders in the Partnership and to ensure coordination. In this role, EOSC-A runs the EOSC-A Secretariat which serves the EOSC-A Board of Directors and the General Assembly. EOSC-A is involved in the EOSC Tripartite Governance, together with the European Commission, the Member States, and the countries associated with the HE programme which are members of the EOSC Steering Board.

The Association's Members and Observers are jointly responsible for delivering the objectives of the European Union's Co-Programmed European Partnership for EOSC.

The following actions within this area are available:

- Action A1: EOSC-A advisory role
- Action A2: Concertation activities
- Action A3: Integration of milestones and deliverables

Benefits

An active advisory role for EOSC-A will ensure an effective information flow between all INFRAEOSC projects and the EOSC governance at the Partnership level. This increases collaboration and enhances the synergy between projects; therefore, projects get to build on each other's results and duplication of efforts will thus be avoided. Structuring the alignment of INFRAEOSC projects and the EOSC Partnership contributes to set and manage mutual expectations, and helps the projects to meet the reporting and monitoring obligations they have towards the Partnership.

Workflow

For the Area A on Governance, this is specified as follows:

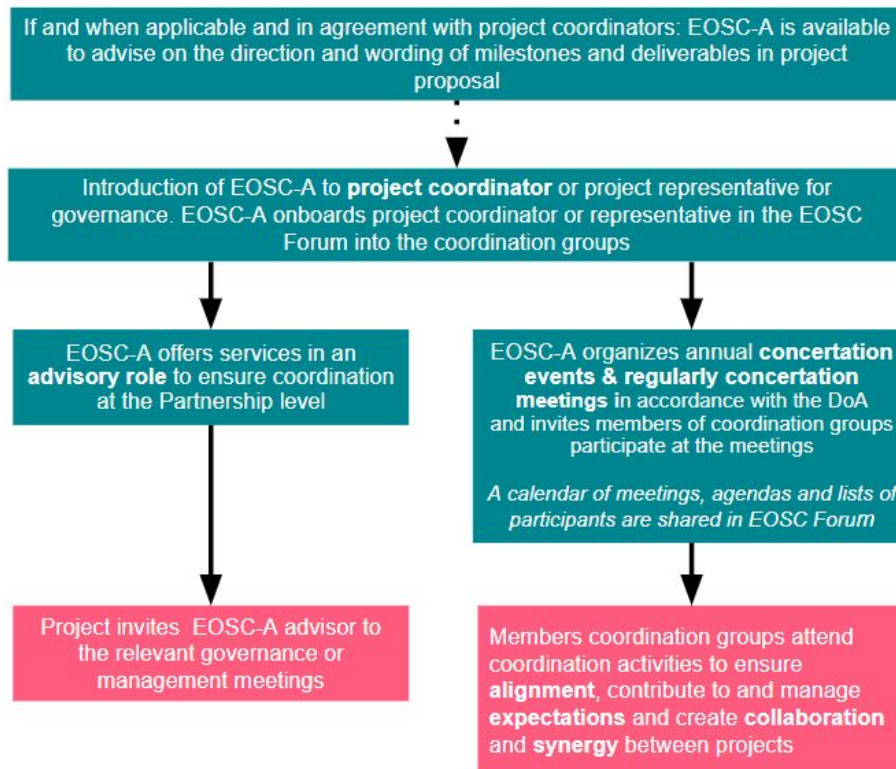


Figure 3. Workflow for Area A

Action A1: EOSC-A advisory role

Scope

With this action, EOSC-A aims to serve in an advisory role to the Destination INFRAEOSC project to ensure coordination at the Partnership level. It is recommended to invite EOSC-A representatives to participate in relevant governance or management meetings of the INFRAEOSC project.

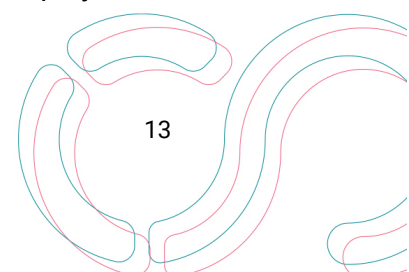
Rationale

An active advisory role for EOSC-A will ensure good information flow between EOSC-A and the project and between the project and other INFRAEOSC projects. EOSC-A will actively offer and contribute a viewpoint from EOSC governance level and from Partnership level. EOSC-A, in its advisory role, can also advise and guide projects on how best to coordinate alignment with the EC Work Programmes, on the priorities of the EOSC SRIA and on other strategic initiatives in the implementation of EOSC.

Action A2: Concertation activities

Scope

Regular concertation meetings among EOSC-related projects will be held in accordance with the EOSC Focus Description of Action (DoA), including the concertation events organised by EOSC-A. Such event will be organised yearly for the duration of the EOSC Focus projects, after



which their recurrence will be decided in the context of the EOSC Partnership. The EC and its executive agency REA might be co-organisers of the concertation meetings.

Rationale

Participation in concertation activities is among the expectations set for the INFRAEOSC projects in the Work Programme. The 2022 annual concertation meeting is an initiative of the EC and represents the expected minimum level of cooperation in Action A2. Similar events are expected to take place in 2023 and beyond, when new Destination INFRAEOSC projects are awarded.

Action A3: Integration of milestones and deliverables

Scope

If and when applicable⁷, clear and specific milestones and deliverables, contributing to the objectives of the EOSC Partnership, will be suggested for inclusion in proposals or could be integrated in the DoA of the INFRAEOSC projects during the grant preparation phase, in agreement with the contracting authority and the consortium. EOSC-A is available to advise on the direction and wording of said milestones and deliverables.

For new projects, the proposers are strongly recommended to include feedback to policy, and hence contribution to the Partnership, Deliverables and Milestones for each Reporting Period each year. This will assist the Partnership in evolving, and will help the EC and EOSC-A prepare for next steps in the evolution of EOSC.

Rationale

Formalising the alignment of INFRAEOSC projects and the EOSC Partnership contributes to set and manage mutual expectations and helps the projects to meet the reporting and monitoring obligations they have towards the Partnership. Moreover, this action helps the project to better and easier succeed in their ambition to make sustainable contributions to the EOSC ecosystem.

⁷ Inclusion of such outputs in selected grants following the 2021 and 2022 calls for proposals could be implemented through an amendment and only in agreement with the project coordinator(s) and REA.

Annex B. Administration Actions and Workflows

Introduction

The EOSC-A Secretariat supports the EOSC-A President, the Board and the General Assembly, by advising them and coordinating and implementing their decisions. The Secretary General of EOSC-A is entrusted with the day-to-day management of the Association, leads the Secretariat, and serves as secretary to the Board and the General Assembly. EOSC-A Secretariat also serves as project coordinator for EOSC Focus.

Coordination of work and outcomes basically starts with the actions of this area, as it involves sharing of plans and contact information.

The following actions within this area are available:

- Action B1: Sharing of Action Plans
- Action B2: Sharing of contact information

Benefits

These actions facilitate communication and coordination. This will support the exchange of information between projects, and enable a dialogue to communicate with stakeholders.

Workflow

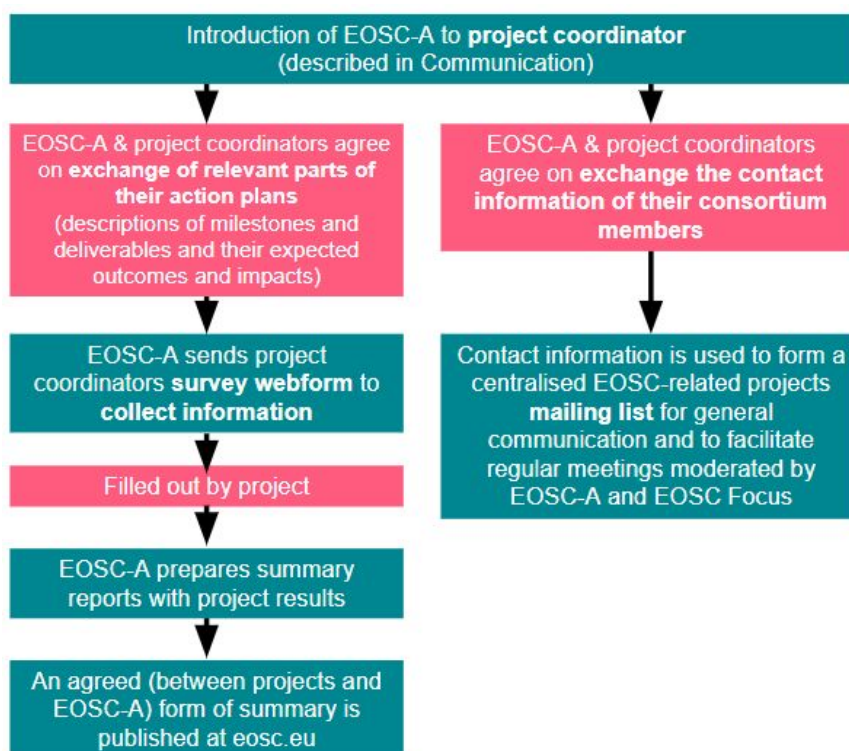


Figure 4. Workflow for Area B

Action B1: Sharing of Action Plans

Scope

Projects will share the relevant parts of their action plans, including descriptions of milestones and deliverables and their expected outcomes and impacts.

Rationale

The Destination INFRAEOSC Work Programme requires that royalty-free access to results is granted to EOSC-A, together sufficient information agreed with the beneficiaries necessary for monitoring and developing policies and strategies for EOSC. Beyond these minimum requirements, active sharing of detailed project information across INFRAEOSC projects will facilitate all aspects of Partnership coordination. Agreeing on supporting this degree of coordination will enable the Partnership to maximise efficiencies, reinforce outcomes, and coordinate activities and schedules between projects, for the benefit of all projects and their cooperation with EOSC-A.

Action B2: Sharing of contact information

Scope

With this action, projects will share the contact information of their consortium members with EOSC-A, and EOSC-A will ensure that there are clearly defined liaison persons for each project.

Rationale

Ensuring contact information among the Destination INFRAEOSC and EOSC-A is readily available, to facilitate management of a centralised EOSC-related projects mailing list for general communication and to facilitate regular meetings moderated by EOSC-A and EOSC Focus.

Annex C. Communication & Stakeholder Management Actions and Workflows

Introduction

Communication, dissemination, outreach, and stakeholder engagement are actions that must converge to reach alignment between projects, especially when performed in the context of the EOSC Partnership. Therefore, cooperation and alignment of communication activities will be coordinated within the EOSC Partnership and between the INFRAEOSC Projects. Communication & Dissemination work packages already take this into account and further alignment and coordination will be jointly sought to include dedicated actions that can be promoted by the EOSC-A.

Within EOSC-A, the day-to-day management of communications is the responsibility of the Secretariat, which maintains the EOSC-A website and other communication channels. INFRAEOSC project activities and their outputs and results can become an integral part of EOSC-A communications.

The following actions within this area are available:

- Action C1: Co-Branding and messaging
- Action C2: EOSC Partnership on project websites
- Action C3: EOSC Partnership communication & dissemination (C&D) Working Group
- Action C4: Coordinated schedule of events and meetings
- Action C5: Input to EOSC-A communication channels
- Action C6: Macro-roadmap of Partnership results
- Action C7: Annual EOSC events
- Action C8: Inclusion of EOSC-A in INFRAEOSC stakeholder fora

Benefits

Coordinated communication and dissemination activities strengthen collaboration and alignment among INFRAEOSC projects, avoid overlap and reduce stakeholder fatigue; they also maximise synergies, and facilitate visibility of project results across disciplines.

Workflow

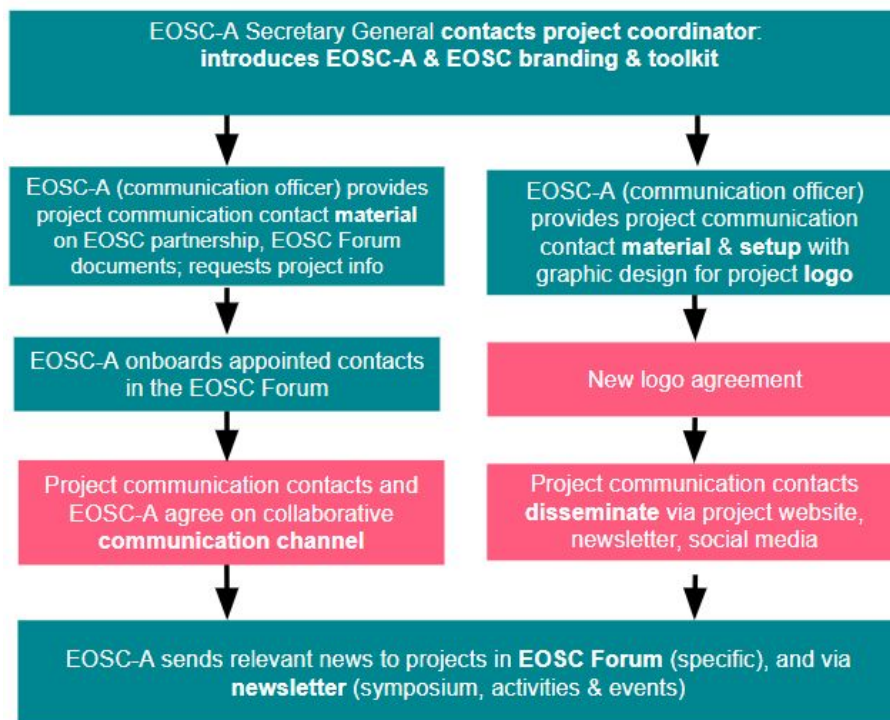
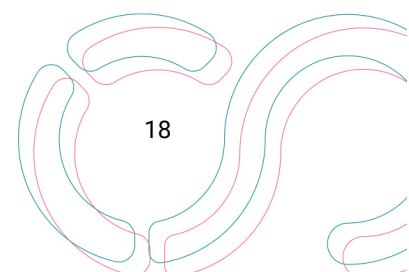


Figure 5. Workflow for Area C part 1



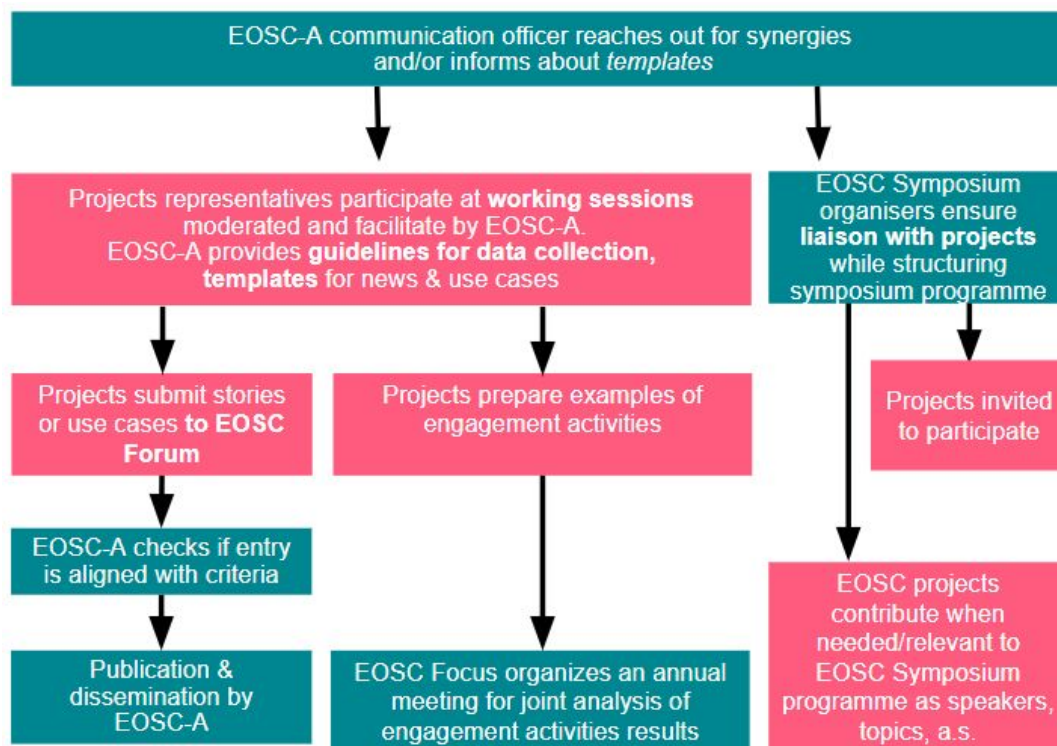


Figure 6. Workflow for Area C part 2

Action C1: Co-Branding and messaging

Scope

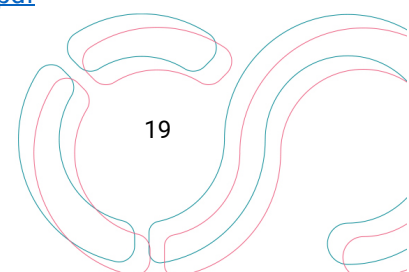
With the implementation of the EOSC Co-Branding Guidelines⁸, INFRAEOSC projects will be able to demonstrate joint responsibilities concerning the exchange of information and materials, in order to facilitate the alignment with the Partnership’s messaging and objectives. This includes making all reasonable efforts to promote a robust, common EOSC brand to identify all Partnership activities contributing to the implementation of EOSC. With this action, projects will be assisted by EOSC-A in their communication efforts, which will enable them to arrive at milestones quicker and leverage the new EOSC Brand being established coherently.

Rationale

The EOSC Co-Branding Guidelines have been developed specifically for the purpose of nurturing the family brand for EOSC. It is essential to the success of the Partnership that INFRAEOSC activities are easily recognized and properly acknowledged. For the same reasons that the requirement for acknowledgement in Horizon Europe must always be respected, EOSC

⁸ Available at:

https://eosc.eu/sites/default/files/20220822_Co-Branding%20Guidelines%20for%20HE%20INFRAEOSC%20Projects_4_EOSC-A_final.pdf



co-branding is expected to become a reflex-action on the part of the INFRAEOSC projects in order to consolidate the real and total value of the EOSC Partnership over its lifetime.

Action C2: EOSC Partnership on project websites

Scope

With this action, basic information concerning the EOSC Partnership will become available and visible on the INFRAEOSC project's website, preferably with a dedicated section or page. Dissemination of Partnership news, events, and other information will, under this action, be regularly integrated with project communication channels.

Rationale

Highlighting the family brand for EOSC on the project's website shows the larger context in which the INFRAEOSC project operates. This aids to sustain the value of the Partnership, project participants, and followers that thus gain access to Partnership information. Moreover, the role of the project within the EOSC Partnership will be brought to the foreground as a key element of the project's identity.

Action C3: EOSC Partnership C&D Working Group

Scope

A working group on Communications & Dissemination (C&D) will be established at EOSC-A level. With this action, the INFRAEOSC project will become part of this working group.

Rationale

It is important to plan, capture, and capitalise on synergies between INFRAEOSC projects, both those happening concurrently and those originating in subsequent INFRAEOSC calls. As an impactful vehicle for nimble interaction and regular coordination meetings between EOSC-A, the EC and the INFRAEOSC project C&D work packages will be necessary to achieve the C&D goals of the Partnership.

Action C4: Coordinated schedule of events and meetings

Scope

A master schedule of events and meetings at the project and Partnership levels will be established and maintained by EOSC-A in coordination with the INFRAEOSC projects. This will first of all contribute to avoiding calendar conflicts or redundant activities that could lower participation in the events, which could work against or dilute the impact of the Partnership's objectives. Moreover, doing concerted events and meeting planning for as many INFRAEOSC projects as possible will maximise participation and interaction.

Rationale

Optimising meeting and event schedules via a coordinated calendar will assist all Partnership and project participants, EC representatives, and all Members and Observers of the EOSC-A and its Board with time management and resource allocation.

Action C5: Input to EOSC-A communication channels

Scope

With this action, INFRAEOSC project C&D work packages will share timely project information with EOSC-A for inclusion on its website and in the periodic newsletter. This information flow will also allow the project to communicate more easily the bigger picture of EOSC, and how the project contributes to it and to its sustainable success.

Rationale

A bi-directional approach to C&D is necessary to establish a family brand for EOSC and to maintain alignment. It is important to both centrally aggregate the messaging and communications of the Partnership and to use each party of the Partnership as a C&D multiplier for the INFRAEOSC projects.

Action C6: Macro-roadmap of Partnership results

Scope

The public results of various EOSC initiatives, including the INFRAEOSC projects, will be documented on a macro-roadmap maintained on the EOSC-A website. With this action, the INFRAEOSC project will become part of the macro-roadmap by including project results as items. Wherever necessary, cooperation frameworks between projects will be established to facilitate the release of this information.

Rationale

The macro-roadmap will facilitate efficient navigation of the EOSC landscape by its contributors and stakeholders and help to assess the value of the Partnership over its lifetime. The creation of the macro-roadmap is a core element of the EOSC Partnership and will be organised, whenever possible according to the timeline of established deliverables and milestones, in order to track the progress of Partnership activities both project-by-project and according to other categories.

Action C7: Annual EOSC events

Scope

An annual collaboration event, dedicated to the INFRAEOSC projects, will be organised by EOSC-A to bring the projects together. The EC and its executive agency REA might co-organise future events. Also, the annual EOSC Symposium will be organised by EOSC-A from 2024 onwards. By taking part in this events, INFRAEOSC projects will have the opportunity to leverage their results to peers in other projects running at the same time, and to (prepare to) showcase their results to EOSC-A Members.

Rationale

The annual collaboration event is fundamental to the coordination and collaboration mandate of the Partnership. The EOSC Symposium is an opportunity to isolate and amplify the coordinated activities across the INFRAEOSC projects, the EC and the Association.

Action C8: Inclusion of EOSC-A in INFRAEOSC stakeholder fora

Scope

Within this action, EOSC-A representatives are invited to participate in INFRAEOSC project stakeholder fora, facilitating a concerted collection of input and the provision of feedback.

Rationale

Transparency in INFRAEOSC projects' interactions with their stakeholders will increase the efficiency of communications efforts across the partnership and will ensure the visibility of the Partnership across the full field of INFRAEOSC projects.

Annex D. Monitoring Actions and Workflows

Introduction

Monitoring is a core element of the EOSC Partnership, as it informs on strategic development and assesses the impact and overall value of the Partnership over its lifetime. All parties to the EOSC Partnership serve as the sources of data for the Monitoring Framework.

The Monitoring and Evaluation Framework of the Key Performance Indicators (KPIs) of the EOSC Partnership was provisionally defined in the SRIA and committed to in the Partnership Memorandum of Understanding (MoU)⁹. EOSC-A will aggregate the data to be used in the Monitoring Framework, and is responsible for reporting based on these data. The Monitoring Framework is a living document that will continually be adjusted to suit the needs of the Partnership and the diversity that exists in the ecosystem. WP4 of EOSC Focus is tasked with supporting the monitoring and impact assessment of the Partnership as a whole.

The following actions within this area are available:

- Action D1: Provision of monitoring data
- Action D2: Development of KPIs
- Action D3: Promotion of monitoring initiatives

Benefits

Targeted monitoring of projects, concerning the EOSC Partnership monitoring framework and for the development of key exploitable results to be integrated in EOSC, will limit the diversion and strengthen the common vision for EOSC. Moreover, an efficient monitoring will increase transparency and trust. This will foster the exchange between EOSC-A and projects, as well as a dialogue among projects themselves. This includes the communication of results, gaps, impact, and needs from the EOSC community to policy makers. On top of that, monitoring will ensure that projects follow internationally recognized standards, while showcasing achievements at a global level.

Workflow

⁹ https://eosc.eu/sites/default/files/20210215_EOSC_MoU_FinalDraft.pdf

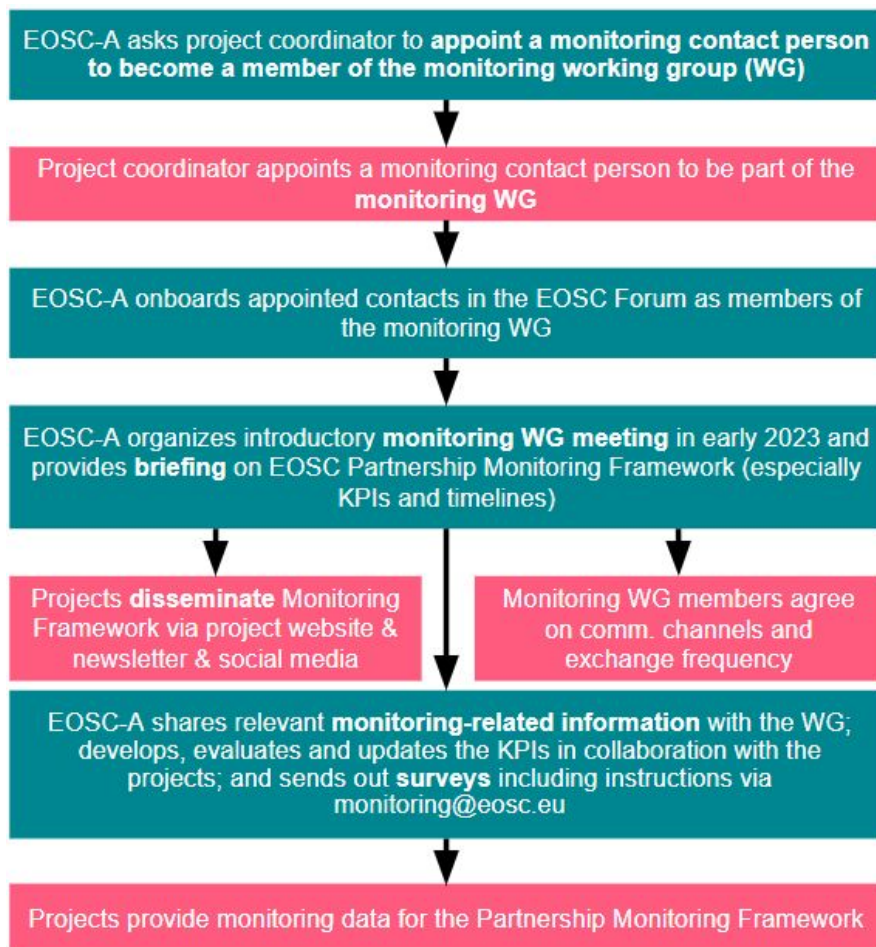


Figure 7. Workflow for Area D

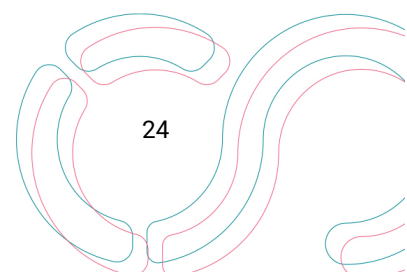
Action D1: Provision of monitoring data

Scope

Projects will be strongly encouraged to provide monitoring data to EOSC-A in accordance with the Partnership's Monitoring Framework. The data needed by the Association¹⁰, and the channels by which that data can be delivered, will be communicated by EOSC-A to the project. With this action, projects will contribute to the overall monitoring result of the INFRAEOSC projects.

Rationale

¹⁰ EOSC-A will strive to choose the data carefully, to avoid substantially increasing the reporting burden on the project.



Monitoring of EOSC Partnership KPIs¹¹ across the projects is a core element of the Partnership which is being implemented to inform its strategic development and to accurately assess the impact and overall value of the Partnership over its lifetime. It is essential to collect this data in order to publicly validate the outputs and impacts of the EOSC Partnership which constitutes a crucial contribution to the visibility of EOSC towards decision makers in the EC and in the Member States. This, in turn, is important for follow-up calls and actions to further grow EOSC. By contributing data to the Monitoring Framework, projects have a huge opportunity to ensure the availability of future EOSC related calls.

Action D2: Development of KPIs

Scope

With this action, the Destination INFRAEOSC project participates in defining KPIs and in identifying the data sources and data providers for the indicators. EOSC-A will initiate a working group of INFRAEOSC project representatives that will be tasked with the continuous evaluation and the updating of KPIs. EOSC-A will also provide support through hands-on training materials and a monitoring and reporting helpdesk.

Rationale

As the Monitoring Framework is a living document, designed to adapt to the evolution of EOSC and the EOSC Partnership, the KPIs must be regularly re-evaluated and updated with the participation of all parties to the Partnership, while maintaining targeted consistency to make the monitoring meaningful over time.

Action D3: Promotion of monitoring initiatives

Scope

With this action, the project will promote EOSC-A monitoring initiatives, such as surveys and information activities, through project's communication channels, to encourage participation and engagement across the full EOSC ecosystem. Also, dissemination of results will be done in a broad and inclusive way. In return, EOSC-A will support the project to disseminate information on its activities.

The project and EOSC at large will benefit from this action, in terms of reach and visibility. The project will also benefit from existing monitoring data collected by the EOSC-A.

Rationale

EOSC Partnership monitoring and reporting is relevant beyond the EOSC-A member base. In order to capture the complete picture of the evolving EOSC landscape, it is necessary to expand the reach of surveys and other forms of data gathering and community input beyond the Association and the INFRAEOSC projects. This provides added value to the projects by increasing their visibility and motivating the uptake of their outputs.

¹¹ For the avoidance of doubt, these are not the KPIs of the DoA, but the KPIs of the EOSC Monitoring Framework.

Annex E. Technical Developments Actions and Workflows

Introduction

To maintain the alignment between the Partnership's policy objectives and the technical development of EOSC, EOSC-A will take the lead in the design of the technical architecture and interoperability of EOSC as defined by the SRIA, and assist in its implementation where needed. With actions in this area, the INFRAEOSC project will be able to have direct involvement in the implementation, including providing input on strategic technical areas of future work.

The following actions within this area are available:

- Action E1: Input on implementation of EOSC
- Action E2: Input to planning and communication
- Action E3: EOSC Technical Coordinators' Cockpit
- Action E4: Joint technical and services meetings
- Action E5: Interact with Member States and Task Forces

Benefits

Cross-project alignment on technical developments (design, architecture, implementation, roadmaps and deliverables) within INFRAEOSC projects is essential to the efficient and coherent development of EOSC, to maximise the impact of the project outputs, and to ensure their integration with an operational EOSC platform and the long-term sustainability of EOSC.

Workflow

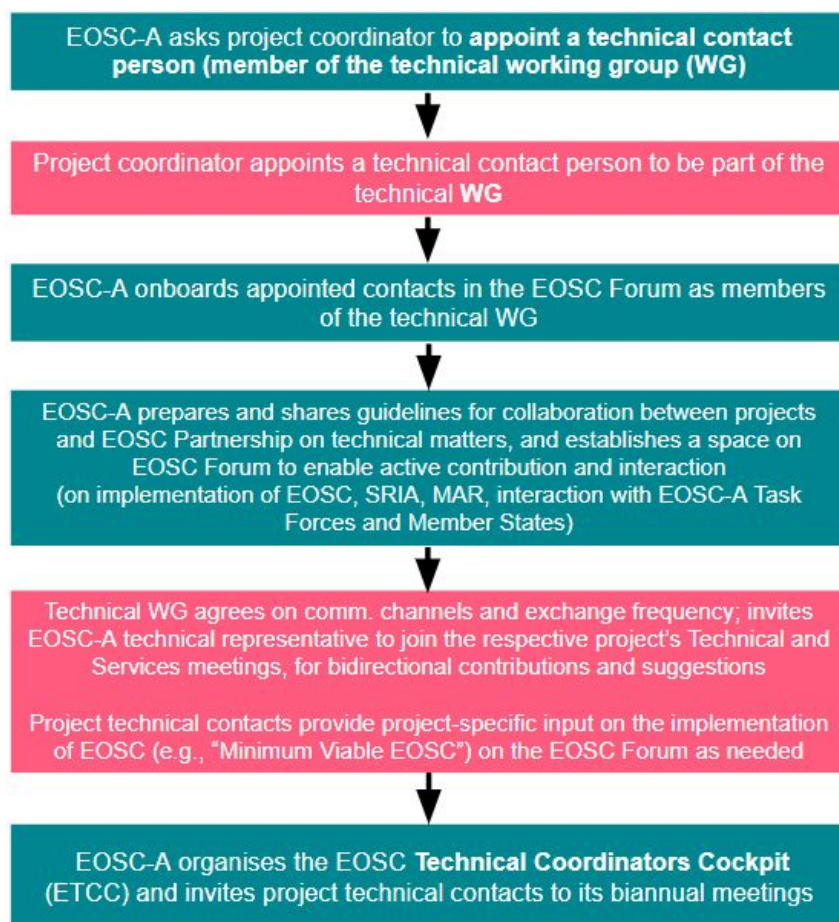


Figure 8. Workflow for Area E

Action E1: Input on implementation of EOSC

Scope

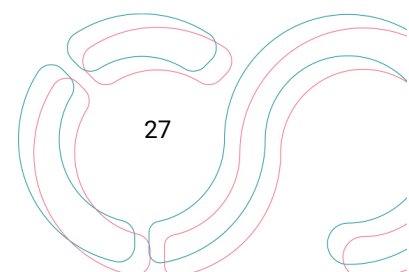
For the mutual benefit and use of the INFRAEOSC projects, the EOSC-A will provide a Forum for project-specific input to:

- The implementation of the "Minimum Viable EOSC".
- The implementation of the EOSC-related service offering and development.
- The integration and sustainability of the EOSC-related service offering.
- Address research careers and curricula.

With this action, the INFRAEOSC project will participate in the sharing of knowledge and information on the technical implementation of EOSC.

Rationale

Close cooperation through well-established and open communication channels is necessary for cross-project alignment on the technical developments within INFRAEOSC projects. This alignment is essential for the efficient and coherent development of EOSC, maximising the impact of the project outputs and contributing to the long-term sustainability of EOSC.



Action E2: Input to planning and communication

Scope

For the mutual benefit and use of the INFRAEOSC projects, the EOSC-A will provide a Forum to enable active contributions and interaction from the projects to the SRIA, MAR¹², and communications concerning the EOSC technical framework and implementation activities.

Rationale

The topics in the Work Programme that consider the consultation with EOSC-A, the EOSC Stakeholders, the SRIA, and its Multiannual Roadmap ensure that the outcomes from an INFRAEOSC project align with the policy objectives of the EOSC Partnership, so that they can be integrated into future developments. However, some technical developments require alignment and coordination. When the technical work packages of an INFRAEOSC project are fully integrated with the planning and policy side of the EOSC implementation, the integration becomes as easy as possible.

Action E3: EOSC Technical Coordinators' Cockpit

Scope

To stimulate and coordinate the technical developments of a sustainable EOSC ecosystem, the technical coordinator(s) of the INFRAEOSC project cooperate with, participate in and contribute to the biannual EOSC Technical Coordinators' Cockpit (ETCC) meeting.

Rationale

The ETCC and its biannual meeting will serve two purposes: to ensure cross-project alignment on technical and services design, architecture, implementation roadmaps, and implementation; and to inform EOSC stakeholders about the big picture of the technical implementation of EOSC.

Action E4: Joint technical and services meetings

Scope

With this action, an INFRAEOSC project is strongly encouraged to invite an EOSC-A technical representative to join the respective project's Technical and Services meetings, for bi-directional contributions and suggestions. This action will help the project and EOSC-A to be on top of the state-of-the-art technical developments in the EOSC Ecosystem.

Rationale

Inclusion of EOSC-A representatives in Technical and Services meetings helps to promote alignment and transparency within the Partnership. It also enables EOSC-A to integrate project technical results with that of the EOSC Task Forces, and to align both its internal and external communications concerning the technical development of EOSC.

¹² <https://eosc.eu/multi-annual-roadmap-mar-consultation>

Action E5: Interact with Member States and EOSC-A Task Forces

Scope

EOSC-A will help to establish fora to enable INFRAEOSC projects to interact with the Association's membership, its Task Forces and the EU Member States with the objective to ensure alignment with the SRIA's long-term technical and services roadmap and integration with the production-grade technical and services platform. With this action, the INFRAEOSC project will be given the opportunity to have an active participation in these fora.

Rationale

Alignment of the project's technical deliverables with the long-term technical and services sustainability roadmap is necessary to ensure that the project's technical and services outputs can become integrated with an operational EOSC platform. This is fundamental to the success of EOSC and to the ultimate value of the Partnership. To ensure this alignment at each step of the development of EOSC, it is imperative that the activities of the projects take place within an open dialogue with the EOSC-A community of Members, Task Forces, and the Destination INFRAEOSC projects.