European Union HORIZON 2020 PROGRAMME

EOSC-hub / OpenAIRE-Advance Collaboration Agreement

Version 0.1, 14 December 2017

Collaboration Agreement of the complementary grants:

EOSC-hub, Proposal 777536

EINFRA-12-2017(a) Secure and agile data and distributed computing e-infrastructures

OpenAIRE-Advance, Proposal 777541

EINFRA-12-2017(b) Access and preservation platforms for scientific information

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The legal entities participating as beneficiaries in Complementary Grant Agreement N. 777536 (Acronym: EOSC-hub, Full title: ….) hereinafter the "EOSC-hub"; and Grant Agreement N. 777541 (Acronym: OpenAIRE-Advance, Full title: ….) hereinafter the “OpenAIRE-Advance”, and having signed a Declaration of Accession to this Agreement attached hereto in Annex 1, hereinafter also referred to as "Complementary Beneficiaries" or “Parties”,

WHEREAS …

WHEREAS …

WHEREAS …

**AGREE AS FOLLOWS**

# ARTICLE 1. Definitions

The following definitions shall apply to this Collaboration Agreement :

Accession Date: means the date of the signature of the Declaration of Accession attached

hereto in Annex 1 by each Party joining the Collaboration Agreement.

Access Rights: shall have the meaning assigned to it under Article 25.1 of the Horizon 2020 Model Grant Agreement (hereinafter "MGA").

Affiliated Entity shall have the meaning assigned to it under Article 25.4 of the MGA.

Complementary Background: means Background, as defined in Article 24.1 of the MGA,

excluding, for each Party, Background of the ... Project in which that Party participates.

Complementary Results means the Results, as defined in Article 26.1 of the MGA, but excluding, for each Party, Results of the ... Project in which that Party participates.

Complementary Grant Agreement(s) means the Grant Agreements within the meaning of

Article 2.1 of the MGA entered into by the entities participating in ..., and determined to be complementary in accordance with their respective provisions.

Management structure: refers to the defined management structure of each project as described in the respective DoA which addresses 1) the dynamics of the respective consortium, and 2) the service typology which targets the corresponding research phase (cloud, data management services…)

Executive Office: refers to the Activity Management Board as defined in the DoA of the OpenAIRE-Advance project

Activity Management Board: refers to the Activity Management Board as defined in the DoA the EOSC-hub project

Interlinked Management structure: refers to the constellation in which liaison and alignment of activities managed by the Executive Office and Activity Management Board takes places through task forces and monitored by the chairs of the EOSC-hub and OpenAIRE-Advance projects

General Assembly: refers to the General Assemblies in of the individual EOSC-hub and OpenAIRE-Advance projects as defined in the DoA of respective projects.

Joint General Assembly: refers to a joint General Assembly, merging the General Assemblies of the EOSC-hub and OpenAIRE-Advance projects.

Advisory Board: refers to the advisory board in of the two EOSC-hub and OpenAIRE-Advance projects as defined in the DoA of the respective projects. .

Cross-project Strategic Board: refers to the inter-project governance body overseeing the work carried out within the scope of this collaboration agreement.

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# ARTICLE 2. Purpose and Relationship with Consortium Agreements

Τhis Collaboration Agreement is concluded between the Parties in view of their obligations

under their respective grant agreements, in accordance with Article XXX of the MGA.

The purpose of this Collaboration Agreement, which shall be implemented in accordance

with the provisions of the respective Complementary Grant Agreements signed by each

complementary beneficiary, is (i) to define rights and obligations of the Parties relating to

their coordination and collaboration, and (ii) to implement the provisions of the respective Complementary Grant Agreements concerning amongst other things Access Rights relating to Complementary Results and Complementary Background.

Nothing in this Collaboration Agreement shall be construed to prevent all beneficiaries of

one grant from agreeing (in the respective Consortium Agreement) to additional,

supplementing or deviating Access Rights (including conditions thereof) or confidentiality

obligations, provided that such obligations shall apply only to the beneficiaries of the

applicable grant and their participation in the respective Project. It is further

understood that in the event of a conflict, the terms and conditions of the Consortium

Agreement shall prevail over the terms and conditions of this Collaboration Agreement,

but only with respect to and among the beneficiaries of the applicable Projects.

[COMPLETE]

# ARTICLE 3. Management and Collaboration Aspects

A **single executive body** as proposed by the external panel is not easy to implement as this may cause serious disruption in the planned activities, and it is not legally feasible. Instead, the two consortia plan an interlinked and aligned management structure. The following shows an initial mapping of the existing management bodies:

**Interlinked management structure**

Activities of the Executive Office and the Activity Management Board will be synchronized through a close collaboration of two task forces: B (Communication, engagement, training) and C (Services).

Key operations will be aligned and transferred to respective project bodies and activities. Chairs of OpenAIRE-Advance and EOSC-hub projects will liaise and monitor the implementation of the approved collaboration activities and report/escalate appropriately to the OpenAire-Advance PSC/ EOSC-hub PMB.

Assembly

The chairs of OpenAIRE-Advance and EOSC-hub project will meet at least once per quarter

# ARTICLE 4. Governance

**General Assemblies**

Due to legal implication and contractual constraints of the individual projects as defined by the respective DoAs, integration of the existing General Assemblies of the OpenAIRE-Advance and EOSC-hub are not deemed feasible. A J*oint General Assembly* will therefore not be pursued and the existing *General Assembly* of as defined in de DoA for the individual projects will stay in place independently throughout the entire duration of the projects and this collaboration agreement.

**Advisory Board**

Composition

By M6, EOSC-Hub and OpenAire-Advance will review the requirements of their advisory board, and whether there is sufficient overlap to merit a single advisory board across both projects; if there is not sufficient overlap, then the projects will consider common members between the advisory board.

This review of overlapping requirements may take into account the needs of EOSCPilot and eInfraCentral.

**Cross-Project Strategic Board**
Composition

The *Cross-Project Strategic Board* will consist of a total of 10 members, 5 to be selected by the OpenAIRE-Advance project and 5 to be selected from the EOSC-hub project.

Selection

Members of the Cross-Project Strategic Board will be appointed for the term corresponding with the duration of this Collaboration Agreement, the duration of the OpenAIRE-Advance project and the duration of the EOSC-hub project - whichever is shortest.

Capacity

For the duration of this collaboration agreement, this board will assume the following functions:

* Harmonise strategies for the positioning of the projects as building blocks of EOSC
* Coordinate the liaison with RIs to get feedback on the proposed collaborative plan
* Work with relevant projects (such as EOSCpilot, eInfraCentral and prospective projects as they develop from WP18-20) to contribute to the respective developing governance frameworks.
* Find ways on how this strategy can align with national level (liaise with e-IRG and other initiatives, e.g., GO-FAIR).
* Steer and approve joint activities as proposed from Task Forces B (Communication, engagement, training) and C (Services) and other topics that are of common interest to both projects.

Assembly

The Cross-project Strategic Board will meet at least every 6 months, with a first meeting taking place no later than Q2 2018.

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# ARTICLE X. Rights of Access to Complementary Results

The beneficiaries give access to their results to complementary beneficiaries, for the purposes of the EOSC-hub and OpenAIRE actions and for implementing their own complementary tasks under the action. Access is given on a royalty-free basis.

COMPLETE

# ARTICLE. Rights of Access to Complementary Background

# ARTICLE. Confidentiality

# ARTICLE. Access to Project Deliverables

# ARTICLE. Dissemination and Publications

# ARTICLE. Intellectual Property Rights

## Exploitation and Dissemination of Results

The beneficiaries give each other — under fair and reasonable conditions — access to results needed for exploiting their own results.

COMPLETE

## Joint Ownership

# ARTICLE. Liability, warranties & penalties

# ARTICLE. Boilerplate Provisions

# ARTICLE. Amendments

# ARTICLE. Applicable Law and Settlement of Disputes

The Cross Project Strategic Board will decide areas of collaboration as defined within the collaboration agreement, as well as areas outside the scope of the collaboration agreement with the advice of the External Advisory Boards. Given the scope of the collaboration we do not foresee any areas of structural dispute; any legal disputes would be resolved under the applicable law of Belgium.

# ARTICLE. Entry into Force, Term, Termination, WIthdrawal

# ARTICLE. Accession

[Check if needed]

# ANNEX. Implementation

The present Annex presents the complementary activities and tasks that form the EOSC-hub/OpenAIRE-Advance joint work plan. The present work plan is expected to produce results for a broad range of stakeholders:

* Research Groups (Research Infrastructures, research projects, collaborations, the long tail of science)
* Decision Makers (funding agencies and policy makers at national and European level)
* Citizens
* Industry/SMEs
* Service Providers
* Content Providers
* Research & Admin. Managers

**DISCLAIMER: the activities and the timeline of expected outputs tentative and require assessment with Parties.**

## Joint Activity JA1: Service Integration

### Partners

TBD

### Objectives

From the architecture and service point of view, goal of this activity is to support the publishing of research/scientific products (research data, research software, experiments, research objects, etc.) in a FAIR way so as to lower the barriers for scientific communities to make research products more findable and discoverable to a larger scientific community, and to increase the uptake of open science by enabling the use and reuse of a wider range of scientific outputs. Service Integration will also facilitate the adoption of data management plans.

(i) foster and facilitate sharing and reuse of all products of science,

(ii) support reproducibility of science and transparent evaluation of the scientific process, and (iii) enable fully-fledged scientific reward mechanisms.

The high level goals can be broken down into the following use cases, which will drive the technical work detailed below:

1. Researchers depositing publications in OpenAIRE can include references to datasets and application services within the papers, pointing to datasets and services stored in EOSC-hub.
2. Researchers can import datasets from OpenAIRE (Zenodo) into EOSC-hub compute and application service to carry out data analysis with them.
3. Researchers can export analysis result data from EOSC-hub compute and application services to OpenAIRE (Zenodo) to share these data with broader audiences.
4. Enabling OpenAIRE users to collect and visualise research impact data about the use of data and application services that are federated in EOSC-hub.
5. Providing coherent, integrated information and support for RDM for researchers and projects, irrespectively whether they contact OpenAIRE or EOSC-hub..

### Task JA1.1 Facilitating interoperability across EOSC services in favour of Open Science

Crucial for enabling sharing and discovery of scientific outcome and possibly reproducibility of science is to ensure common practices to expose, access and defining citation metadata and link metadata for literature, datasets, and software. Another key objective is to enable collection/aggregation of usage stats from content providers about all products of science, e.g. literature, datasets, software, research objects. This activity is crucial to enable definition of new citation/quality indexes for science and come up with Open Science-flavoured research impact.

#### JA1.1.1 Define and promote guidelines for scientific product content providers in EOSC

OpenAIRE defines and fosters guidelines for scholarly content providers (<https://guidelines.openaire.eu/en/latest/>) which establish metadata formats for specific kinds of providers (publication repositories, data repositories, software repositories, CRIS systems, and repositories of “other products”, i.e. different from the previous ones).

Other guidelines can be defined (prior verification of effective demand), for example “guidelines for Communities” (identities and PIDs for research communities), “guidelines for Virtual Appliances”, and “guidelines for sharing usage statistics” of datasets.

EOSC-Hub and OpenAIRE will promote OpenAIRE guidelines and EOSC-defined guidelines providing technical support for their adoption across EOSC service content providers.

**Services involved:** technical support/help-desks of EOSC-hub and OpenAIRE

**Actions planned***:*

* *Identify and recommend exchange protocols for accessing metadata* (OAI-PMH, FTP, REsourceSync).
* *EOSC guidelines for communities***:** To have a common encoding and understanding of community identity and descriptions across EOSC services
* *EOSC guidelines for Virtual Appliances providers*: investigate the demand/conditions and needs of defining such guidelines and, if this is the case, define them
* *Define common guidelines for measuring usage statistics***:** Starting from the OpenAIRE Usage Stats guidelines, establishing common guidelines across communities and adapt EOSC and OpenAIRE usage stats services to these guidelines. This is an area in which EOSC-hub and OpenAIRE can collaborate with RDA to establish these common guidelines. At the last RDA Plenary there was a BoF on Making Data Count (<https://www.rd-alliance.org/make-data-count-rda-10th-plenary-bof-meeting>).

#### JRA1.1.2 Fostering and adoption of Machine-consumable Data Management Plans

The EUDAT/OpenAIRE FAIR DMP Tool should be offered to EOSC researchers, recommending its usage in a way that is integrated as possible with EOSC services such as EUDAT DPMT tool, OpenAIRE Aggregation Services, and EGI services.

**Services involved:** EUDAT/OpenAIRE Data Management Tool, EUDAT DPM Tool, OpenAIRE Aggregation Services

**Actions planned***:*

* Piloting the FAIR DMP Tool
* Operating in production the FAIR DMP Tool
* Exploring integration of FAIR DMP Tool with EUDAT DPMT Tool
* Publishing a textual version of DMPs in the FAIR DMP Tool in OpenAIRE Zenodo
* Exploring integration with EGI services

### Task JA1.2 Facilitating publishing and exchanging scientific products in EOSC

Providing publishing tools is often a limit for RIs whose main focus is on supporting the scientific process rather than scholarly communication practices. This often impacts on the capacity/ability of a scientific community to implement Open Science publishing practices:

* *Lack of reward:* publishing dataset metadata in a complete manner takes time and no reward;
* *Publishing fragmentation*: lack of “thematic” sources where to store datasets and software tools implies scientific products for a community are hard to find and share;
* *Scholarly sources as siloses*: when thematic sources are available, they do not implement/adopt techniques for interlinking the products they store or keeping such links up to date with the evolution of science. Sources typically act as freezers for science, and preserve science as it was at time t.

To support Research Communities with Open Science publishing tools integrated with RI services, the following steps are taken.

#### JA1.2.1 Aligning EOSC services to OpenAIRE guidelines and EOSC guidelines

EOSC-hub services for the management of the different scientific products must be adapted according to the guidelines promoted and defined in CA1. Services in scope are: EGI DataHub, AppDB, EUDAT B2FIND, B2SHARE. By adopting the guidelines, EOSC services will contribute their content to the OpenAIRE Research Community Dashboards of the different communities they support and implicitly report directly to the Commission (via OpenAIRE) their results.

**Services involved:** OpenAIRE Research Community Dashboard, EUDAT B2FIND, EUDAT B2SHARE, EGI DataHub, EGI AppDB

**Actions planned***:*

* *Adopting OpenAIRE and EOSC guidelines for data archives, software repositories, “other repositories” and (if required) for Virtual Appliances***:** EGI DataHub, EUDAT B2FIND, EUDAT B2SHARE, EGI AppDB metadata features of the EGI DataHub must be adapted to the respective OpenAIRE or EOSC guidelines for metadata export
* *Integration with OpenAIRE Research Community Dashboard***:** To enable harvesting, interlinking and viewing of metadata on scientific products from EOSC-Hub services the Research Community Dashboard must be properly configured

#### JA1.2.2 Equipping EOSC-Hub services with annotation functionalities

The ability to annotate scientific products (add properties, values or tags to their metadata) and sharing such annotation is key to capture the dynamic and evolving facets of science and make them useful input for researchers. EUDAT B2NOTE service could be used across EOSC-hub services as a mean to share annotations across different repository services.

**Services involved:** EUDAT B2NOTE, OpenAIRE Research Community Dashboard, OpenAIRE Zenodo, EUDAT B2FIND, EGI DataHub

**Actions planned***:*

* *Integrate EUDAT B2NOTE with OpenAIRE RCD***:** Integrate the OpenAIRE RCD service with the B2NOTE semantic annotation service
* *Integrate EUDAT B2NOTE with OpenAIRE Zenodo***:** Integrate the OpenAIRE Zenodo repository service with the B2NOTE semantic annotation service
* *Integrate EUDAT B2NOTE with EUDAT B2FIND***:** Integrate the EUDAT B2FIND metadata catalogue with the B2NOTE semantic annotation service
* *Integrate EUDAT B2NOTE with EGI DataHub***:** Integrate the EGI DataHub data service with the B2NOTE semantic annotation service

#### JA1.2.3 Aligning EOSC services to community guidelines

Sharing a common understanding of the notion of community is crucial to be able to offer interoperable services. This task will make sure the guidelines for communities defined in CA1 are adopted across EOSC-hub services and used to provide community-profiled metadata to the OpenAIRE Research Community Dashboard.

**Services involved:** OpenAIRE Research Community Dashboard, OpenAIRE Zenodo, EUDAT B2FIND, EUDAT B2SHARE, EGI DataHub, EGI AppDB

Actions planned:

* *Align EOSC-hub services with guidelines for communities***:** making sure the OpenAIRE Research COmmunity Dashboard, OpenAIRE Zenodo, EUDAT B2FIND, EUDAT B2SHARE, EGI DataHub, EGI AppDB adopt a common understanding and encoding of community guidelines

#### JA1.2.4 Usage of scientific product repositories for research communities

OpenAIRE, EGI and EUDAT offer data repository services (Zenodo, B2SHARE, DataHub) to support the management of and to improve the quality, findability and reuse of scientific products in a FAIR way. To broaden the usage of the repository services these will be registered to the EOSC Service Catalogue (SC) and promoted to support communities and the long tail users for the different targeted use cases.

**Services involved**: OpenAIRE Zenodo, EUDAT B2SHARE, B2SAFE, EUDAT B2FIND, EGI AppDB, EGI DataHub, EGI Cloud Compute

**Actions planned***:*

* *Registration of EOSC repository services into the EOSC-hub catalogue*
* *EOSC-hub to promote existing solutions to publish scientific products (and their peculiarities) to communities***:**OpenAIRE Zenodo, EUDAT B2SHARE,EUDAT B2FIND, EGI AppDB, EGI DataHub as data store
* *Integration of repositories in OpenAIRE***:** B2FIND can expose metadata to OpenAIRE with tags relative to specific communities and therefore contribute to the Research Community Dashboard.
* *Integrate EGI cloud computing services with data repositories*: Demonstrate transparent access and usage of data sets stored within the OpenAIRE Zenodo, B2SHARE, B2SAFE, EGI DataHub from the EGI Cloud Compute and Cloud Container compute services.

#### JA1.2.5 Brokering services for scholarly communication

The aim is for RIs and scholarly communication data sources to pro-actively share information about their scientific products (literature, datasets, software, tools) and the links between them. Any customer interested in being up to date with the evolving scientific scenarios can request to be notified about specific changes in RIs, services, sources, or specific products.

**Services involved:** OpenAIRE Broker Service, EGI DataHub, AppDB, EUDAT B2FIND, B2SHARE

**Actions planned***:*

* *OpenAIRE Brokering Services (Enabling brokering of metadata information and scholarly links across scholarly communication providers)***:** EOSC-Hub may advertise and advocate the adoption of the Broker Service across EOSC-Hub sources and services: EGI DataHub, AppDB, EUDAT B2FIND, B2SHARE

### Task JA1.3 Towards an Open Science-oriented Scientific Impact

#### JA 1.3.1 Adoption of standard/best practices for usage statistics in EOSC-hub services

The objective is to pilot the collection/aggregation of usage stats (as defined in CA1) from EOSC services (content providers) about all products of science, e.g. literature, datasets, software, research objects.

**Services involved:** OpenAIRE usage Statistics, AppDB, DataHub, EUDAT Accounting system, B2SHARE, B2SAFE

**Actions planned**:

* *Adapting EOSC-hub services to support common Usage Stats guidelines***:** To enable measuring of usage statistics the different EOSC services (EGI Accounting system, AppDB, DataHub, EUDAT Accounting system, B2SHARE, B2SAFE) must be adapted to make use of the defined guidelines.
* *Adapting OpenAIRE Usage Stats service to collect usage stats from EOSC-hub services*: If more data and metadata within EOSC-hub is made harvestable EOSC-hub can make use of the processing of OpenAIRE to support scientific impact for communities and how such research impact is related with funding from the Commission or other National funders in OpenAIRE. Via the OpenAIRE machinery collected usage stats from several sources on scientific products can be aggregated by OpenAIRE. The OpenAIRE Usage Stats service already does this for publications.

### Task JA1.4 Enabling Services in support of EOSC

#### JA1.4.1 Enabling single sign-on across scientific services

The integrated EOSC-hub AAI, which includes both EGI Check-in and EUDAT B2ACCESS services, could be integrated into the OpenAIRE AAI services to offer to the customers a seamless access to the service catalogues of the two projects

**Services involved:** EGI Check-in, EUDAT B2ACCESS, OpenAIRE AAI Services

Actions planned:

* Enable access to the OpenAIRE services via the EOSC-hub federate AAI

#### JA1.4.2 Generation of PIDs for long-tail of science sources of scientific products

Benefiting from the offer of PID services (e.g. DataCite, CrossRef) is not a trivial process for a scientific product data source. Hence, an RI may deliver a very useful database or repository service for the community but judge its integration with PID is not sustainable in terms of cost.

**Services involved:** EUDAT B2HANDLE, OpenAIRE aggregation services

Actions planned:

* *Automatic PID generation on scientific data sources without registered PIDs***:** The use of persistent identifiers, compared to local identifiers, is not yet a common practice within scientific repositories. To extend the usage of PIDs many of these services and technologies must be adapted. To lower the barrier for repository owners to use PIDs the OpenAIRE aggregation workflows can offer an out-of-the-box service for generation/management of PIDs to interested data sources by automatic registering PIDs to data services missing PIDs into the EUDAT B2HANDLE service.

#### JA1.4.3 Sensitive Data Services

EOSC-hub activities are planned to enable Sensitive data services to the EOSC scientific communities. OpenAIRE has developed the Amnesia Service, currently in beta state. EOSC-Hub/OpenAIRE can promote the OpenAIRE Amnesia service to research communities to have data properly anonymized to a given degree of anonymization.

**Services involved:** EOSC-Hub sensitive data services, OpenAIRE Amnesia Service

Actions planned:

* Pilot/promote EOSC-hub sensitive data services with the OpenAIRE Amnesia Service

### Work plan

|  |  |  |
| --- | --- | --- |
| **Activities** | **Type of output & Relevant Stakeholders** | **Timeline (Project Month)** |
| **CA1 Facilitating interoperability across EOSC services in favour of Open Science** |
| ***CA1.1 Define and support guidelines for scientific product content providers in EOSC*** Set of guidelines on how to export metadata about scientific products based on classes of providers (e.g. providers of literature, datasets, software, virtual appliances products)Set of guidelines for formatting usage statistics for scientific products to measure scientific impactSpecifications of a common encoding and understanding of community identity and descriptions across EOSC services | **Documents**Stakeholders: content providers (data providers, software providers, publishers) can expose metadata about the scientific products they contain in a uniform and broadly accepted format/structure, thereby maximizing accessibility, interoperability, findability (hence visibility of products and content providers); SMEs can count on standards for metadata exchange**Specifications for usage stats sharing**Stakeholders: content providers, researchers, organizations, funders for research impact evaluation of their products; SMEs to build advance services for research impact evaluation;**Specifications for community identification and relationships**Stakeholders: researchers, service providers | *M6: Promote and provide technical support to OpenAIRE guidelines for Data Archives within EOSC**M6: Identify and recommend exchange protocols for accessing metadata* (OAI-PMH, FTP, REsourceSync). *M12: EOSC guidelines for communities**M12: EOSC guidelines for Virtual Appliances providers*: investigate the demand/conditions and needs of defining such guidelines and, if this is the case, define them *M18: Define common guidelines for measuring usage statistics**M24: Define EOSC guidelines to describe communities* |
| ***CA1.2 Fostering the adoption of machine-consumable Data Management Plans*** | **Service**Stakeholders: researchers, data stewards, content providers, funders | *M9: Pilot the FAIR DMP Too**M19: Operate in production the FAIR DMP Tool**M24: Explore integration of FAIR DMP Tool with EUDAT DPMT Tool**M30: Publish a textual version of DMPs in the FAIR DMP Tool in OpenAIRE Zenodo**M30: Exploring integration with EGI services* |
| **CA2 Facilitating publishing and exchanging scientific products in EOSC** |
| ***CA2.1 Aligning EOSC services to OpenAIRE guidelines and EOSC guidelines***  | **Service**Stakeholders: Researchers while performing their scientific process using EOSC-Hub services can (i) implicitly/automatically publish and report their scientific products to the funders while (ii) sharing their products within their community) | *M12-M18: EOSC-hub services adopting OpenAIRE guidelines for data archives, software repositories, “other repositories” and EOSC-Hub/OpenAIRE guidelines (if required) for Virtual Appliances**M24: Aggregating EOSC-Hub services complying to guidelines with OpenAIRE Research Community Dashboard* |
| ***CA2.2 Equipping EOSC-hub services with annotation functionalities*** | **Service**Stakeholders: researchers share annotations and can benefit from other’s; service providers and SMEs can benefit from such content to provide advanced services for scientists | *M12: Integrate EUDAT B2NOTE with EUDAT B2FIND**M24: Integrate EUDAT B2NOTE with OpenAIRE Research Community Dashboard*tbd*: Integrate EUDAT B2NOTE with OpenAIRE Zenodo*tbd*: Integrate EUDAT B2NOTE with EGI DataHub* |
| ***CA2.3 Aligning EOSC-hub services to EOSC community guidelines***Identify common encoding, identities (PIDs), and relationships between “communities” to enable a common understanding of this concept across EOSC services  | **Service** Stakeholders: researchers will benefit from accessing EOSC services whose outcome (scientific products) are aligned with a common understanding of “research community”; services as well as products will be associated to one or more community enabling community-driven discovery and provenance information. | tbd*: EUDAT B2SHARE to support EOSC guidelines for communities*tbd*: EUDAT B2FIND to support EOSC guidelines for communities*tbd*: EUDAT DPMT to support EOSC guidelines for communities*tbd*: OpenAIRE Research Dashboard to support EOSC guidelines for communities* |
| ***CA2.4 Usage of scientific product repositories for communities***Facilitate access to repositories of scientific products for the communities | **Service** Stakeholders: researchers will be presented with a variety of solutions where to publish their scientific products. In addition they will be able to access data repositories from the EGI Cloud Computing services | *M6: Demonstrate access from EGI FedCloud to EGI DataHub**M9: Demonstrate access from EGI FedCloud to EUDAT B2STAGE/B2SAFE**M12: Demonstrate access from EGI FedCloud to EUDAT B2SHARE**M12: Include OpenAIRE Zenodo as EOSC catch-all Repository for individual researcher into EOSC Service Catalogue**M12: Include EUDAT B2SHARE as data repository into EOSC Service Catalogue**M12: Include EGI DataHub as data platform into EOSC Service Catalogue**M12: Include EGI AppDB as software and virtual appliances platform into EOSC Service Catalogue**M18: Demonstrate access from EGI FedCloud to OpenAIRE Zenodo* |
| ***CA2.5 Use Brokering services for scholarly communication*** | **Service** Stakeholders: content providers which will complete, keep up-to-date, enrich their collections in (almost) real-time and the researchers accessing such content providers | tbd*: Integrate OpenAIRE brokering service with EGI DataHub*tbd*: Integrate OpenAIRE brokering service with EGI AppDB*tbd*: Integrate OpenAIRE brokering service with EUDAT B2FIND*tbd*: Integrate OpenAIRE brokering service with EUDAT B2SHARE* |
| **CA3 Towards an Open Science-oriented Scientific Impact in EOSC** |
| **CA3.1 Adoption of standard/best practices for usage statistics in EOSC-hub services** | **Service** Stakeholders: researchers can access scientific products together with their usage stats, researchers authoring scientific products different from literature can benefit from new measures of quality, service providers can define quality metrics and relative tools for open science (taking into account all products and their usage stats) | *M30: Align EGI Accounting system to new usage statistic metrics**M30: Align EGI AppDB to new usage statistic metrics**M30: Align EGI DataHub to new usage statistic metrics**M30: Align EUDAT Accounting system to new usage statistic metrics**M30: Align EUDAT B2SHARE to new usage statistics**M30: Align EUDAT B2SAFE to new usage statistics**M36: Adapt OpenAIRE Usage Stats service to collect usage statistics on different products of science**M36: Adapt OpenAIRE Usage Stats service to collect usage statistics from EOSC-hub services* |
| **CA4 Enabling services to support EOSC** |
| **CA4.1 Integration of the OpenAIRE AAI with EOSC-hub AAI** | **Service** Stakeholders: researchers can benefit from single-sign on across EOSC services; service providers can offer services easily accessible from researchers  | M9: integrating AAI from EOSC-Hub and OpenAIRE-Advance |
| **CA4.2 Integrate B2HANDLE with OpenAIRE aggregation service for automatics PID generation** | **Service** Stakeholders: Content providers which can outsource PID/handle management functionalities | tbd: provision of PID minting as-a-service |
| **CA4.3 Pilot and demonstrate OpenAIRE Amnesia service within the EOSC-hub Sensitive Data Services** | **Service** Stakeholders: researchers in the need of anonymizing data | tbd: adoption of OpenAIRE Amnesia in the portfolio of EOSC-hub services for sensitive data |

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#### User stories

* For stakeholder …:
* For stakeholder …:

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#### Comments on efforts

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## Joint Activity 2: Communication, Engagement, Support and Training

### Partners

TBD

### Objectives

Even the best services don’t sell themselves, and researchers will only benefit from them and from EOSC at large when we manage to get them interested in the benefits of carrying out a good Data Management Plan. The objective of this work package is to achieve this: by reaching out to various stakeholders and getting them engaged, as well as by organising different kinds of events to transfer information and knowledge that meet the needs in different communities.

### Task JA2.1 Communication

This task will be responsible for establishing and implementing the joint communication plan. The plan will define actions to communicating and disseminating the result of the collaboration to internal and external stakeholders of the two consortia. The actions will define ‘what’, ‘who’, ‘for who’, and ‘how’ will be communicated. The initial plan will be based on this Collaboration Agreement, but will exist as a living document that is revised and enriched continuously by the CWPs.

### Task JA2.2 Training & Support

This task will train researchers and research community leaders on Open and FAIR research data management. This training will be via webinars and face-to-face training events. To support an efficient knowledge transfer and increase impact, so called “ambassadors” will be trained as well. Content and service providers can learn how to comply with relevant guidelines. Also, the two helpdesks will be integrated to provide with a single-entry point for requests from end users.

### Task JA2.3 Events

This task will set up the workflows for joint planning, programming, promotion, hosting, and gathering feedback for all events, training, workshops, webinars. Major events will be the annual DI4R conferences and the International Open Access week.

### Work plan

Note: Please note that this table is sorted by time, not by task.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Key exploitable result** | **Type of result & concerned stakeholders** | **Timeline (Project Month)** | **Impact** | **EOSC-hub/OpenAIRE Advance relevant milestones/deliverables** |
| Collaborative online presence | Online avenues: Newsletter, Social Media | M01 | Researchers and service providers learn about the projects boosting EOSC | OpenAIRE T2.1EOSC hub T3.3. |
| Joint helpdesk, a dispatch service to direct requests to the competent party | A dispatch service | Starting in M01 | “One-stop shop” | EOSC hub 5.5OpenAIRE T4.1 |
| Event Organisation Process | Internal Document with internal events and external events we may want to join | M02 | Internal impact: cross-project efficiency | EOSC hub T3.4,  |
| Joint Training and Events Schedule (to populate event calendars) | Internal and public document | M03 | Internal impact: cross-project efficiency External impact: harmonised event notification for stakeholders  | OpenAIRE T4.3EOSC hub T3.4, T11.1  |
| Joint training on Open and FAIR RDM.After M18 (to be aligned with team C planning) this can include the joint DMP tool.  | 2 webinars per year: one generic and one discipline-specific | Starting in M04  | Skills improvement, “agile career development” | EOSC hub T11.2OpenAIRE T4.2 |
| Consultation exercise with common Research Infrastructures (DARIAH, EPOS, ELIXIR) | Initial set of requirements for joint use | M05 | EXTERNAL: Efficiency for RI representatives through joint requirement management approach.INTERNAL: Valuable input for the projects. | EOSC hub T8.1, T8.5, T7.8OpenAIRE T7.3, T8.1 |
| Train the “ambassadors”: NOADs, NGIs, community leaders, RI representatives | 2 webinars per year  | Starting in M10 | Increased impact through multipliers, with possibilities for discipline-specific extensions | EOSC hub T11.1, T11.4 OpenAIRE T4.2, T4.3 |
| F2F workshops at the DI4R  |  | Annually in October | Improved skills in applying the services |  |
| Displaying the common training resources as well as endorsed/recommended training resources from the other project | Training resources are mutually displayed on each others webpage | First version 12Updates M24, M36 | Increased efficiency (“one-stop shop” like) for researchers and community leaders in need of training. | EOSC hub T11.1OpenAIRE T4.2, T4.3 |
| Plans for joint infrastructure uptake by common Research Infrastructures (DARIAH, EPOS, ELIXIR) | Uptake plans | M13 | EXTERNAL: Efficiency for RI representatives through joint requirement management approach.INTERNAL: Valuable input for the projects. | EOSC hub T8.1, T8.5, T7.8OpenAIRE T7.3, T8.1, T4.3 |
| Joint use of EOSC-hub and OpenAIRE-Advance services by common RIs | Joint uptake by ELIXIR, EPOS, DARIAH | M24 | Reproducible science for Life Sciences, Earth sciences and Digital Humanities  | EOSC hub T8.1, T8.5, T7.8OpenAIRE T7.3, T8.1, T4.3 |
| Train content & service providers (repositories) on complying with joint guidelines | F2F provider integration workshops, like the DI4R2016 “Design your infrastructure” workshop;Stakeholders shift over time from projects internal stakeholders to newly joining providers | F2F workshops: one in year 2, one in year 3  | Skills improvement, increased uptake of the services | EOSC hub T11.1, T11.4 OpenAIRE T4.2, T4.3(Note: aim for repurposing the ambassador webinars) |

####

#### User stories

* For stakeholder researchers: Find and use the best combination of services to create and implement a Data Management Plan! This CWP will offer joint user support, training events, conferences, user guides and manuals for researchers. Moreover, the projects will collaboratively support three common RI communities (ELIXIR, EPOS, DARIAH) and pro-actively reach out and engage with additional structured, as well as long-tail research groups.
* For stakeholder repository manager: Would you like to see more people using the content in your holdings? Make sure to comply with the guidelines endorsed by OpenAIRE Advance and EOSC-hub. We can help you to set it up.
* For stakeholder Funder: Would you like to have an overview of your programme outputs? This collaboration provides the support necessary to measure return on investment, contextualise your research.
* For stakeholder SMEs: Would you like to have an international R&D team to work on your products and services? We can get you into contact with European-funded projects, which will help you to validate your product or service.

#### Comments on efforts

##

## Joint Activity 3: Governance

### Partners

TBD

### Objective

Ensure strategic alignment between the two projects including but not limited to community engagement, service development, and service positioning and sustainability within the EOSC.

### Task JA3.1 Strategy

|  |  |  |
| --- | --- | --- |
| **Milestone** | **Timeline****(Project Month)** | **Related Project Milestones (EOSC-Hub\****OpenAire-Advance)** |
| Cross-Project Strategic Board membership finalised, common work plan, detailed functions and timeline | 3 |  |
| Review of Advisory Board Requirements and setup of advisory board(s) based on this analysis | 6 |  |
| White paper outlining common vision for EOSC, service placement, and role in upcoming EOSC governance | 9 |  |
| Aligned roadmap(s) for service positioning and sustainability within EOSC | 18 |  |