# Task Force charter Rules of Participation Compliance Monitoring Draft v02 for Board assessment prior to symposium

**Main aims**

The aims of the TF are:

- To ensure that the entry requirements of EOSC bridge from the principles expressed in the current high-level EOSC RoP to more practical criteria for implementation in EOSC.
- To define at what level RoP and other entry requirements can be reasonably monitored, and set in place a framework to enable such monitoring alongside other key stakeholders and to create a structure for 'appeals' against exclusion from EOSC.
- To draw in community involvement in the setting of RoP and other entry requirements from the EOSC community.
- To establish a durable structure that can take on the ongoing activities and continue them after the task force concludes, through an RoP Board as proposed by the Working Group on Rules of Participation[1].

**Core activities**

The Key outputs of the TF are divided into three phases:

Phase 1:

- An 'RoP Architecture' (structure of the rules): A high level of view of RoP and entry requirements which puts our work in context with what has gone before and what is needed for practical implementation by EOSC Catalogues
- A definition of what is an EOSC Catalogue, how this can be assessed, and a list of such catalogues with an agreement structure to support connection between catalogues. This should take into account the implications of different catalogue ownership models.
- A list of the proposed or requested inputs from other task forces needed to form the expanded RoP.

Phase 2:

- An expanded 'RoP' which provides more specific criteria or requirements that catalogues must find a way to check for providers and resources.
- A monitoring plan which sets out the level at which monitoring will be performed and the activities needed to perform it. This must also include resourcing and staffing the monitoring.

Phase 3:

- An initial 'EOSC Appeal' group with a basic set of procedures and a method to be contacted.

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[1] https://docs.google.com/document/d/1j54kotech-hDcYTKkcqRePoJfu8X1c5ugTaCwxltAyM/edit

- Propose the setup of an RoP Board to the Advisory Group and Association to take on the work of the taskforce after it concludes. Pending Board approval, support the launch of this board.
- Based on all the above, a set of contributions to SRIA 2.0

It would be ideal to have phase 1 in draft form shortly after the EOSC Symposium, and before the summer break, then work to finalise them and move on to the Expanded RoP and Monitoring plan, with the intention to deliver phase 2 in Autumn 2021. Phase 3 can be worked on in alte 2021 to provide SRIA input this year, and into 2022.

### Planned duration
The task force is intended to run for 24 months, from May 2021 to April 2023. In parallel, we see the need for the creation of a durable permanent body (within the Association) to manage ongoing issues related to RoP and entry requirements, including change of RoP, monitoring, and appealing exclusions. Once such a body is operating fully the task force could execute a handover to it and conclude.

### Working methodology
We foresee initial weekly meetings of the TF, expanding to biweekly once things are settled. Slack will be used for additional communication.

Initial work will be compiled by the TF members, and presented as an initial view/proposal to the wider Association community (at the Symposium).

Following this new and updated rules and monitoring systems need to be created, and these will require a greater level of community review. Focus groups/compact workshops with catalogue owners will be required to understand what issues they face, and what is realistically implementable. Likewise we will have to operate some workshops with providers and research communities (perhaps supported by the projects) to understand what criteria they can realistically meet and expect.

### Dependencies
There is a dependency or link to the EOSC Provider and Resource Profiles, which are filled in by providers, in use by EOSC Enhance, EOSC Future and increasingly by other catalogue owners. While the TF-RoPCM is not the 'owner' of the profiles, we must align these efforts as the required fields in the profiles represent a large amount of the 'basic' RoP or entry requirements in practice.

Many if not most other task forces will provide input to the RoP, e.g. rules on PIDs from the PID task force. We must incorporate these outputs as rules as appropriate, and put in place mechanisms to monitor them. To support this, we must also provide input to these other groups on how they can ensure they produce monitorable outputs. A list of expected interactions is part of phase 1 of our planned work.

**Membership**

This initial membership should be made up of the volunteers from the call for participation, but we should invite representatives of key stakeholders, especially major catalogue owners (currently projects), to be a part of the effort. We should also invite some key staff from major implementation projects, from the ESFRIs, and some representative service providers. This can be achieved by the second call for participants.