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HE EOSC PARTNERSHIP Additional Activities Plan 2024

Survey guidance materials (updated: 27.06.2023)



speose Table of content

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1. MoU between the EOSC-A and the EU (30th of July 2021)

Obligations:

- Monitoring Framework (KPIs)
- Report on delivery of in-kind contributions and investments to additional activities
- Provide Impact Use Cases

EN Annex 5

Memorandum of Understanding for the Co-programmed European Partnership for the European Open Science Cloud (EOSC)

The European Open Science Cloud Association, representing the partners other than the Union (its constituent entities¹), the registered offices of which are in Rue du Trône 62, 1050 Bruxelles, hereafter referred to as the "Partners other than the Union", and the European Union, represented by the European Commission, (jointly hereinafter referred to as "the Partners"),

Considering that:

- Parts of Horizon Europe the Framework Programme for Research and Innovation ('Horizon Europe') ² – may be implemented through Co-Programmed European Partnerships, on the basis of a Memorandum of Understanding between Partners determined to support the development and implementation of research and innovation activities of strategic importance to enable the Union to address global challenges and maintain its competitiveness in line with EU priorities, including the Sustainable Development Goals;
- The Strategic Plan for Horizon Europe³ has identified a candidate for a Co-Programmed European Partnership for the European Open Science Cloud (EOSC) considered instrumental to deliver scientific, economic and societal impact in line with the Horizon Europe objectives;
- The proposal received from the Partners other than the Union has been positively assessed by the European Commission in that it fulfils the new ambition and the selection criteria referred to in Article 10 and Annex III of Regulation (EU) 2021/695 of the European Parliament and of the Council⁴ ('Horizon Europe');
- The implementation, monitoring and evaluation of the European Partnerships will comply with the criteria referred to in Annex III of Horizon Europe, including an alignment with Horizon Europe monitoring and evaluation provisions, set out in Article 50 and Article 52, as well as Annex V on Key Impact Pathways;
- The multi-annual Strategic Research and Innovation Agenda (SRIA) agreed by the Partners will provide the basis for the development of the co-operation under this

RTD DATE: 10/08/21

Constituent entities are the members of the Association.

² Regulation (EU) 2021/695 of the European Parliament and of the Council of 28 April 2021 establishing Horizon Europe – the Framework Programme for Research and Innovation, laying down its rules for participation and dissemination (OJ L 170, 12.5.2021, p. 1–68.)

https://op.europa.eu/en/web/eu-law-and-publications/publication-detail/-/publication/3c6ffd74-8ac3-11eb-b85c-01aa75ed71a1

⁴ OJ L 170, 12.5.2021, p. 1-68.

speose 1. MoU between the EOSC-A and the EU

According to EU - EOSC-A <u>Memorandum of Understanding (MoU)</u>, the EOSC-A and its Members have committed to:

- Deliver a volume of additional activities totalling to €500M over the duration of the EOSC Partnership (until the end of 2030), at a minimum
- Establish every year an 'Additional Activities Plan' (AAP)
- Report annually on provided contributions (€).

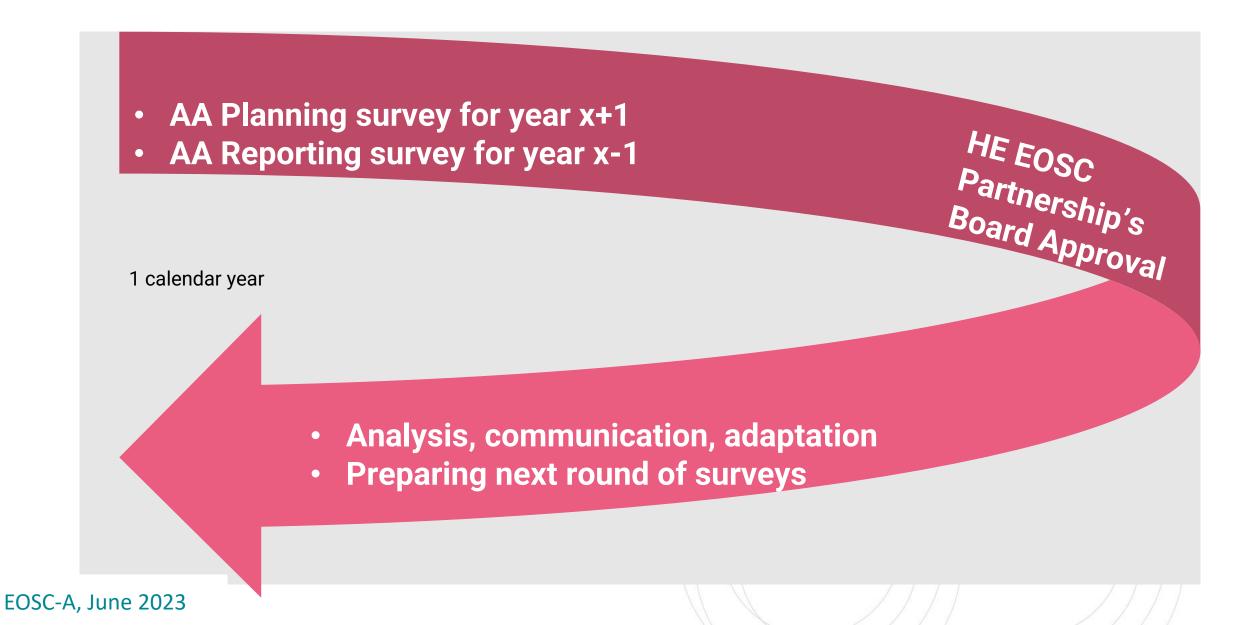


specification of additional activities

- Activities that are in scope with the <u>the EOSC Partnership Strategic</u> <u>Research and Innovation Agenda (SRIA)</u>
- Activities that are NOT covered by European Union funding (except for EC Structural Funds and Recovery and Resilience Facility)
- Activities and investments contributed in-kind or cash by the Members



meosc 3. AA Monitoring & Reporting Annual Cycle



specific contraction of additional activities

9 MAIN CATEGORIES



1. Support to additional R&I



2. Scale up of technologies



3. Demonstrators



4. Creating new business opportunities



5. Training & skills development



6. Contribution to development of new standards, regulations, and policies



7. Supporting ecosystem development



8. Communication, dissemination, awareness raising, citizen engagement



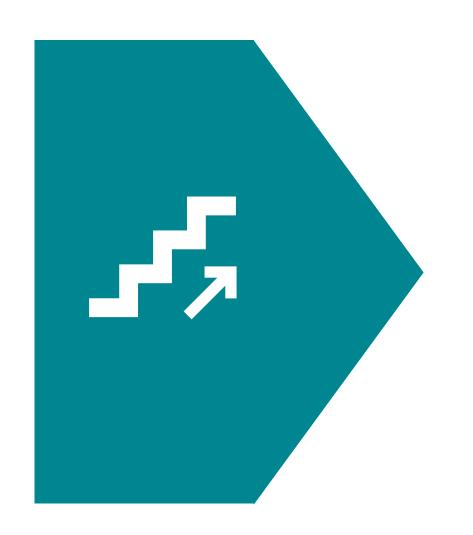
9. Other

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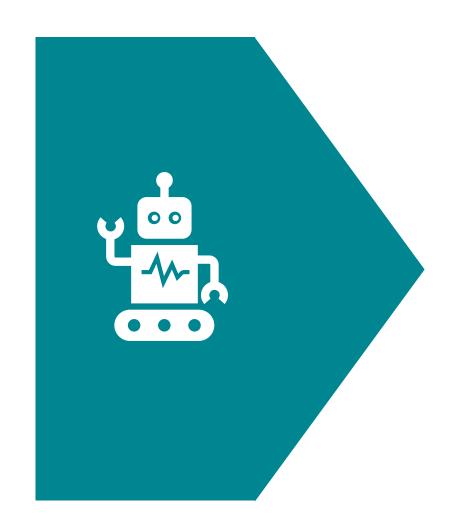
- Upgrade of <u>existing</u> research infrastructures and e-infrastructures that may be federated through EOSC
- Development and deployment of EOSCcompatible search engines
- Deployment of online tools for FAIRification
- Development and publication of large-scale studies
- Contribution to operating core functions of a Minimum Viable EOSC ecosystem

speose Category 2. Scale up of technologies



- Investment done complementing the results of a project, bringing it to a higher TRL level (e.g., EOSC thematic services) or to deployment
- Uptake of EOSC projects' outcomes

speose Category 3. Demonstrators



- Investment in <u>new</u> platforms, demonstrators, pilot use cases exploiting domain-specific user environments and supporting the EOSC vision
- New (pre-)commercial services and capabilities along the data life cycle

weosc Upgrade of existing research infrastructures (1.1) vs. investments in new platforms (3.1)

1.1 Upgrade of existing research(e)infrastructures that may be federated through EOSC

Upgrade # maintenance

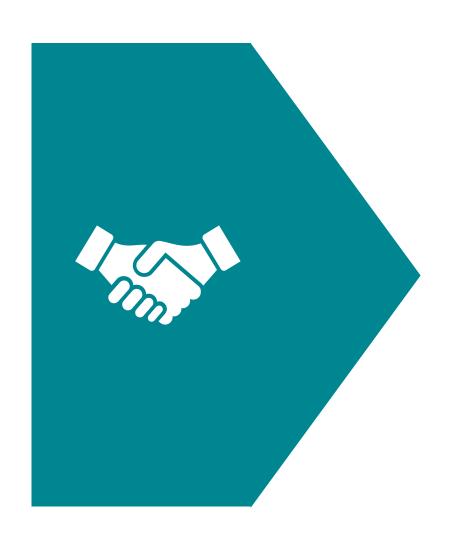
- Scale up the e-infrastructure capabilities of data centres and improving their connectivity with the EOSC and other European infrastructures
- Implementation of interfaces to integrate computer and data management solutions to ease access and reuse data
- Integration of FAIR-Data services in infrastructure

3.1 Investments in **new** platforms, demonstrators, pilot use cases

- Contribution to the development /
 establishment (e.g. of new data centres)/
 building (e.g. up-to-date infrastructure)
- Provision of funding for new infrastructures



speose Category 4. Creating new business opportunities



- Invest in start-ups, spin-offs on solutions developed within the projects
- Start incubators/accelerators
- Matchmaking between different start-ups, SMEs, participating companies, stakeholders
- Investments in procurement of innovative solutions

coeosc Category 5. Training & skills development



TYPES OF ACTIVITIES:

 Education, training and skills development in Open Science and FAIR data management of research artefacts

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All training-related activities planned by your organisation (despite the subject) should be indicated in category 5

- Organisation of a series of webinars and online course about the development of DMPs and Domain Data Protocols
- Development of domain specific 'Hands on Workshops (HOW)' on topics like implementing FAIR, semantics, particularities of RDM
- Training and dissemination activities among the national Ris connected to ESFRI
- Support Data Stewardship pilot course



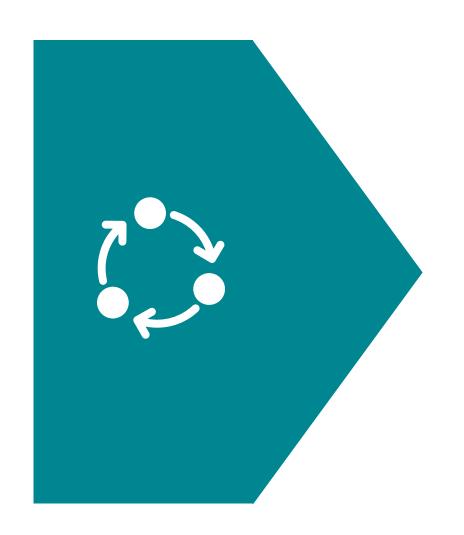
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Category 6. Contribution to the development of new standards, regulations, and policies



- Standardisation and certification activities related to EOSC trusted repositories (e.g. CoreTrustSeal)
- Contribution to the development of applicable FAIR guidelines and frameworks
- Continuous standardisation of persistent identifier
 (PID) resource types
- Support research communities to: develop and/or adopt domain- specific standards as well as to consolidate common metadata and/or data schema for use in the EOSC context

meosc Category 7. Supporting ecosystem development



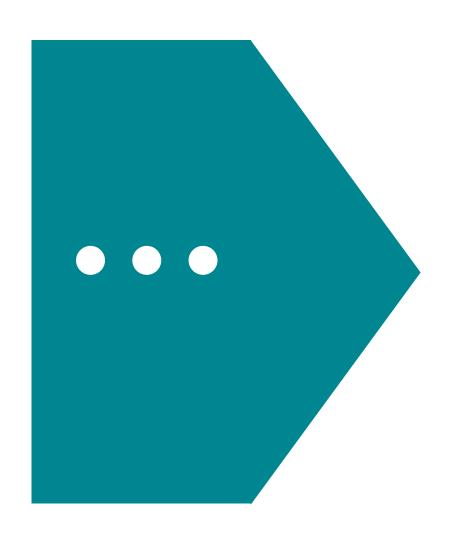
- Support to knowledge building and sharing across various research domains
- Building industry-academia cooperation (e.g. GAIA-X, HPC or other industry-driven initiatives)
- Activities contributing to strategic and operational alignment, coordination, or synergies with other structures such as Partnerships, Horizon Europe missions, data spaces etc.
- Being the contact point or coordination mechanisms for EOSC uptake at national or institutional level

coeosc Category 8. Communication, dissemination, awareness raising, citizen engagement



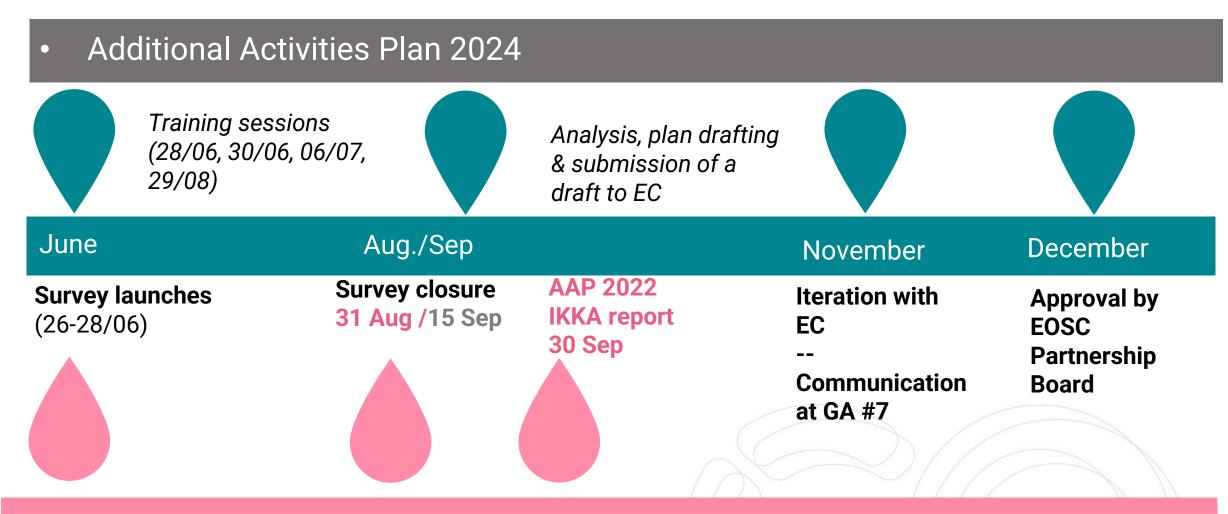
- EOSC-related communication, dissemination, outreach, and awareness raising activities
- Promoting EOSC at all levels by engaging with relevant communities and stakeholders

meosc Category 9. Other



- Introduction of EOSC-specific references in research programmes and EOSC-related criteria for R&I funding opportunities
- Activities supporting open access publishing through the EOSC
- Adoption of national or institutional strategies for digital transformation and related roadmaps
- Adoption of new (national) policies on Open Science
- Outreach for creating a global cooperation framework for Open Science infrastructures

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• Report on the Additional Activities Plan 2022

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- Extension of the time to complete the survey
- Limitation of survey burden
 - Optimisation and shortening of the questionnaire (categories 5, 6 and 7)
 - Exclusion of "other" type of activity (categories 1-8)

Technical improvements

- The format of data entered double-checked
- The template of the description of the activity provided
- More examples of the types of additional activities in categories
- A dedicated field for providing a different conversion factor for 1FTE (if different than 100k euro)
- A pdf copy of the questionnaire at any stage of work

coeosc 7. AAP 2024 survey: Structure

AAP 2024 survey

If: You did not take part in the AAP 2022 survey

Forecast contributions for 2024

Validation of contributions for 2022

..You will be asked to predict the 2024 figures

If: you did take part in the AAP 2022 survey

..You will be asked to predict the 2024 figures.. AND...

...You will receive the personalised instruction and ID to validate the previous values for AAP2022

coeosc 7. AAP 2022 survey: Structure



AAP 2024 and AAP 2022-report

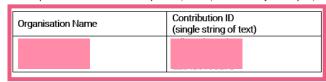
Dear Member of the EOSC Association.

We are delighted to announce the launch of the first survey for the reporting on the Additional Activities Plan 2022 (AAP2022-R), in combination with the survey for the Additional Activities Plan 2024 (AAP2024). We have organised this collection as a two-step survey, accessible through two different links, with different deadlines. Please, follow the personalised instructions, below, to ensure we can securely receive your information and that your contributions are eligible.

Additional Activities Plan 2022 - Report.

This reporting survey is open until the 31 of August. The deadline is fixed in order to importantly comply with the EC reporting timelines. Please, rest assured that we have poured significant effort to simplify the reporting procedure: you can simply accept your own previous submission; or: you can edit the submitted values, in case the plans materialised in a different form. We are grateful for your most sincere effort to meet this deadline, at the end of August. This reporting survey is individual and can only be securely access by you, as described, in detail, below:

- . Step I: Access the EUSurvey platform through the link: https://ec.europa.eu/eusurvey/home/editcontribution
- Step II: Enter the unique Contribution ID that we provide, below; it will allow you to open, review, and edit your AAP2022 survey submission.



- . Step III: Complete the CAPTCHA and click the "edit my contribution" button.
- Step IV: Review your answers regarding the 2022 forecasts and edit any values that have changed. At the beginning of the form, we kindly request the completion of contact details. Providing this information is voluntary but enables us to contact respondents later, so we encourage you to provide them. Personal information will be kept securely and will not be displayed publicly.
- Step V: After reviewing and making changes in the survey, please proceed to the end of the form and click the "submit" button.

NOTE: If all the data are valid, and thus no changes are required, you still must resubmit the survey, by clicking the "submit" button at the end

2. Additional Activities Plan 2024,

This survey is open until the 15th of September. We understand that establishing the AA plan requires time and attention and managed to relax this deadline, while still complying with the HE EOSC Partnership Monitoring Framework.

You may access the EUSurvey platform through this link: https://ec.europa.eu/eusurvey/runner/AAPsurvey2024

TRAINING OFFER:

In order to facilitate your submissions, we also have organised a series of AAP-survey training session, which you can reserve, through this webform: https://eosc.eu/form/aap-survey-training-

Your unique ID to secure, review and edit your data and contributions, as part of the instruction you received



coeosc 7. AAP 2024 survey: Structure

Start Privacy policy I. YOUR ORGANISATION PROFILE II. ADDITIONAL ACTIVITIES 2024 + ADDITIONAL ACTIVITIES 2022 - REPORT III. CASE STUDY

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8. AAP 2024 survey: Guidance

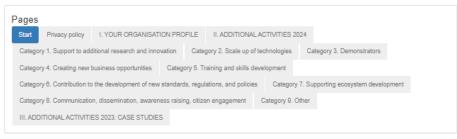




Start



EOSC ASSOCIATION Contributions to additional activities 2024 SURVEY





EOSC ASSOCIATION Contributions to additional activities 2024 SURVEY

Description

Dear EOSC Association Members, Dear Colleagues,

We, the EOSC Association and its Members, have committed to the European Union to deliver a volume of Additional Activities totalling to at least €500 million, over the duration of the, towards the objectives defined in our HE EOSC Partnership Memorandum of Understanding.

Additional Activities are defined as the contributions, either in in-kind or in monetary forms, which are NOT financed by the European Union (for example, through the Horizon Europe project grants).

The Additional Activities are to be monitored according to a framework established by the EC for all HE co-programmed partnerships, which includes:

- . an (ex-ante) annual forecast of the contributions, for the coming year (planning phase); and:
- a (ex-post) validation of the actual contributions, provided in the previous year.

The objective of this AAP 2024 survey is to define the budget resulting from the forecast provisions of Additional Activities by EOSC-Association Members, for 2024; and, ultimately, to present the "Additional Activities Plan" (AAP), for 2024, to the EC.

The questionnaire comprises three sections:

- · Section I 'Your organisation profile';
- Section II "Additional activities 2024", requesting information on forecast contributions for 2024; and:
 Section III "Additional activities 2024: case studies", asking for a detailed description of at least one flagship initiative among the planned activities
- . Respondents should only take the survey once. If you need to close the survey before you have finished, please save it as a draft (using the button on the right side of the screen). You will receive a link, which, at any moment, will take you back to back to your saved survey.
- All questions marked with a star sign (*) are mandatory.

The survey will remain open until the 15th of September. If you are likely to experience difficulties meeting this deadline, please, inform us, so we can find solutions.

Training sessions are available, please find a calendar and registration link, here: https://eosc.eu/form/aap-survey-training-sessions-

For any concern, please, contact us: monitoring@eosc.eu

Thank you for your participation, we truly appreciate your input.



Click to download the survey Click to save the draft

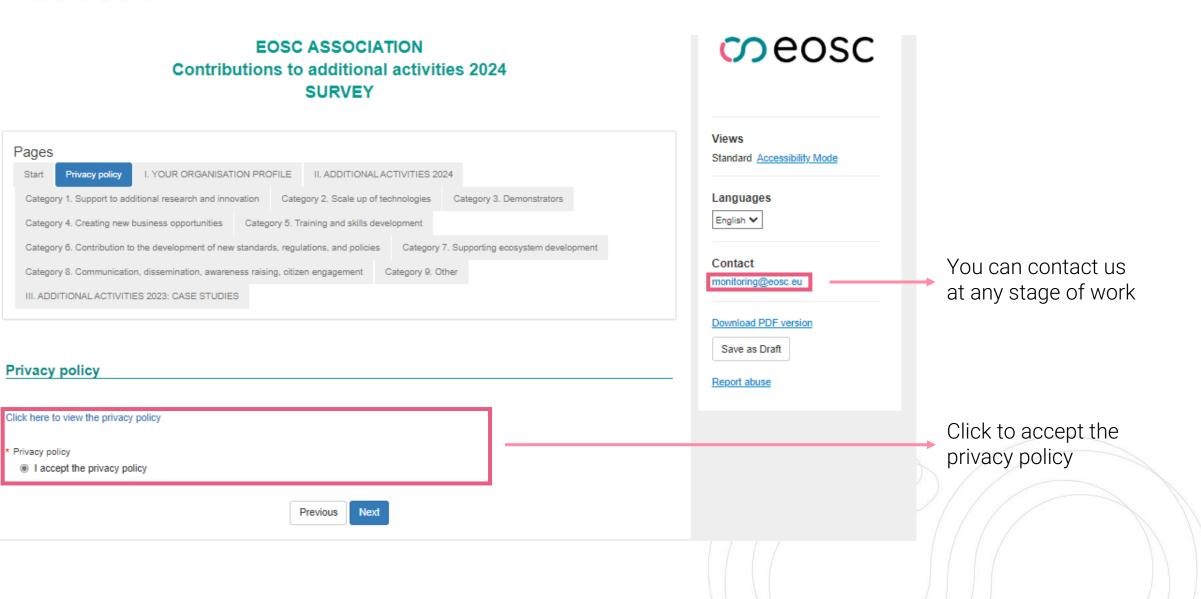
EOSC-A, June 2023



Privacy policy

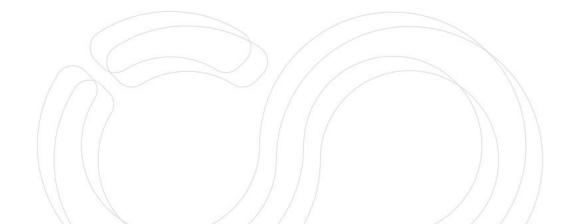








Section I. YOUR ORGANISATION PROFILE



I. YOUR ORGANISATION PROFILE

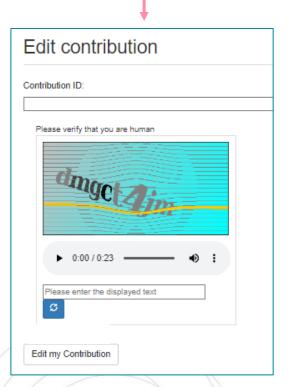
* For which organisation is the following information provided?
Hasselt University
nasseit University •
Organisation website In which country is your organisation located (country of residence of operating unit or headquarter)?
Is your organisation: national / EU / international? National EU International
Which category best describes your organisation? Research Funding Organisation Service Providing Organisations for Research (including research infrastructures) Research Performing Organisation (incl. umbrella organisation) Other, please specify
What is the nature of your organisation? Public Private Public-Private-Partnership Other
Please indicate your EOSC Association Status Member Mandated Member
Contact details
First name //
Last name //
E-mail adress
Phone number (please, use the following pattern: +00 000 000 000)

Previous

If you are filling in the part of the survey on the validation of the figures as of 2022, your organisation will be preselected after you enter your ID in the previous step

If you organisation is not in the drop-down list, select "Other" and enter the name in the box that will appear

Select "Research Performing Organisation" if you represent a university



Contact details will only be used in urgent cases double input, ambiguity in provided data, etc.) and are exclusively for the internal use of the EOSC-A



Section II. ADDITIONAL ACTIVITIES PLAN 2024 + ADDITIONAL ACTIVITIES 2022 - REPORT



EOSC ASSOCIATION Contributions to additional activities 2024 SURVEY

Pages							
Start	Privacy policy	I. YOUR ORGANISATI	ON PROFILE	II. ADDITIONAL AC	CTIVITIES 20	024	
Catego	ry 1. Support to add	ditional research and innov	ration Cate	egory 2. Scale up of tec	chnologies	Category 3. Demonstrators	
Category 4. Creating new business opportunities							
Category 6. Contribution to the development of new standards, regulations, and policies Category 7. Supporting ecosystem development							
Catego	ry 8. Communication	on, dissemination, awarene	ess raising, citiz	en engagement C	Category 9. C	Other	
III. ADD	DITIONAL ACTIVITI	ES 2023: CASE STUDIES					

II. ADDITIONAL ACTIVITIES 2024

Please note:

- In the table below nine categories are given by the European Commission in which our members are asked to indicate their planned additional
 activities. Each category lists also a certain number of applicable activity types, where you can describe your contributions.
- For each activity type that applies to your plans, in each category, please indicate the planned contribution, including in-kind contribution, for the calendar year 2024, in terms of:
 - . Full-Time Equivalents (FTEs); and:
 - The monetary value* (€) of the described activities, in addition to the FTEs (e.g.: costs of upgrading an infrastructure, cost of a license or a
 piece of equipment, cost of IP protection or spin-off initiatives, etc.).
- For your information, we will use a standard conversion factor of 100.000.00 Euro per 1 FTE (i.e.: 1 FTE = 100.000,00 EURO), to calculate
 the monetary value of your FTE contributions. If the applied conversion factor for 1 FTE is different than 100K euro, please indicate this
 value at the end of this section.
- For all the types of activities that apply to your AAP, please also provide a careful and concise description of the activity, highlighting their relevance to EOSC, and a relevant weblink (if available). One flagship initiative can be described in full details in the last section (III) of the survey.

* Is the applied conversion factor for 1 FTE equal to €100.000,00 Euro? ○ Yes, it is ■ No, it is different
* Please provide a conversion factor for 1 FTE: (no spaces, a dot as a separator for decimal places, e.g.: 100500.00 euro)
euro

Please note that a standard conversion factor is 1 FTE = 100.000 euro

If another conversion factor is needed, please provide it

Category 1. Support to additional research and innovation

This category covers the following additional (i.e., not funded through Horizon Europe/Horizon 2020 in the context of the partnership) activities:

- R&I activities funded by a public research funder which is a member of the EOSC Association; AND/OR:
- R&I activities executed by a public research performer which is a member of the EOSC Association, funded through for instance a regional or national R&I funding programme or its own institutional funding.
- Service provision activities (not funded through EU-programmes), which are relevant for and in line with the objectives of the EOSC partnership,
 executed by either private-nature or public nature entities, which are members of the EOSC Association, funded through, for instance, a regional or
 national R&I funding programme or own institutional funding.

Please note that:

- If a private-nature partner has received co-funding for a project from a public entity which IS a member of the EOSC Association, then the entire
 project should be counted in this category (also the part co-financed by the public entity).
- In this category, R&I should be understood as covering the full range of TRL levels.

Is the following activity applicable to your organisation?

	Applicable	Not applicable
*Activity type 1.1 Upgrade of existing research (e-) infrastructures that may be federated through EOSC	0	•
*Activity type 1.2 Development and deployment of EOSC-compatible search engines allowing the researchers to explore rich metadata and semantic descriptions in (future) EOSC-connected registers	•	0
*Activity type 1.3 Deployment of online tools for FAIRification [including to help creating FAIR Data Management Plans]	0	•
*Activity type 1.4 Development and publication of large-scale studies	0	•
*Activity type 1.5 Contribution to operating core functions of a Minimum Viable EOSC ecosystem	0	•

Activity type 1.2

Development and deployment of EOSC-compatible search engines allowing the researchers to explore rich metadata and semantic descriptions in (future) EOSC-connected registers

Estimated number of FTEs contributing to additional activities in 2024 (no spaces, one decimal place, e.g., 7.5)	* FTEs
Estimated financial contributions including above-mentioned FTEs, in euro, to additional activities in 2024 (no spaces, a comma as a separator for decimal places, e.g.: 100000,00 Euro)	* Euro
Please, describe (max 500 words) you activity and highlight its relevance for EOSC and the impact that it shall bear. Please, include: - name of the initiative/project/action - primary purpose - which communities or stakeholders are involved - which communities or stakeholders are addressed (e.g. discipline clusters); - whether mono or multisciplinary - expected outcome and impact; - implementation and/or impact timeline - WEBPAGE address	3000 character(s) maximum 0 out of 3000 characters used.

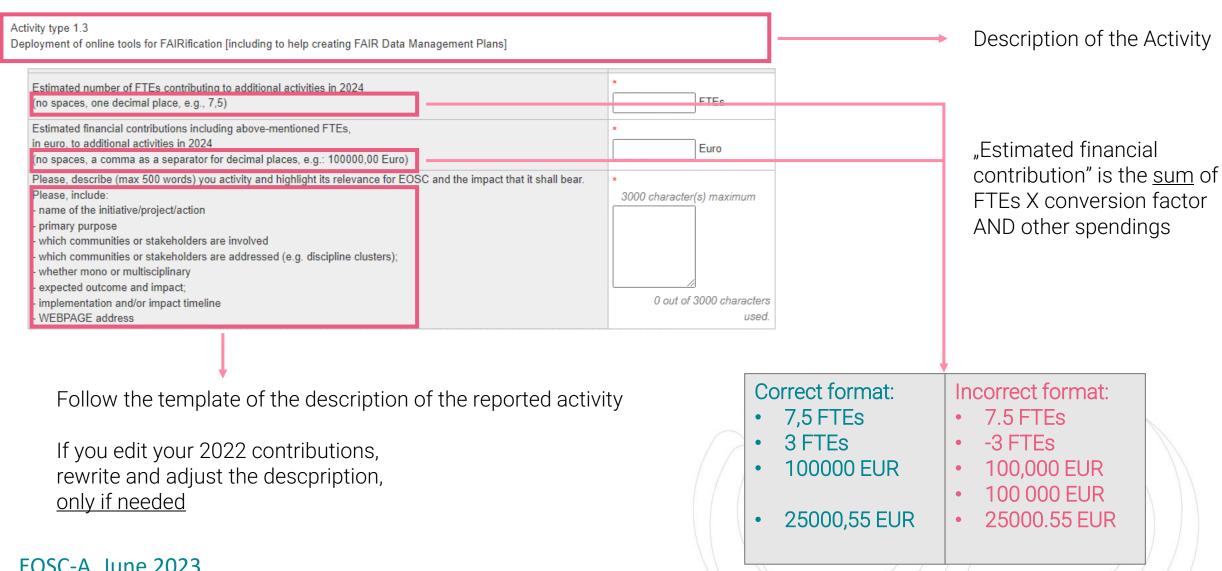
Previous No

Description of the Category

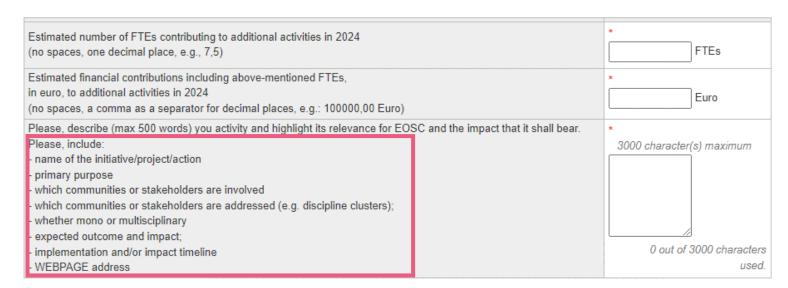
Selection of Activities

Activity box





EOSC-A, June 2023



- Some examples of the description: "scale up the X e-infrastructure capabilities of X data centers and improving their connectivity with the EOSC and other European infrastructures"; 'implementation of interfaces under the project X to integrate computer and data management solutions to ease access and reuse data'; 'upgrade of X data storage infrastructures under the x action with the aim to improve EOSC-related services' (more examples can be found in AAP 2022)
- Description field: a clear link between an indicated activity and EOSC needs to be described ('through EOSC', 'in EOSC- compatibile frameworks', 'discoverable within EOSC')
- A weblink to each type of additional activity can be inserted (not obligatory but can be of help)
- o In case of difficulties with entering a number, description field may be used to insert a comment and a correct value



Section III. ADDITIONAL ACTIVITIES 2024: IMPACT CASE STUDIES



meosc What are impact case studies?

.. Case studies, best practices, success stories...

- Real-life and practical examples, presenting a challenge or a situation that enables to identify and discuss approaches (e.g. pros and cons).
- A method or technique that has been proven to be effective in achieving a particular goal or objective.
- An accepted standard way of doing something within a particular industry or field.
- Presented as "narrative", showcasing something that has happened or is happening in a particular context or environment.
- Detailed information about the context, the challenges faced, the strategies used, the target users/audiences and the outcomes achieved

Exemplifications

- description of implemented technological/organisational solution or practice aimed to improve certain aspects of the EOSC implementation.
- EOSC-related strategies, approaches and/or activities that have been shown through monitoring and evaluation to be effective, efficient, sustainable and/or transferable, and to reliably lead to a desired result.

III. ADDITIONAL ACTIVITIES 2024: CASE STUDIES

CASE STUDY 1	1	Select or
* Additional Activity category		and elabo
•		
* Name of the Activity		
80 character(s) maximum		
0 out of 80 characters used.		
Estimated economic investment, including both FTE costs and other investments	1 .	Valua ab
please, use round numbers, without decimals, and without spaces or other forms of separators among the numbers, e.g.: '125000' for one hundred and twenty-five thousand Euro	0)	Value sh
EURO	4	to pick th
*	-	10 p.o t.
Please, describe (max 1000 words) you activity and highlight its relevance for EOSC and the impact that it shall bear. Please, include:		
- name of the initiative/project/action		
- primary purpose		
- which communities or stakeholders are involved - which communities or stakeholders are addressed (e.g. discipline clusters);		
- whether mono or multisciplinary		
- expected outcome and impact; - implementation and/or impact timeline		Follow th
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5000 character(s) maximum		provided
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0 out of 5000 characters used.		
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* Contact email address		Contactu

Select one or two of the activities reported in the Section II and elaborate more on them OR describe a fully new case

Value should be the same as in the Section II if you decide to pick the activity reported therein

Follow the template of the description of the activity provided in the survey. In the Section III, you will have a chance to provide more details on the activity (e.g., the description can be longer)

Contact details will only be used to learn more about your activity (if needed) and are exclusively for the internal use of the EOSC-A

Contact person may not be you

dditional Activity category
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anie unie Audurijy 80 character (s) maximum
0 out of 80 characters used.
stimated economic investment, including both FTE costs and other investments
ase, use round numbers, without decimals, and without spaces or other forms of separators among the numbers, e.g.: '125000' for one hundred and twenty-five thousand Euro)
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lease, describe (max 1000 words) you activity and highlight its relevance for EOSC and the impact that it shall bear. lease, include:
name of the initiative/project/action
primary purpose
which communities or stakeholders are involved which communities or stakeholders are addressed (e.g. discipline clusters);
whether mono or multisciplinary
expected outcome and in inpact;
mplementation and/or impact timeline
5000 character(s) maximum
0 out of 5000 characters used.
lebsite
ontact person
ontact email address
@ Onlact email address
agree that the case study is made public, including the name and logo of the involved institution/s, except any personal detail:
○ Yes
O No

CASE STUDY 2

Providing second case study is optional, although greatly welcome

Decide if you want your case studies to be public, further disseminated and visible

You can check your responses before submitting the survey

speose 9. Live demonstration

a) REPORT on ADDITIONAL ACTIVITIES 2022 https://ec.europa.eu/eusurvey/home/editcontribution

b) ADDITIONAL ACTIVITIES PLAN 2024 https://ec.europa.eu/eusurvey/runner/AAPsurvey2024

meosc 10. Background information

- o SRIA: https://www.eosc.eu/sria-mar
- o MoU: https://www.eosc.eu/sites/default/files/EOSC_Memorandum_30_July_2021.pdf
- EOSC website: https://www.eosc.eu/monitoring-reporting



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Should you need any further information on AAP 2024 Survey, contact our Monitoring Team at: monitoring@eosc.eu

