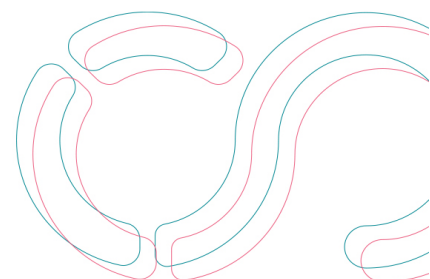


# EOSC MONITORING TOOL

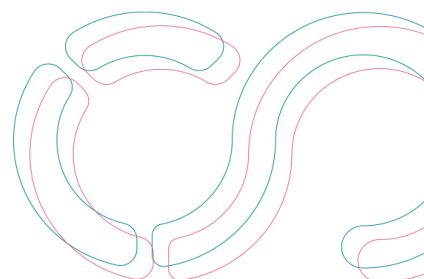
## USER GUIDE

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Reviewer(s)	Ilaria Nardello Monika Góral-Kurbiel	Senior Policy Officer Senior Open Science Specialist

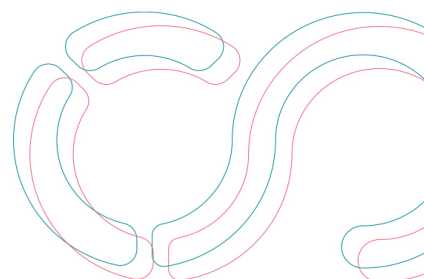


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## 1 Introduction

The EOSC Monitoring Tool is the central online platform where you can submit surveys and access information related to [the EOSC Partnership monitoring](#), specifically:

1. “In-kind contributions by EOSC-A Members towards the Partnership’s objectives (Additional activities plans and reports, AAPs and AARs)”.
2. “the Partnership’s Key Performance Indicators (KPIs)”.

The tool is built on data collected through the monitoring and evaluation of the EOSC Partnership since 2021 and will incorporate updated information for forthcoming assessments. It supports cohesive and effective monitoring and reporting within the EOSC Partnership, as defined by the Memorandum of Understanding (MoU) and aligned with the objectives set out in the Strategic Research & Innovation Agenda (SRIA).

The EOSC Monitoring Tool includes:

- A tool for collaborative survey submissions,
- A repository for viewing and exporting historical submissions,
- A module for the analysis of trends in the data collected over time.

**Supported browsers:** Google Chrome, Apple Safari, Mozilla Firefox, Microsoft Edge, and Opera.

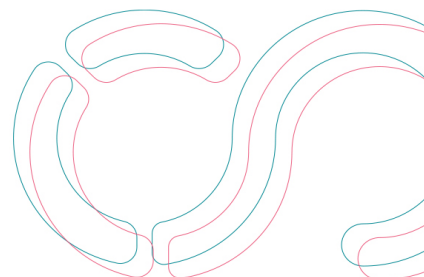
## 2 User Management

The EOSC Monitoring Tool uses a **closed-registration** model that requires account creation, activation, and secure sign-in. As a result, the Tool can only be accessed by registered users.

User accounts can be:

- [Created by EOSC Monitoring Tool administrators](#),
- [Requested by EOSC-A members via self-registration](#).

A single organisation can request or create as many user accounts as needed.



## 2.1 User Accounts

### 2.1.1 Account creation by the Administrators of the EOSC Monitoring Tool

User accounts may be created directly by EOSC Monitoring Tool administrators upon a user's request.

These accounts are pre-approved and ready for use after activation.

#### 2.1.1.1 Request for a new user account

To request account creation, email the EOSC-A Monitoring Team at [monitoring@eosc.eu](mailto:monitoring@eosc.eu) with:

- First name,
- Last name,
- Organisation name (in English),
- Email address,
- Account type\*: Submitter / Viewer / Editor,
- EOSC Association role: Delegate / Deputy delegate / Submitter / Invoicing contact / Communication and engagement / Board of Directors / Other contact.

Optional – This information can also be provided later during activation:

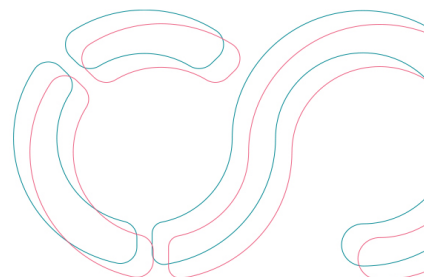
- Job position,
- Phone.

#### \* Account Types:

**Viewer:** This role provides read-only access. Users can view their organisation's historical submissions, current drafts, and submission trends across different survey waves. They are not permitted to modify or submit forms.

**Editor:** Editors can modify survey drafts created by users in their organisation. They are involved in the preparation of submissions but cannot finalise and send the data.

**Submitter:** Submitters have the highest level of permissions within a member organisation. They can create, edit, and officially submit forms. This role is generally assigned to the person responsible for coordinating the organisation's response to EOSC surveys.



### 2.1.1.2 Account activation

Once your account has been created by the EOSC Monitoring Team, you will receive an email titled **"Please activate your EOSC Monitoring Tool account"**.

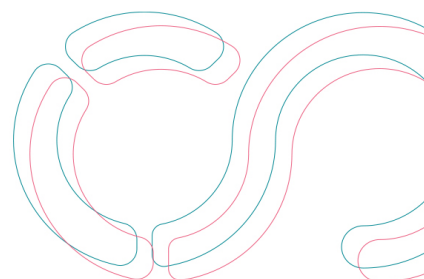
This email explains that you can get started in two ways:

- **Option 1** – Sign-in via the supported secure authentication providers (eduGAIN, B2ACCESS, GitHub, Google, ORCID),
- **Option 2** – Activate your account by setting your password.

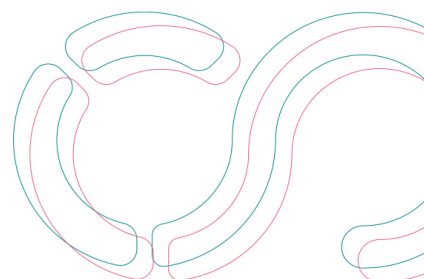
#### 2.1.1.2.1 Option 1 – Sign-in via the supported secure authentication providers

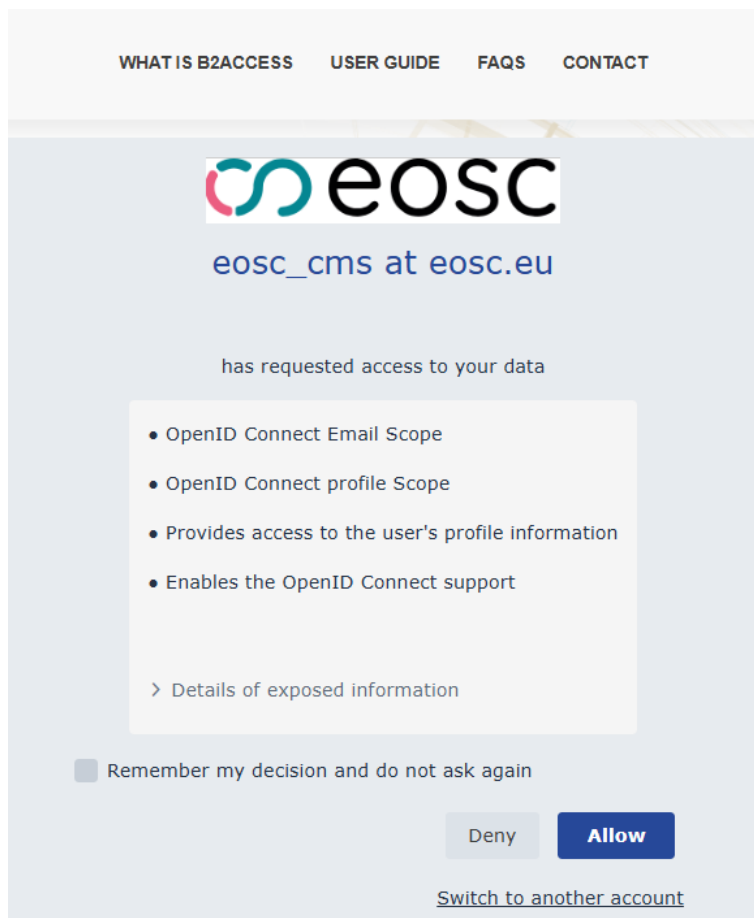
Steps:

1. Open the email titled **"Please activate your EOSC Monitoring Tool account"**.
2. In the section **"Option 1 – OpenID Connect Select"**, follow the link **"Sign in with OpenID Connect"**.
3. You will be redirected to the **EOSC Monitoring Tool – Welcome** page on the EOSC website. Under **"Option 1 – Sign in using an external account"**, select **"Sign in with OpenID Connect"**.
4. Choose one of the available identity providers and sign in, we recommend using **eduGAIN, B2ACCESS, GitHub, Google, or ORCID**.  
These providers have been tested and are recommended for the most seamless sign-in experience.
5. After successful sign-in using the selected identity provider, you will be redirected to the **B2ACCESS consent page**.  
Please note that your credentials (password, private key, etc.) will not be exposed at any point.

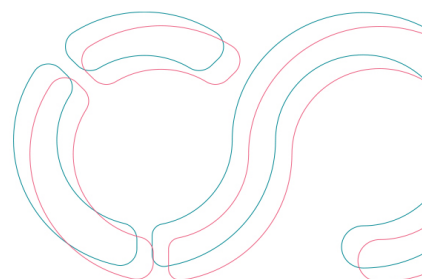


You will also see the option **“Remember my decision and do not ask again.”** Select this checkbox if you want B2ACCESS to remember your choice for future sign-ins. If enabled, you will not be asked to grant these permissions again when accessing the EOSC Monitoring Tool. Choosing this option is entirely optional. If you agree with the requested access, proceed by selecting **“Allow”** to continue.





6. Complete your profile, accept the Privacy Policy, select **“Update Account”**, then you are redirected to the Welcome page.






[Home](#) / [EOSC Monitoring Tool](#) / [Complete Your Profile](#)

## Complete Your Profile

### Test User

Test Organisation

	Account Details	>
	Change Password	>
	Delete Account	>

- [EOSC Monitoring Tool Home](#)
- [My Surveys](#)
- [User Guide](#)
- [Logout](#)

### Account Details

**Username \***

**First Name \***

**Last Name \***

**Email Address \***

**Organisation \***

**Job position \***

**Phone \***

**EOSC Association role**

**Suggest your role in the Platform \***

**Privacy Policy \***

☐ consent to the processing of my personal data in accordance with the [Privacy Policy](#) and confirm that I have read and understood its contents.

**Update Account**

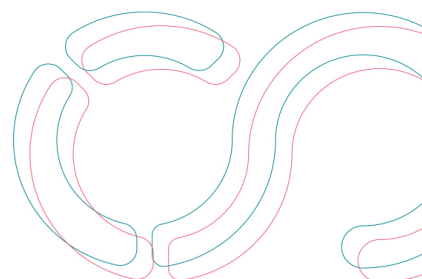
## 2.1.1.2.2 Option 2 – Set your password to activate your account

### Steps:

1. Open the email titled **"Please activate your EOSC Monitoring Tool account"**.
2. In the section **"Option 2 – Set your password to activate your account"**, follow the link **"Sign in using your EOSC.eu account"** to set your password.
3. You will be redirected to the EOSC Monitoring Tool – **Password Reset** page, where you will be prompted to enter your email address or username. Please enter the email address or username shown in the email titled **"Please activate your EOSC Monitoring Tool account"** and select **"Reset password"**.

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[Home](#) / [EOSC Monitoring Tool](#) / Password Reset

## Password Reset

To reset your password, please enter your email address or username below.

Reset password

Don't have an account? [Register](#)

4. You will receive an email titled **"EOSC Monitoring Tool password reset"**. Follow the link **"Reset your password"** in this email to set your password.
5. You will be redirected to the **EOSC Monitoring Tool – Password Reset** page where you will be prompted to set a new password.

[Home](#) / [EOSC Monitoring Tool](#) / Password Reset

## Password Reset

New Password \*

Confirm Password \*

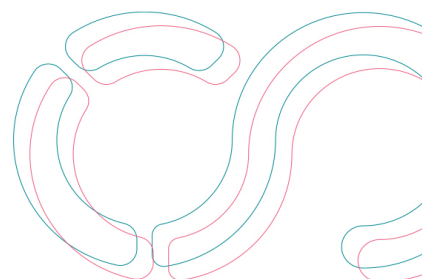
Change password

### Password requirements are as follows:

- at least one lowercase letter
- at least one uppercase letter
- at least one number
- minimum 8 characters

After providing a new password and confirming it, please select **"Change password"**.

6. You will be redirected to the EOSC Monitoring Tool – Welcome page where you can sign in using your newly created password and email address or username – **Option 2**.





# Monitoring Tool

## Welcome!

The EOSC Monitoring Tool has been developed by the EOSC Association, with the support of EOSC Focus. It is an online survey and analysis platform aimed at supporting the monitoring efforts of the EOSC Partnership and alleviating the burden for EOSC-A members in complying with the monitoring processes.

The platform has been designed to facilitate the monitoring and evaluation of the Partnership's Additional Activities and Key Performance Indicators, while ensuring a secure, EU-GDPR-compliant environment.

Users of the EOSC Monitoring Tool have access to open surveys, with the ability to resume drafts of partially completed surveys and to review the data contained in their submitted surveys.

If you require an account, have questions about the tool, or encounter any problems, please reach out to us at [monitoring@eosc.eu](mailto:monitoring@eosc.eu).

### Option 1 — Sign in using an external account

Choose from our supported authentication providers for quick and secure registration:

eduGAIN • ORCID • EUDAT B2ACCESS • Google • GitHub

[Sign in with OpenID Connect](#)

Your password has been set. Please login below. ✕

### Option 2 — Sign in with your EOSC Monitoring Tool account

Username or E-mail \*

Password \*

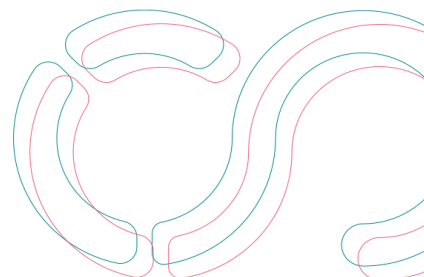
☐ Keep me signed in

Login

Don't have an account? [Register now](#)

[Forgot your password?](#)

7. You will receive another email titled **"EOSC Monitoring Tool password reset"** confirming that your password has been changed. You can select **"Go to your Account"** in this message to visit the EOSC Monitoring Tool Welcome page, where you can also sign in using **Option 2**.
8. Log in with your email/username and password.
9. Complete your profile and accept the **Privacy Policy**, then select **"Update Account"** to finalise the process.
10. You will be redirected to the **EOSC Monitoring Tool – Welcome** page.



## 2.2 Account creation by the user

EOSC-A members may create user accounts via the **self-registration** option on the [Registration page](#) of the EOSC Monitoring Tool.

There are two options:

- **Option 1** — Register using an external account choosing from our supported authentication providers (eduGAIN, B2ACCESS, GitHub, Google, ORCID),
- **Option 2** — Create a new EOSC Monitoring Tool account by filling in the form and setting a password.

### 2.2.1 Option 1 — Register using an external account

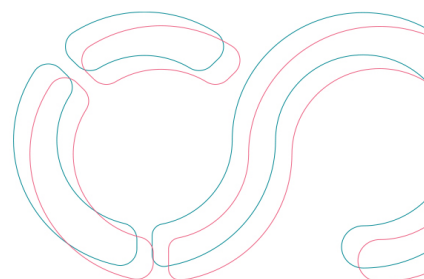
Choose from our supported authentication providers for quick and secure registration.

**Note:**

- Your institutional email must match the domain associated with your organisation's EOSC-A records. If your email address does not match your organisation's domain, please use option "**2.1 Account creation by the EOSC Monitoring Tool administrators**" to request an account.
- If you require urgent access or have difficulties registering, please contact: [monitoring@eosc.eu](mailto:monitoring@eosc.eu).

**Steps:**

1. Go directly to the [Registration page](#) or go to the [EOSC Monitoring Tool Welcome page](#) and click "**Register now**".
2. Select "**Sign in with OpenID Connect**".



## Option 1 — Register using an external account

Choose from our supported authentication providers for quick and secure registration:

eduGAIN • ORCID • EUDAT B2ACCESS • Google • GitHub

[Sign in with OpenID Connect](#)

## Option 2 — Create a new EOSC Monitoring Tool account

Fill in the form and set a password.

First Name \*

Last Name \*

Phone \*

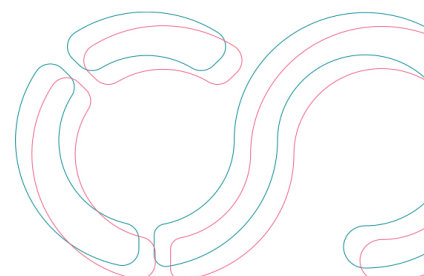
- Choose one of the available identity providers and sign in, we recommend using eduGAIN, B2ACCESS, GitHub, Google or ORCID.

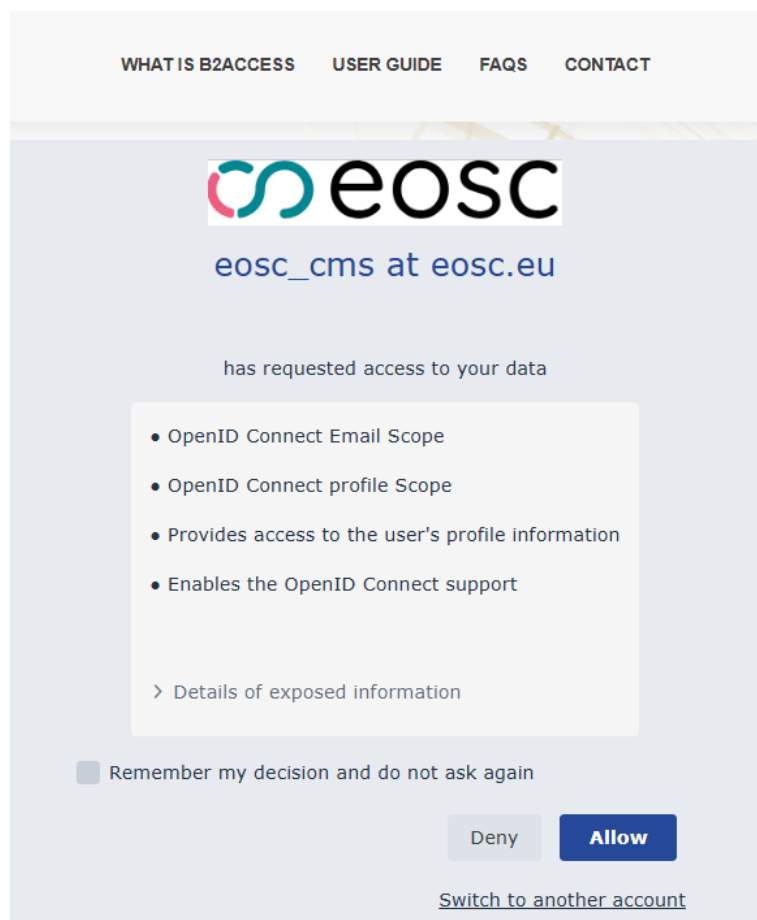
These providers have been tested and are recommended for the most seamless sign-in experience.

- After successful sign-in using the selected identity provider, you will be redirected to the **B2ACCESS consent page**.

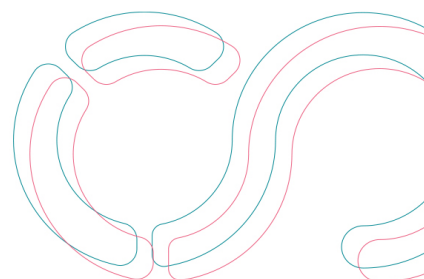
Please note that your credentials (password, private key, etc.) will not be exposed at any point.

You will also see the option **“Remember my decision and do not ask again.”** Select this checkbox if you want B2ACCESS to remember your choice for future sign-ins. If enabled, you will not be asked to grant these permissions again when accessing the EOSC Monitoring Tool. Choosing this option is entirely optional. If you agree with the requested access, proceed by selecting **“Allow”** to continue.








- You will be redirected to the **EOSC Monitoring Tool – Complete Your Profile** page where you should provide all requested information and accept the **Privacy Policy**, then select **“Update Account”** to finalise the process.



## Complete Your Profile

### Test User

Test Organisation

	Account Details	>
	Change Password	>
	Delete Account	>

- [EOSC Monitoring Tool Home](#)
- [My Surveys](#)
- [User Guide](#)
- [Logout](#)

#### Account Details

**Username \***

**First Name \***

**Last Name \***

**Email Address \***

**Organisation \***

**Job position \***

**Phone \***

**EOSC Association role**

**Suggest your role in the Platform \***

**Privacy Policy \***

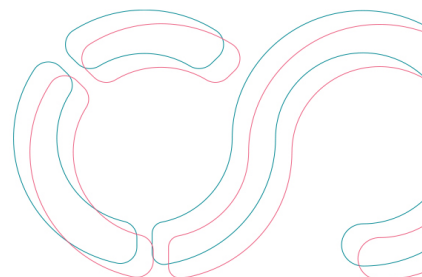
☐ consent to the processing of my personal data in accordance with the [Privacy Policy](#) and confirm that I have read and understood its contents.

**Update Account**

6. You will be notified that your request concerning account creation is awaiting verification. If you experience delays, please, reach out to us at [monitoring@eosc.eu](mailto:monitoring@eosc.eu).
7. Once your registration is positively approved by EOSC-A administrators you will receive an email entitled "Your EOSC Monitoring Tool account is now active". Enter the [EOSC Monitoring Tool Welcome page](#) to sign in using **Option 1**.

### EOSC Association AISBL

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# | Monitoring Tool

## Welcome!

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The platform has been designed to facilitate the monitoring and evaluation of the Partnership's Additional Activities and Key Performance Indicators, while ensuring a secure, EU-GDPR-compliant environment.

Users of the EOSC Monitoring Tool have access to open surveys, with the ability to resume drafts of partially completed surveys and to review the data contained in their submitted surveys.

If you require an account, have questions about the tool, or encounter any problems, please reach out to us at [monitoring@eosc.eu](mailto:monitoring@eosc.eu).

### Option 1 — Sign in using an external account

Choose from our supported authentication providers for quick and secure registration:

eduGAIN • ORCID • EUDAT B2ACCESS • Google • GitHub



[Sign in with OpenID Connect](#)

### Option 2 — Sign in with your EOSC Monitoring Tool account

Username or E-mail \*

Password \*

☐ Keep me signed in

Login

Don't have an account? [Register now](#)

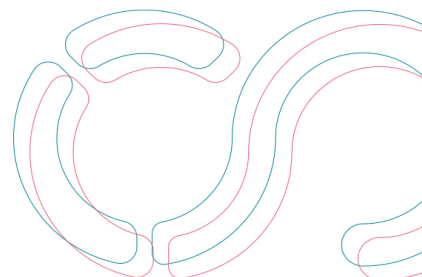
[Forgot your password?](#)

## 2.2.2 Option 2 — Create a new EOSC Monitoring Tool account using email and password

Create a new EOSC Monitoring Tool account by filling in the registration form and setting a password.

### Steps:

1. Go directly to the [Registration page](#), or go to the [EOSC Monitoring Tool Welcome page](#) and click “**Register now**”.
2. Fill in the registration form with the following required fields:



- First name,
- Last name,
- Phone,
- Institutional email address (must be linked to the organisation you represent in EOSC),
- Job position,
- Select Organisation name from the list of approved organisations (in English). You can search by typing the organisation name in the field,

**Job Position \*** 

**Organisation \***

Albanian Academic Network

Barcelona Supercomputing Center - Centro Nacional de Supercomputación

Basque Center For Applied Mathematics

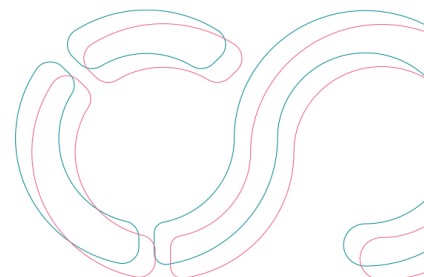
Biobanking and BioMolecular resources Research Infrastructure - European Research Infrastructure Consortium

Illes Balears Health Research Institute foundation

**Confirm Password \***



- Select EOSC Association role (e.g., Delegate, Deputy Delegate, Submitter),
- Select your desired Account Type\*: Viewer / Editor / Submitter. See [2.4.2 User roles and capabilities](#).

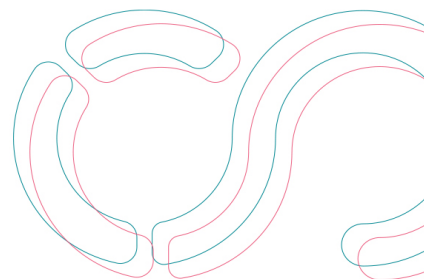


- Password:

**Password requirements:**

- Minimum 8 characters
- At least one lowercase letter
- At least one uppercase letter
- At least one number

3. Accept the Privacy Policy.
4. Select the **"Register"** button to send your registration request.



[Home](#) / [Register](#)

## Register

### Option 1 — Register using an external account

Choose from our supported authentication providers for quick and secure registration:

eduGAIN • ORCID • EUDAT B2ACCESS • Google • GitHub

[Sign in with OpenID Connect](#)

### Option 2 — Create a new EOSC Monitoring Tool account

Fill in the form and set a password.

First Name \*

Last Name \*

Phone \*

E-mail Address \* ?

Job Position \* ?

Organisation \*

EOSC Association role

Suggest your role in the EOSC Monitoring tool \* ?

Password \* ?

Confirm Password \*

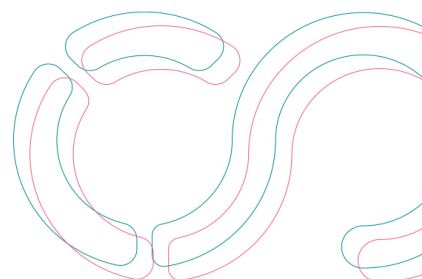
☐ I consent to the processing of my personal data in accordance with the [Privacy Policy](#) and confirm that I have read and understood its contents. \*

Register

Already have an account? [Sign in](#)

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+32 2 537 73 18 | [info@eosc.eu](mailto:info@eosc.eu) | [www.eosc.eu](http://www.eosc.eu)  
Reg. number: 0755 723 931 | VAT number: BE0755 723 931



Once submitted, your request will be reviewed by the EOSC-A Monitoring Team. This may take a few working days. A confirmation email will be sent once the account is approved and activated (or declined).

5. Once your registration is positively approved by EOSC-A administrators you will receive an email entitled "Your EOSC Monitoring Tool account is now active". Enter the [EOSC Monitoring Tool Welcome page](#) to sign in using **Option 2**.

[Home](#) / EOSC Monitoring Tool

# | Monitoring Tool

## Welcome!

The EOSC Monitoring Tool has been developed by the EOSC Association, with the support of EOSC Focus. It is an online survey and analysis platform aimed at supporting the monitoring efforts of the EOSC Partnership and alleviating the burden for EOSC-A members in complying with the monitoring processes.

The platform has been designed to facilitate the monitoring and evaluation of the Partnership's Additional Activities and Key Performance Indicators, while ensuring a secure, EU-GDPR-compliant environment.

Users of the EOSC Monitoring Tool have access to open surveys, with the ability to resume drafts of partially completed surveys and to review the data contained in their submitted surveys.

If you require an account, have questions about the tool, or encounter any problems, please reach out to us at [monitoring@eosc.eu](mailto:monitoring@eosc.eu).

### Option 1 — Sign in using an external account

Choose from our supported authentication providers for quick and secure registration:

eduGAIN • ORCID • EUDAT B2ACCESS • Google • GitHub

[Sign in with OpenID Connect](#)

### Option 2 — Sign in with your EOSC Monitoring Tool account

Username or E-mail \*

Password \*

☐ Keep me signed in

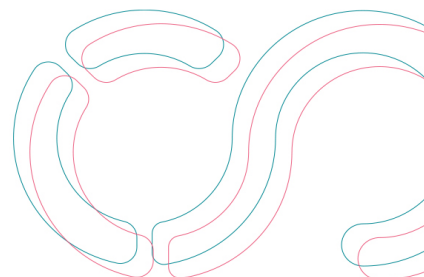
Login

Don't have an account? [Register now](#)

[Forgot your password?](#)

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 Reg. number: 0755 723 931 | VAT number: BE0755 723 931



## 2.3 Ways to sign in

After you have successfully registered your account ([2.1 Account creation by the EOSC Monitoring Tool administrators](#) or [2.2 Account creation by the user](#)), the EOSC Monitoring Tool offers two ways to sign in:

- **Option 1** – Sign in using an external account choosing from our supported authentication providers (eduGAIN, B2ACCESS, GitHub, Google, ORCID),
- **Option 2** – Sign in with your EOSC Monitoring Tool account.
  - This option is available only for users who registered following Option 2.

**Note:** Your sign-in credentials and method must match the details used during registration or account setup by EOSC-A administrators.

### 2.3.1 Option 1 – Sign in using an external account

Choose one of the available identity providers and sign in, we recommend using:

- eduGAIN,
- B2ACCESS,
- GitHub,
- Google,
- ORCID.

These providers have been tested and are recommended for the most seamless sign-in experience.

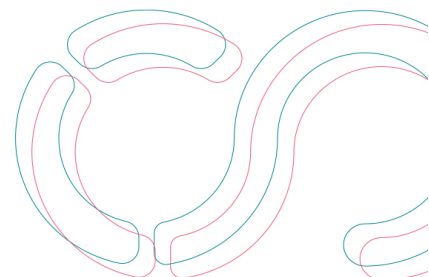
**Note:**

- Your third-party email must match your EOSC Monitoring Tool account email.

You may change the authentication provider at any time, but this will require you to accept the privacy policy again within the **“Complete Your Profile”** section.

**Steps:**

1. Go to the [EOSC Monitoring Tool Welcome page](#).
2. Select **“Sign in with OpenID Connect”** – Option 1.





# Monitoring Tool

## Welcome!

The EOSC Monitoring Tool has been developed by the EOSC Association, with the support of EOSC Focus. It is an online survey and analysis platform aimed at supporting the monitoring efforts of the EOSC Partnership and alleviating the burden for EOSC-A members in complying with the monitoring processes.

The platform has been designed to facilitate the monitoring and evaluation of the Partnership's Additional Activities and Key Performance Indicators, while ensuring a secure, EU-GDPR-compliant environment.

Users of the EOSC Monitoring Tool have access to open surveys, with the ability to resume drafts of partially completed surveys and to review the data contained in their submitted surveys.

If you require an account, have questions about the tool, or encounter any problems, please reach out to us at [monitoring@eosc.eu](mailto:monitoring@eosc.eu).

### Option 1 — Sign in using an external account

Choose from our supported authentication providers for quick and secure registration:

eduGAIN • ORCID • EUDAT B2ACCESS • Google • GitHub

[Sign in with OpenID Connect](#)

### Option 2 — Sign in with your EOSC Monitoring Tool account

Username or E-mail \*

Password \*

☐ Keep me signed in

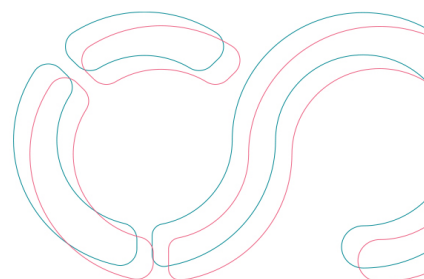
Login

Don't have an account? [Register now](#)

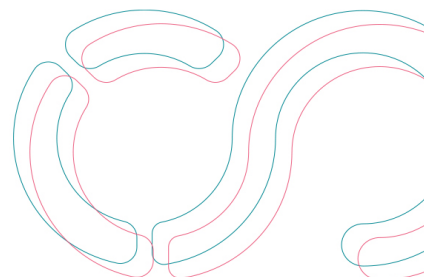
[Forgot your password?](#)

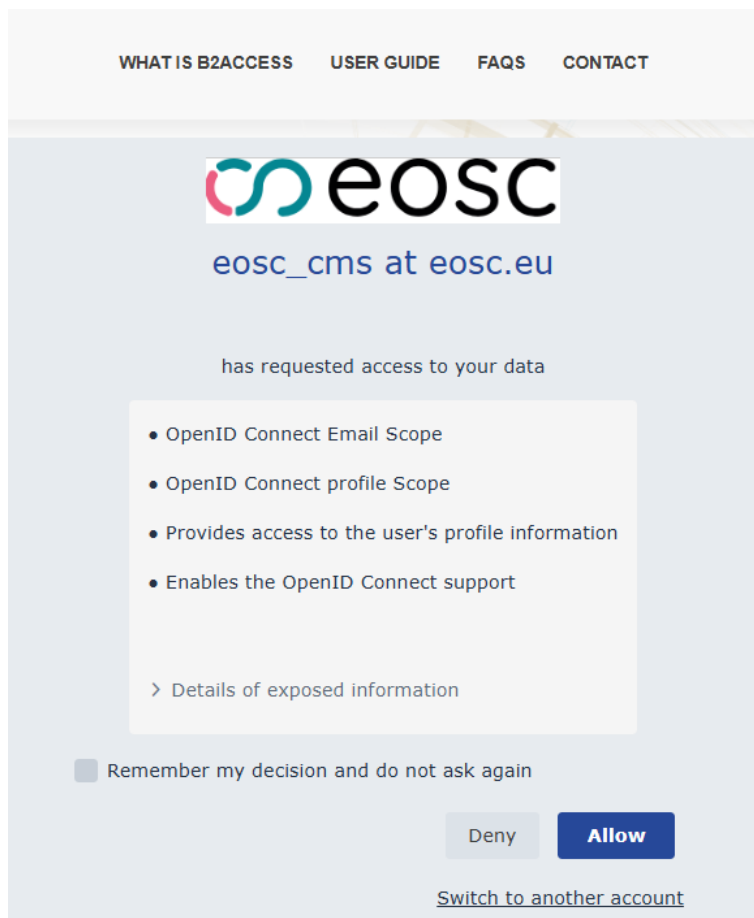
- Select your provider on the **B2ACCESS sign-in** page (e.g., "Sign in with ORCID").

Please note that when you sign in for the second time or later, the previously selected sign-in option in B2ACCESS will be automatically pre-selected.



4. Enter your third-party credentials.
5. Select **“Allow”** to grant permissions.
6. You will be redirected to the EOSC Monitoring Tool Welcome page on the EOSC website as a signed-in user.



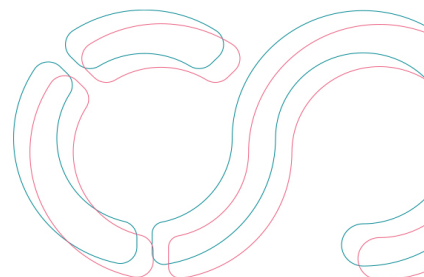


### 2.3.2 Option 2 – Sign in with your EOSC Monitoring Tool account

This sign-in option is available only if, during registration, you selected **Option 2 – Set your password to activate your account**. If you registered using Option 1 – Sign in with OpenID Connect, please follow the instructions in [Section 2.3.1](#) instead.

#### Steps:

1. Go to the [EOSC Monitoring Tool Welcome page](#).
2. Enter your **email address** and **password** in the Option 2 section.



[Home](#) / EOSC Monitoring Tool

# | Monitoring Tool

## Welcome!

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### Option 1 — Sign in using an external account

Choose from our supported authentication providers for quick and secure registration:

[eduGAIN](#) • [ORCID](#) • [EUDAT B2ACCESS](#) • [Google](#) • [GitHub](#)

[Sign in with OpenID Connect](#)

### Option 2 — Sign in with your EOSC Monitoring Tool account

Username or E-mail \*

Password \*

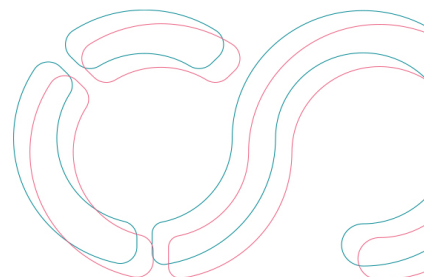
☐ Keep me signed in

Login

Don't have an account? [Register now](#)

[Forgot your password?](#)

3. Select “**Login**” to access the platform.
4. You will be redirected to the EOSC Monitoring Tool Welcome page on the EOSC website as a signed-in user.

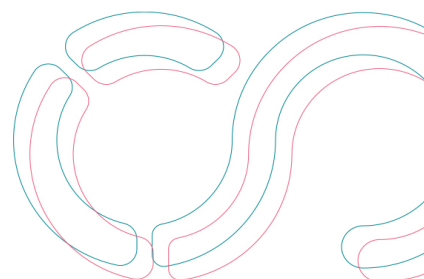


## 2.4 User account management

After you sign in, you are redirected to the EOSC Monitoring Tool – Welcome page. This page explains the purpose of the Tool and provides quick access to the main features via the top navigation bar (My Surveys, My Account, User Guide, Logout).

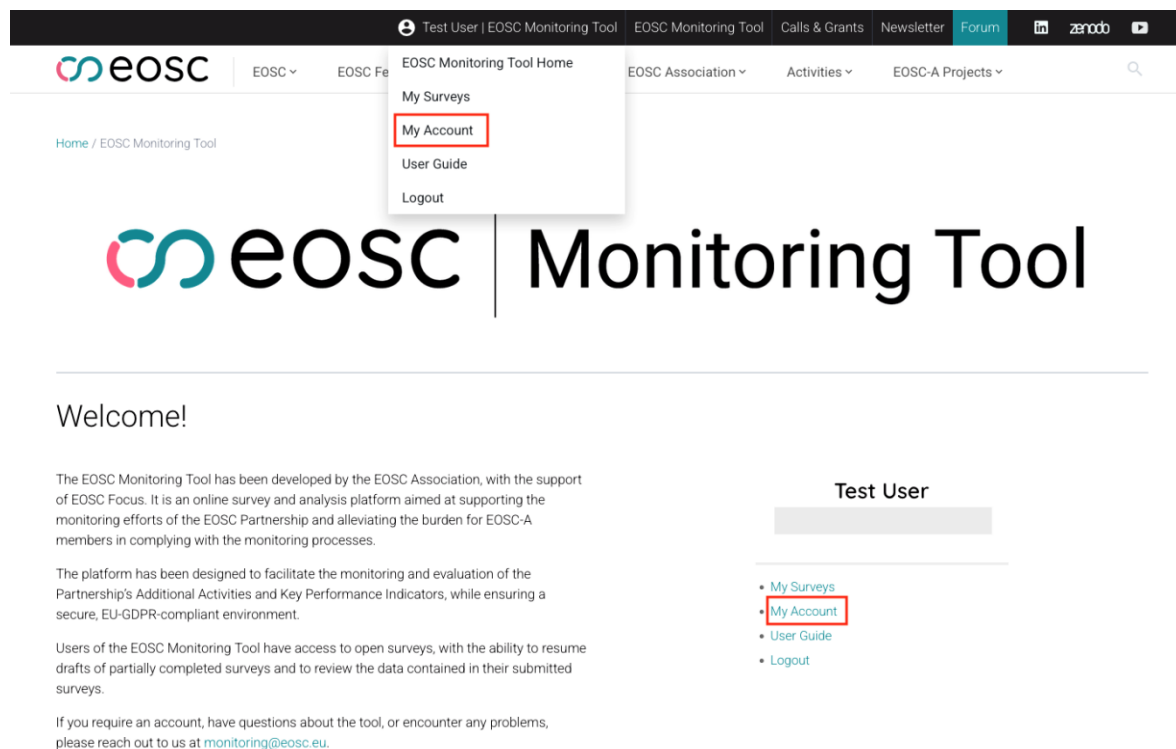
From here, you can:

- **My Surveys** – access surveys assigned to your organisation, divided into three categories: AAP, AAR, and KPI; review calls for participation, resume drafts, and view submitted surveys from previous waves; see other registered members from your organisation and their roles.
- **My Account** – view and update your personal account; review your organisation details and report discrepancies.
- **User Guide** – open detailed, step-by-step instructions on how to use the EOSC Monitoring Tool.
- **Logout** – securely end your session in the EOSC Monitoring Tool.



## 2.4.1 My Account — Editing existing account details

You can update your personal details and credentials at any time from **My Account**. From there you can review and update your account information and change your password.



### 2.4.1.1 User's information

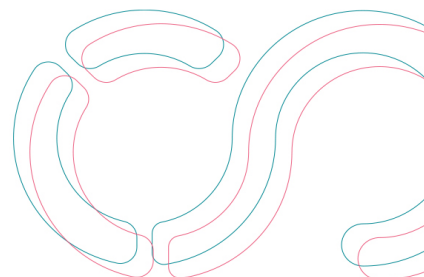
This section shows how to edit the personal details linked to your account.

#### Steps:

1. Navigate to **My Account > Account Details**.

Editable fields are as follows:

- First name,
- Last name,
- Email address,
- Job position,

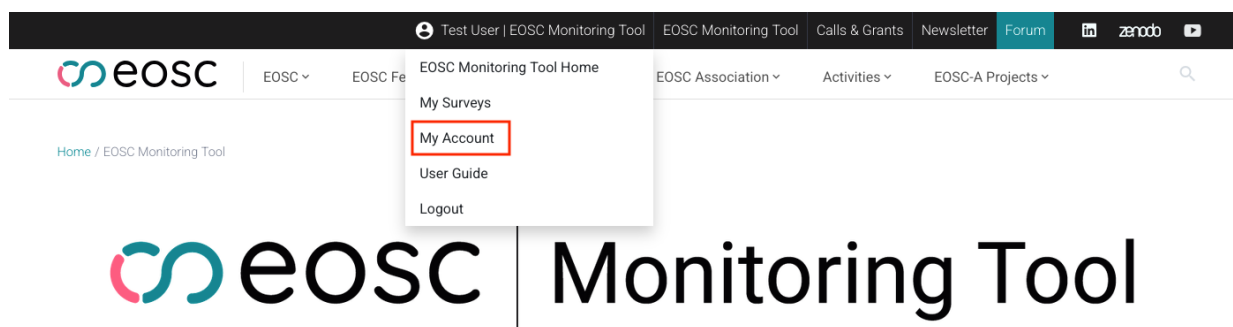


- Phone,
- EOSC Association role.

The following field is read-only:

- Suggest your role in the Platform.

**Note:** You cannot edit your role in the EOSC Monitoring Tool. To request a change, please contact us at [monitoring@eosc.eu](mailto:monitoring@eosc.eu).



Welcome!

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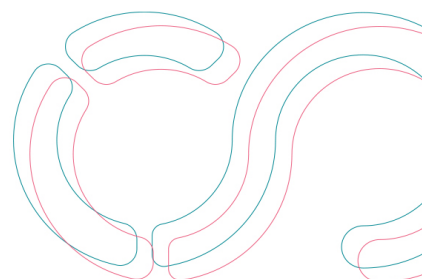
If you require an account, have questions about the tool, or encounter any problems, please reach out to us at [monitoring@eosc.eu](mailto:monitoring@eosc.eu).

Test User

- [My Surveys](#)
- [My Account](#)
- [User Guide](#)
- [Logout](#)

## EOSC Association AISBL

Rue du Luxembourg 3, BE-1000 Brussels, Belgium  
 +32 2 537 73 18 | [info@eosc.eu](mailto:info@eosc.eu) | [www.eosc.eu](http://www.eosc.eu)  
 Reg. number: 0755 723 931 | VAT number: BE0755 723 931






[Home](#) / [EOSC Monitoring Tool](#) / [My Account](#)

## My Account

### Test User

Test Organisation

	Account Details	>
	Change Password	>
	Delete Account	>

- [EOSC Monitoring Tool Home](#)
- [My Surveys](#)
- [User Guide](#)
- [Logout](#)

#### Account Details

**Username \***

username

**First Name \***

Test

**Last Name \***

User

**Email Address \***

email@address.com

**Organisation \***

Test Organisation

**Job position \***

Policy officer

**Phone \***

1234567

**EOSC Association role**

-- Choose Role --

**Suggest your role in the Platform \***

Viewer(s)

**Privacy Policy \***

☒ consent to the processing of my personal data in accordance with the [Privacy Policy](#) and confirm that I have read and understood its contents.

Update Account

2. To save changes, re-accept the Privacy Policy and select **"Update Account"**.

### 2.4.1.2 Change Password

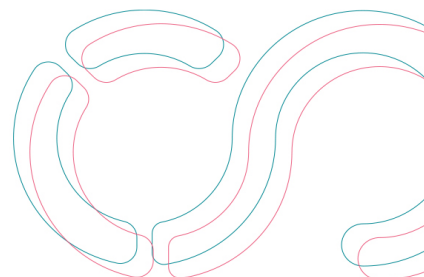
You can change your password at any time from your account settings.

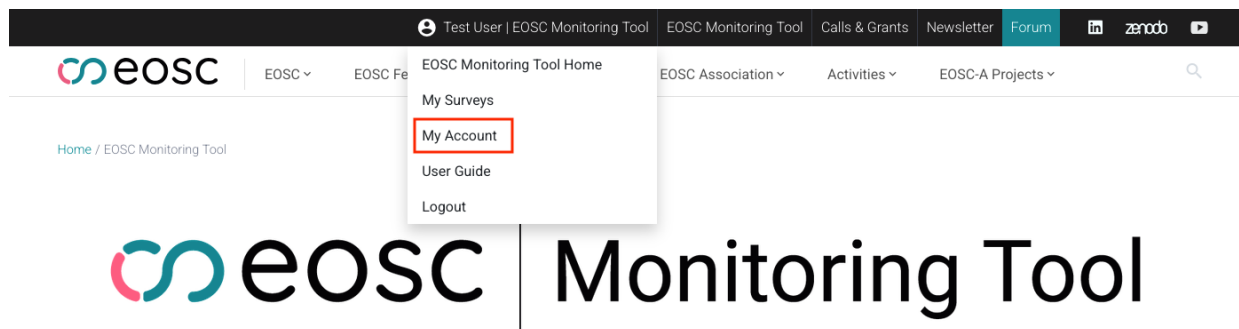
#### Steps:

1. Navigate to **My Account > Change Password**.

#### EOSC Association AISBL

Rue du Luxembourg 3, BE-1000 Brussels, Belgium  
 +32 2 537 73 18 | [info@eosc.eu](mailto:info@eosc.eu) | [www.eosc.eu](http://www.eosc.eu)  
 Reg. number: 0755 723 931 | VAT number: BE0755 723 931





## Welcome!

The EOOSC Monitoring Tool has been developed by the EOOSC Association, with the support of EOOSC Focus. It is an online survey and analysis platform aimed at supporting the monitoring efforts of the EOOSC Partnership and alleviating the burden for EOOSC-A members in complying with the monitoring processes.

The platform has been designed to facilitate the monitoring and evaluation of the Partnership's Additional Activities and Key Performance Indicators, while ensuring a secure, EU-GDPR-compliant environment.

Users of the EOOSC Monitoring Tool have access to open surveys, with the ability to resume drafts of partially completed surveys and to review the data contained in their submitted surveys.

If you require an account, have questions about the tool, or encounter any problems, please reach out to us at [monitoring@eosc.eu](mailto:monitoring@eosc.eu).

### Test User

- [My Surveys](#)
- [My Account](#) (highlighted with a red box)
- [User Guide](#)
- [Logout](#)

## 2. In the left-hand menu, go to **Account > Change Password**.

[Home](#) / [EOOSC Monitoring Tool](#) / [My Account](#)

## My Account

### Test User

Test Organisation

- [Account Details](#)
- [Change Password](#) (highlighted with a red box)
- [Delete Account](#)

- [EOOSC Monitoring Tool Home](#)
- [My Surveys](#)
- [User Guide](#)
- [Logout](#)

### \* Change Password

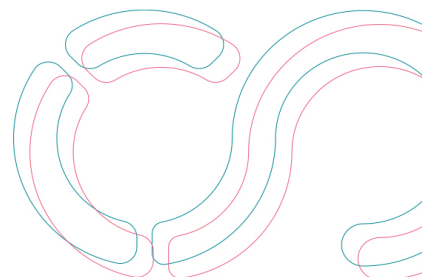
Current Password \*

Password \*

Confirm Password \*

**Update Password**

## 3. Enter your new password and confirm it by typing it again. Select **“Update Password”** to save the changes.

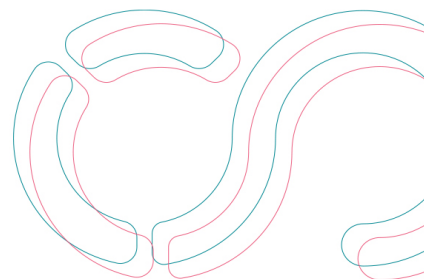


### 2.4.1.3 Reset password

If you are unable to access your account, follow the steps below:

**Steps:**

1. Contact the EOSC Association Monitoring Team at [monitoring@eosc.eu](mailto:monitoring@eosc.eu).
2. The EOSC-A Monitoring Team will initiate a password reset.
3. You will receive an email titled **"EOSC Monitoring Tool password reset"** with a link to a secure page where you can set a new password.
4. After setting your new password, sign in at <https://eosc.eu/eosc-monitoring-tool/> using **Option 2**.



# | Monitoring Tool

## Welcome!

The EOSC Monitoring Tool has been developed by the EOSC Association, with the support of EOSC Focus. It is an online survey and analysis platform aimed at supporting the monitoring efforts of the EOSC Partnership and alleviating the burden for EOSC-A members in complying with the monitoring processes.

The platform has been designed to facilitate the monitoring and evaluation of the Partnership's Additional Activities and Key Performance Indicators, while ensuring a secure, EU-GDPR-compliant environment.

Users of the EOSC Monitoring Tool have access to open surveys, with the ability to resume drafts of partially completed surveys and to review the data contained in their submitted surveys.

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### Option 1 — Sign in using an external account

Choose from our supported authentication providers for quick and secure registration:

[eduGAIN](#) • [ORCID](#) • [EUDAT B2ACCESS](#) • [Google](#) • [GitHub](#)

[Sign in with OpenID Connect](#)

Your password has been set. Please login below. 

### Option 2 — Sign in with your EOSC Monitoring Tool account

Username or E-mail \*

Password \*

☐ Keep me signed in

Login

Don't have an account? [Register now](#)

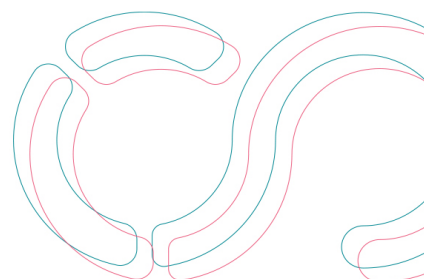
[Forgot your password?](#)

## 2.4.1.4 Delete account

If you no longer wish to use the EOSC Monitoring Tool, you can request the deletion of your user account.

When you submit a deletion request:

- Your request is sent to the EOSC-A Monitoring Team for processing,
- Your account remains active until the request has been reviewed and completed,
- You will receive a confirmation email once your account has been deleted.



**Important:** After your account is deleted, you will no longer be able to sign in to the EOSC Monitoring Tool with this account. Survey submissions that you contributed to may be retained for monitoring and reporting purposes in line with the Privacy Policy, but your personal details will no longer be associated with them.

## Steps:

1. Go to **My Account > Delete account**.
2. Review the information on the **Request account deletion** page.
3. In the confirmation field, type the following text exactly as shown: delete my account.
4. Select **Submit deletion request** to send your request to the administrators.




You will receive an email notification once your request has been processed and your account has been deleted.

[Home](#) / [EOSC Monitoring Tool](#) / [My Account](#)

## My Account

### Test User

Test Organisation

	Account Details	>
	Change Password	>
	Delete Account	>

- [EOSC Monitoring Tool Home](#)
- [My Surveys](#)
- [User Guide](#)
- [Logout](#)

### Delete account

#### Request account deletion

This action will submit a deletion request to our administrators. Your account will remain active until the request is processed. You will receive a confirmation email once your account has been deleted.

Type the following to confirm your request: delete my account

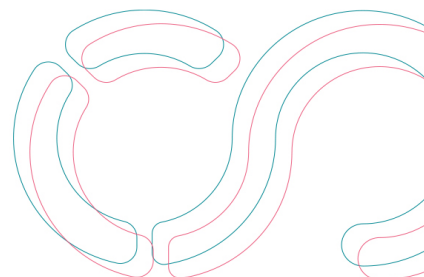
**Submit deletion request**

## 2.4.2 Organisation details

At the bottom of the [My Account](#) page, you will find the **Organisation Details** form. Use it to:

- Report errors in the information displayed about your organisation,
- Submit updates or changes related to the organisation's name, structure, contact details, or other relevant metadata.

If you notice any discrepancies, or if your organisation has undergone recent changes, submit this form to notify the EOSC-A Monitoring Team. Your request will be reviewed and verified before any changes are applied to the system records.



For urgent matters, contact the Monitoring Team at [monitoring@eosc.eu](mailto:monitoring@eosc.eu).

**Note:** Reporting discrepancies is only available to users with the **Submitter** role. Viewers and Editors cannot send this request.

### Organisation details

Organisation

Organisation EN

Membership type

Organisation type

Organisation address

Organisation Country

Organisation City

If you notice any discrepancies in your organisation's information, please let us know, and we will ensure our database is promptly updated.

Name

First

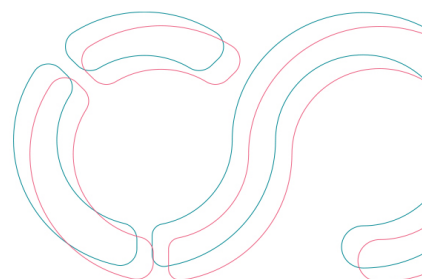
Last

Organisation

Email

Message

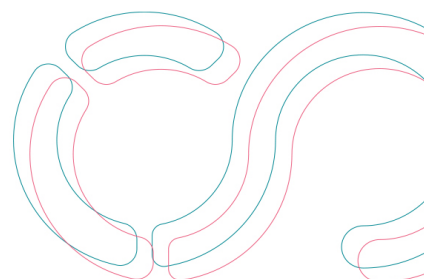
Submit



## 2.4.3 User roles and capabilities

Use the table below to see what each role can do in the EOSC Monitoring Tool.

Capability	Viewer	Editor	Submitter
View surveys & submissions	✓	✓	✓
Edit draft submissions	✗	✓	✓
Submit final responses	✗	✗	✓
View organisation-level data	✓	✓	✓
View submission trends	✓	✓	✓
Complete own profile	✓	✓	✓



## 3 Managing a Survey Submission

This chapter explains how to manage a survey submission from start to finish and how to report to the EOSC Association. It shows where to find surveys on your dashboard, how to start and resume a draft, how to export a working copy, and how to submit a final response. It also provides step-by-step guidance for completing the Additional Activities Plan (AAP), the Additional Activities Report (AAR), and the Partnerships' KPI survey, together with a view of trends over time.

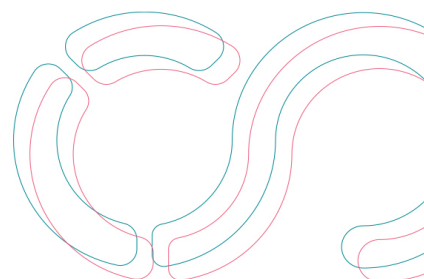
### 3.1 Surveys and submissions management

The **My Surveys** section of the EOSC Monitoring Tool shows the status of ongoing surveys and past submissions. It is organised into three sections:

1. Open surveys,
2. In draft,
3. Submitted.

#### 3.1.1 Open surveys

This section lists surveys your organisation can start. When a new wave (for example AAP 2027) is published, it appears here, and you can start your submission.



# My Surveys

## Test User

Test Organisation

- EOSC Monitoring Tool Home
- My Account
- User Guide
- Logout

Role in the EOSC Monitoring Tool:

Viewer(s)

Other registered members from your organisation:

- 
- 
- 
- 
- 

Open surveys   In draft   Submitted

Open Forms

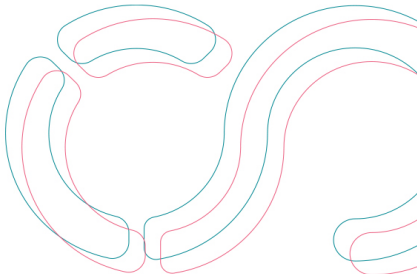
Category: KPI

Form Title	Days remaining	Category	Action
2026_KPI_SURVEY	<div> <div></div> <div>2 Days remaining</div> </div>	KPI	Take the survey

### 3.1.2 In draft

This section shows submissions in progress, whether started by you or another member of your organisation. You can reopen a draft, review responses, and complete it over time.

Deadline indicators in *Open surveys* and *In draft* sections show the number of days remaining to submit.



# My Surveys

## Test User

Role in the EOSC Monitoring Tool:  
Submitter(s)

Other registered members from your organisation:

- EOSC Monitoring Tool Home
- My Account
- User Guide
- Logout

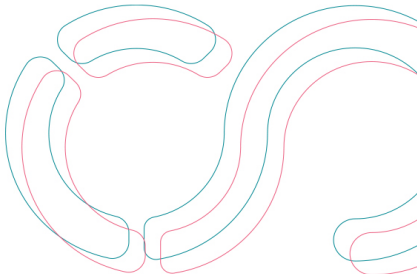
Open surveys   In draft   Submitted

Form	User	Last saved	Days remaining	Link	Category	PDF	CSV
AAP 2027 Final	Test User	27 Nov 2025 17:37:54	<div> <div></div> <div>2 Days remaining</div> </div>	<a href="#">Continue</a>	AAP	<a href="#">Download PDF</a>	<a href="#">Download CSV</a>

### 3.1.2.1 Download and Export to PDF/CSV and Save and Continue Later

#### 3.1.2.1.1 Download form to PDF/CSV

The Download to PDF/CSV button is available on the **My Surveys** page, in both the *In Draft* and *Submitted* sections. It allows the user to download a copy of the survey containing only the organisation’s own responses. As a result, the exported file will display solely the answers submitted by that organisation.



## My Surveys

Test User

- EOSC Monitoring Tool Home
- My Account
- User Guide
- Logout

Role in the EOSC Monitoring Tool:

Submitter(s)

Other registered members from your organisation:

Open surveys

In draft

Submitted

Form	User	Last saved	Days remaining	Link	Category	PDF	CSV
AAP 2027 Final	Test User	27 Nov 2025 17:37:54	<div> <div></div> <div>2 Days remaining</div> </div>	Continue	AAP	Download PDF	Download CSV

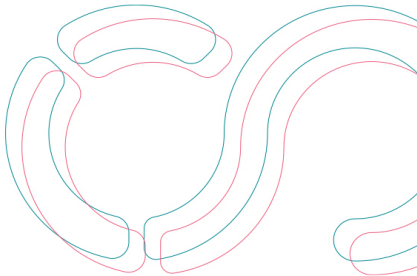
### 3.1.2.1.2 Export form to PDF/CSV

You can export the survey template together with any entered responses as a PDF or CSV for sharing or internal archiving. The **“Export form to PDF/CSV”** button is available at the bottom of each survey page and allows you to export a blank copy of the template.

**Note:** The export of a draft survey includes all possible questions and does not apply the online conditional logic. Your file may therefore list more questions than are required for your organisation. Use the export for review only and submit your final responses online.

### 3.1.2.1.3 Save and Continue Later

Use **“Save and Continue Later”** at the bottom of the page to save your work as a draft and return to it when convenient.



[Home](#) / [AAP2027](#)

## AAP2027

- 1** INTRODUCTION TO IN-KIND ADDITIONAL ACTIVITIES
- 2** SECTION I – SURVEY INSTRUCTIONS
- 3** CATEGORY 1 – SUPPORT TO ADDITIONAL R&I
- 4** CATEGORY 2 – SCALE UP OF TECHNOLOGIES
- 5** CATEGORY 3 – DEMONSTRATORS
- 6** CATEGORY 4 – CREATING NEW BUSINESS OPPORTUNITIES
- 7** CATEGORY 5 – TRAINING & SKILLS DEVELOPMENT
- 8** CATEGORY 6 – CONTRIBUTION TO THE DEVELOPMENT OF NEW STANDARDS, REGULATIONS & POLICIES
- 9** CATEGORY 7 – SUPPORTING ECOSYSTEM DEVELOPMENT
- 10** CATEGORY 8 – COMMUNICATION, DISSEMINATION, AWARENESS RAISING, CITIZEN ENGAGEMENT
- 11** CATEGORY 9 – OTHER
- 12** SECTION II – CASE STUDY

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 totaling to at least €500 million, over the duration of the partnership (until the end of 2030), 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 2027 survey is to define the budget resulting from the forecast provisions of Additional Activities by EOSC-Association Members, for 2027; and, ultimately, to present the “Additional Activities Plan” (AAP), for 2027, to the EOSC Partnership Board.**

The survey will remain open until **Tuesday 31st March 2026**. 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/additional-activities-surveys-training-and-support/>

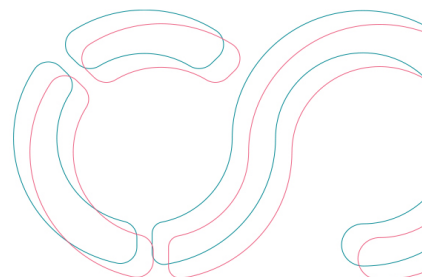
For any concern, please, contact us: [monitoring@eosc.eu](mailto:monitoring@eosc.eu)

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

Next
Save and Continue Later

Export blank template to PDF
Export blank template to CSV

Once saved, you will receive the following message. Click on **My Surveys** to go to the main surveys page.



[Home](#) / [AAP2027](#)

AAP2027

eosc | Monitoring Tool

## Form Saved Successfully

You can access and complete this form from any computer by going to My Surveys, or directly using the link below.

To review your work, you may download your draft submission (PDF/CSV) with only the current answers from the In Drafts section in My Surveys.

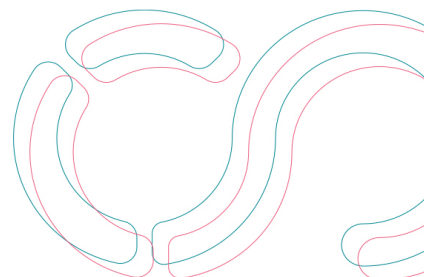
[Go to My Surveys](#)

### 3.1.3 Submitted

In the *Submitted* section, you can view your organisation's historical survey submissions, grouped as follows:

- **AAP – Reviewed:** the final, approved version of your Additional Activities Plan after the EOSC Association/EC review (used for reporting and trends).
- **AAR:** your Additional Activities Report as submitted for the corresponding year (used for reporting and trends).
- **KPI – Reviewed:** the final, validated KPI record after review (used for reporting).
- **KPI:** your original KPI submission (read-only, after validation will be saved as KPI – Reviewed).

Each entry shows the submission timestamp, the user who submitted the survey and provides download links (e.g., Export to PDF/CSV). Where a Reviewed record exists, it supersedes the original for dashboards and aggregates; the original remains available for audit and comparison.



## My Surveys

### Test User

Role in the EOSC Monitoring Tool:

Submitter(s)

Other registered members from your organisation:

- EOSC Monitoring Tool Home
- My Account
- User Guide
- Logout

Open surveys

In draft

Submitted

### AAP Reviewed

Form	User	Submitted	Category	PDF	CSV
AAP 2025 - Approved		18 Mar 2025 12:49:51	AAP Reviewed	<a href="#">Download PDF</a>	<a href="#">Download CSV</a>
AAP 2024 - Approved		10 Sept 2023 02:00:00	AAP Reviewed	<a href="#">Download PDF</a>	<a href="#">Download CSV</a>
AAP 2023 - Approved		18 Oct 2022 02:00:00	AAP Reviewed	<a href="#">Download PDF</a>	<a href="#">Download CSV</a>
AAP 2022 - Approved		18 Oct 2021 02:00:00	AAP Reviewed	<a href="#">Download PDF</a>	<a href="#">Download CSV</a>
AAP 2026		26 Nov 2025 23:24:30	AAP Reviewed	<a href="#">Download PDF</a>	<a href="#">Download CSV</a>

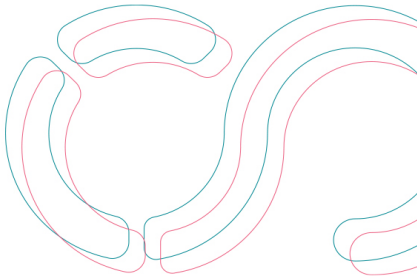
### AAR

Form	User	Submitted	Category	PDF	CSV
AAR 2023		10 Sept 2023 02:00:00	AAR	<a href="#">Download PDF</a>	<a href="#">Download CSV</a>
AAR 2022		18 Oct 2021 02:00:00	AAR	<a href="#">Download PDF</a>	<a href="#">Download CSV</a>
AAR 2024		27 Sept 2023 08:57:30	AAR	<a href="#">Download PDF</a>	<a href="#">Download CSV</a>

Trends Over the Years for AAP and AAR

### KPI Reviewed

Form	User	Submitted	Category	PDF	CSV
KPI 2024 - Validated		10 Sept 2023 04:00:00	KPI Reviewed	<a href="#">Download PDF</a>	<a href="#">Download CSV</a>
KPI 2022 - Validated		01 Jun 2022 04:00:00	KPI Reviewed	<a href="#">Download PDF</a>	<a href="#">Download CSV</a>



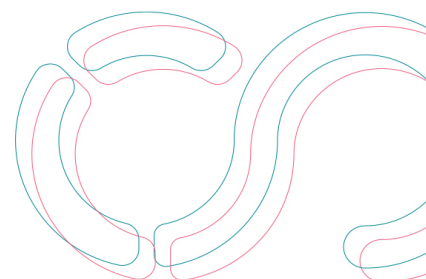
## 3.2 Monitoring of in-kind contributions (AAP and AAR)

To support the strategic objectives outlined in the Memorandum of Understanding (MoU) between the European Commission and the EOSC Association (EOSC-A), EOSC-A and its Members have committed to mobilising a minimum of €500 million in additional activities by the end of 2030. These contributions are reported annually through the Additional Activities Plan (AAP) and represent voluntary investments made by Members in alignment with the EOSC Strategic Research and Innovation Agenda (SRIA). Importantly, **these activities must not be funded by European Union programmes—except for the Structural Funds and the Recovery and Resilience Facility**—and must be provided either in cash or in-kind by the contributing organisations.

The survey is structured in nine categories. The nine defined categories include a wide range of initiatives such as support to additional research and innovation (e.g. FAIRification tools, infrastructure upgrades), scaling up technologies and project outcomes, piloting demonstrators and new platforms, and fostering new business opportunities. Additional categories address training and skills development, contributions to standardisation and policy, ecosystem development (including financing models and KPI monitoring), and outreach and communication efforts. **Members are encouraged to report activities that advance the EOSC vision and contribute to the long-term sustainability of Open Science in Europe.**

The in-kind contributions data collection process involves two steps: first, submitting planned contributions; second, validating them after implementation. This is supported by two required surveys:

- **Additional Activities Plan (AAP)** – Forecast contributions for the upcoming year are collected via the AAP survey. Once all Member submissions are received, they are anonymised and shared with the European Commission for validation and correction. The final, approved version will appear on the EOSC Monitoring Tool dashboard under **Additional Activities Reviewed**—this will represent your officially submitted AAP.
- **Additional Activities Report (AAR)** – Validation of previously submitted planned contributions.



Open surveys In draft Submitted

### AAP Reviewed

Form	User	Submitted	Category	PDF	CSV
AAP 2025 - Approved		18 Mar 2025 12:49:51	AAP Reviewed	<a href="#">Download PDF</a>	<a href="#">Download CSV</a>
AAP 2024 - Approved		10 Sept 2023 02:00:00	AAP Reviewed	<a href="#">Download PDF</a>	<a href="#">Download CSV</a>
AAP 2023 - Approved		18 Oct 2022 02:00:00	AAP Reviewed	<a href="#">Download PDF</a>	<a href="#">Download CSV</a>
AAP 2022 - Approved		18 Oct 2021 02:00:00	AAP Reviewed	<a href="#">Download PDF</a>	<a href="#">Download CSV</a>
AAP 2026		26 Nov 2025 23:24:30	AAP Reviewed	<a href="#">Download PDF</a>	<a href="#">Download CSV</a>

### AAR

Form	User	Submitted	Category	PDF	CSV
AAR 2023		10 Sept 2023 02:00:00	AAR	<a href="#">Download PDF</a>	<a href="#">Download CSV</a>
AAR 2022		18 Oct 2021 02:00:00	AAR	<a href="#">Download PDF</a>	<a href="#">Download CSV</a>
AAR 2024		27 Sept 2023 08:57:30	AAR	<a href="#">Download PDF</a>	<a href="#">Download CSV</a>

Trends Over the Years for AAP and AAR

## 3.2.1 Additional Activities Plan – Filling in the survey

All new surveys are displayed in the *Open surveys* section of your dashboard (refer to [3.1.2.1 Download and Export to PDF/CSV and Save and Continue Later](#)).

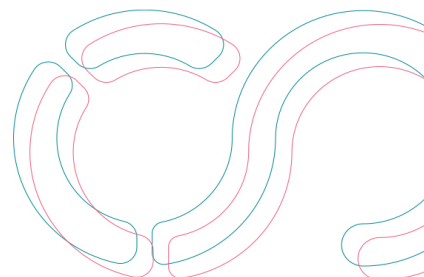
### 3.2.1.1 Survey structure

The survey structure consists of:

1. **Introduction:** A brief introduction to the in-kind additional activities survey.
2. **Section I: Additional Activities:** This section includes the survey description and the main survey form, structured around nine predefined activity categories.
3. **Section II: Additional Activities: Case Study:** Highlights real examples of successful activities, offering insights into challenges, solutions, and impact within the EOSC context.

#### 3.2.1.1.1 Introduction to In-Kind Additional Activities

The first tab provides a short introduction to Additional Activities, explaining their purpose within the EOSC Partnership, their connection to the Memorandum of Understanding, and the requirement for Members and Mandated Organisations to report both planned and actual contributions each year. It also outlines how the collected information is used to prepare the official Additional Activities Plan presented to the EOSC Partnership Board.



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## AAP2027

1	INTRODUCTION TO IN-KIND ADDITIONAL ACTIVITIES	2	SECTION I – SURVEY INSTRUCTIONS	3	CATEGORY 1 – SUPPORT TO ADDITIONAL R&I
4	CATEGORY 2 – SCALE UP OF TECHNOLOGIES	5	CATEGORY 3 – DEMONSTRATORS	6	CATEGORY 4 – CREATING NEW BUSINESS OPPORTUNITIES
7	CATEGORY 5 – TRAINING & SKILLS DEVELOPMENT	8	CATEGORY 6 – CONTRIBUTION TO THE DEVELOPMENT OF NEW STANDARDS, REGULATIONS & POLICIES		
9	CATEGORY 7 – SUPPORTING ECOSYSTEM DEVELOPMENT	10	CATEGORY 8 – COMMUNICATION, DISSEMINATION, AWARENESS RAISING, CITIZEN ENGAGEMENT		
11	CATEGORY 9 – OTHER	12	SECTION II – CASE STUDY		

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 totaling to at least €500 million, over the duration of the partnership (until the end of 2030), 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 2027 survey is to define the budget resulting from the forecast provisions of Additional Activities by EOSC-Association Members, for 2027; and, ultimately, to present the “Additional Activities Plan” (AAP), for 2027, to the EOSC Partnership Board.**

The survey will remain open until **Tuesday 31st March 2026**. 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/additional-activities-surveys-training-and-support/>

For any concern, please, contact us: [monitoring@eosc.eu](mailto:monitoring@eosc.eu)

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

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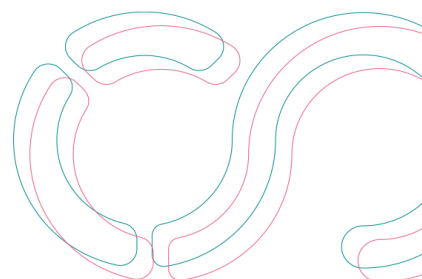
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Once completed, select “**Next**” to move to the next category.

For more information on saving drafts and exporting data, see [3.1.2.1 Export form to PDF/CSV and Save and continue later](#).

### 3.2.1.1.2 Section I: Survey Instructions

This tab explains the structure of the survey and outlines key points to consider before completing it. These include pro-rating activities that span multiple years, providing the number of Full-Time Equivalents (FTEs) involved, indicating the monetary value of each activity (including the FTEs), and adding a description that highlights the activity's relevance to EOSC.



☒ INTRODUCTION TO IN-KIND ADDITIONAL ACTIVITIES
 ☒ **2 SECTION I – SURVEY INSTRUCTIONS**
☐ 3 CATEGORY 1 – SUPPORT TO ADDITIONAL R&I

☐ 4 CATEGORY 2 – SCALE UP OF TECHNOLOGIES
 ☐ 5 CATEGORY 3 – DEMONSTRATORS
 ☐ 6 CATEGORY 4 – CREATING NEW BUSINESS OPPORTUNITIES

☐ 7 CATEGORY 5 – TRAINING & SKILLS DEVELOPMENT
 ☐ 8 CATEGORY 6 – CONTRIBUTION TO THE DEVELOPMENT OF NEW STANDARDS, REGULATIONS & POLICIES

☐ 9 CATEGORY 7 – SUPPORTING ECOSYSTEM DEVELOPMENT
 ☐ 10 CATEGORY 8 – COMMUNICATION, DISSEMINATION, AWARENESS RAISING, CITIZEN ENGAGEMENT

☐ 11 CATEGORY 9 – OTHER
 ☐ 12 SECTION II – CASE STUDY

The AAP questionnaire comprises two sections:

- Section I: "Additional activities 2027", requesting information on forecast contributions for 2027;
- Section II: "Additional activities 2027: case studies", asking for a detailed description of at least one flagship initiative among the planned activities reported in Section I.

Please note:

- Respondents should only take the survey once. If you need to close the survey before you have finished, please save it as a draft.
- Responses are editable until you submit the survey.
- All questions marked as *Required* are mandatory.

Before completing the survey:

The survey is structured into nine categories (defined by the European Commission) and a number of activity types for each category. Members should choose the category or categories that best describes the activity/ies they plan to contribute and insert the description and amount of their contributions in the applicable 'Activity Types'.

**FOR ACTIVITIES THAT EXTEND OVER MORE THAN ONE YEAR, PLEASE PRO-RATE THE AMOUNT ACCORDINGLY** – example: upgrade of research infrastructure that will take place over 4 years, total investment, 40 MEUR – In the AAP survey the organisation should report the portion of expenditure related to the specific AAP year, e.g. 10 MEUR.

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, in terms of:

Full-Time Equivalents (FTEs): and

The monetary value\* (€) of the described activities, including 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 all the types of activities that apply to your AAP, please also provide a careful and concise description of the activity, highlighting its relevance to EOSC, and a relevant weblink (if available). At least one flagship initiative can be described in full details in the last section (II) of the survey.

The survey applies a standard conversion factor of **1 FTE = €100,000**. If a different factor is used by an organisation, this alternative value should be indicated in the designated field.

For your information, we will use a standard conversion factor of 100.000 EUR (one hundred thousand Euros) per 1 Full Time Equivalent (FTE) to calculate the monetary value of your FTE contributions. If the applied conversion factor for 1 FTE is significantly different than 100K Euro, you may optionally indicate this value at the end of this section.

Is the applied conversion factor for 1 FTE equal to one hundred thousand euros (100.000 EUR)?

No, it is different

Please provide a conversion factor for 1 FTE: (use round numbers, without decimal places e.g.: 100.500 EUR or 100500 EUR) **(Required)**

Please do NOT use COMAS as a thousand separator as this indicate decimal places.

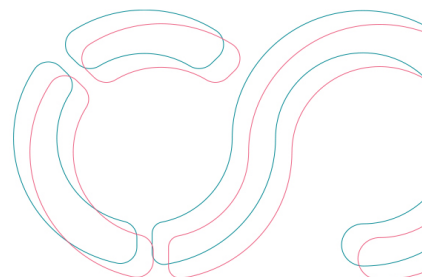
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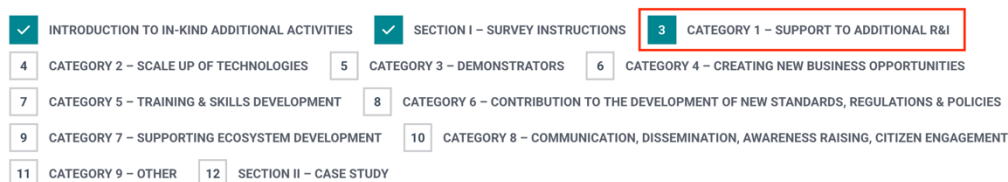
### 3.2.1.1.3 Section I: Additional activities

The survey is organised into nine categories, each presented in a separate tab and following the same format. This guide provides one example category to illustrate the survey's structure.

The first part of the “Category 1 – Support to Additional R&I” tab, contains an explanation of the category:

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AAP2027



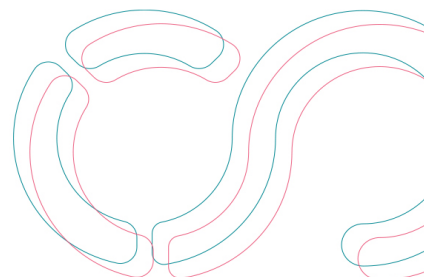
**CATEGORY 1 SUPPORT TO ADDITIONAL RESEARCH AND INNOVATION** covers the following additional (i.e., not funded through Horizon Europe/Horizon 2020 in the context of the partnership) activities:

- 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 or public entities, which are members of the EOSC Association, funded through, for instance, a regional or national R&I funding programme or their 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 Technology Readiness Levels (TRLs).

In the second part, the relevant activity types must be selected from the dropdown menu. All activity types are set to “*Not applicable*” by default; organisations should change the dropdown menu to “*Applicable*” for any activity type that applies to their case. Selecting “*Applicable*” reveals additional fields for information such as FTEs, financial contributions, activity descriptions, and funding sources. All required details should be provided consistently across the nine categories.



Please select all activity types that apply to your organisation (you may choose one, multiple, or none).

ACTIVITY TYPE 1.1 Upgrade of existing research (e-)infrastructures that may be federated through EOSC.

☐ Applicable
 ☒ Not applicable

ACTIVITY TYPE 1.3 Deployment of online tools for FAIRification [including help creating FAIR Data Management Plans].

ACTIVITY TYPE 1.4 Development and publication of large-scale studies.

ACTIVITY TYPE 1.5 Contribution to operating core functions of a Minimum Viable EOSC ecosystem.

Once the applicable activity types are selected, the corresponding fields are displayed, allowing the organisation to enter the relevant information for each specific activity.

ACTIVITY TYPE 1.1 Upgrade of existing research (e-) infrastructures that may be federated through EOSC – DETAILS.

ACTIVITY TYPE 1.1 Estimated NUMBER OF FTEs contributing to additional activities (1 decimal place max):

(Required)

Please use COMMAS as the decimal separator.

ACTIVITY TYPE 1.1 Estimated FINANCIAL CONTRIBUTIONS including the number of FTEs reported, in euro:

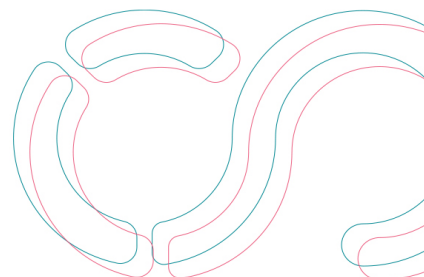
(Required)

Please do NOT use COMMAS as a thousand separator as this indicates decimal places.

ACTIVITY 1.1 – ACTIVITY DESCRIPTION: Please describe (max 500 words) your 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 multidisciplinary – expected outcome and impact – implementation and/or impact timeline – WEBPAGE address : –

(Required)

- Note the number of FTEs should contain a maximum of one decimal place.
- Financial contributions are the sum of FTEs (x conversion factor) AND other spending.  
 Example: Number of FTEs 2,5 x conversion factor (100K) = 250,000 EUR + Other spending (25K) = 275,000 EUR. 275K is the amount that should be reported.



- The **"Description" field** should have a clearly explained link between the indicated activity and EOSC, including how it relates to EOSC (e.g. "Through EOSC", "in EOSC-compatible frameworks" or "discoverable within EOSC").

The following format should be used **when describing the activity**:

- Name of the initiative/project/action,
- Primary purpose,
- Which communities/stakeholders are involved,
- Which communities/stakeholders are addressed (e.g. discipline clusters),
- Expected outcome and impact,
- Implementation and/or impact timeline,
- Webpage address.

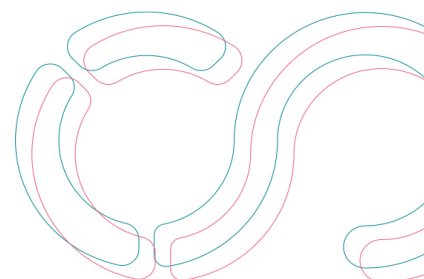
#### Examples of activity descriptions:

- "Scaling up the X e-infrastructure capabilities of X data centres and improving their connectivity with the EOSC and other European infrastructures".
- "Implementation of interfaces under the project X to integrate computing and data management solutions to ease access and reuse data".
- "Upgrading of X data storage infrastructures under the X action with the aim to improve EOSC-related services".

Finally, for each reported activity, funding details must be completed using the survey's **Funding Source table**. Please indicate the percentage of the activity covered by each funding stream—these percentages **must total 100%**.

There are nine funding streams available for selection:

1. European Regional Development Fund (ERDF)
2. European Social Fund Plus (ESF+)
3. Cohesion Fund (CF)
4. European Agricultural Fund for Rural Development (EAFRD)
5. European Maritime, Fisheries and Aquaculture Fund (EMFAF)
6. National/Regional Funds
7. Institutional Funds
8. Private donors
9. Other



Example (total equals 100%):

**FUNDING SOURCE ACTIVITY TYPE 1.1 – % of funding invested for this activity (from the specified source below).**

- Total for this Activity type should sum up to 100%.
- Use round numbers without decimal places and separators such as commas or dots, e.g.: 45, 5, 50.

<p><b>1. NATIONAL / REGIONAL FUNDS.</b></p> <div>50</div> <p>Please enter a number from 0 to 100.</p>	<p><b>2. EUROPEAN SOCIAL FUND PLUS (ESF+).</b></p> <div>25</div> <p>Please enter a number from 0 to 100.</p>	<p><b>3. COHESION FUND (CF).</b></p> <div>0</div> <p>Please enter a number from 0 to 100.</p>
<p><b>4. EUROPEAN AGRICULTURAL FUND FOR RURAL DEVELOPMENT (EAFRD).</b></p> <div>0</div> <p>Please enter a number from 0 to 100.</p>	<p><b>5. EUROPEAN MARITIME, FISHERIES AND AQUACULTURE FUND (EMFAF).</b></p> <div>0</div> <p>Please enter a number from 0 to 100.</p>	<p><b>6. EUROPEAN REGIONAL DEVELOPMENT FUND (ERDF).</b></p> <div>0</div> <p>Please enter a number from 0 to 100.</p>
<p><b>7. INSTITUTIONAL FUNDS.</b></p> <div>25</div> <p>Please enter a number from 0 to 100.</p>	<p><b>8. PRIVATE DONORS.</b></p> <div>0</div> <p>Please enter a number from 0 to 100.</p>	<p><b>9. OTHER.</b></p> <div>0</div> <p>Please enter a number from 0 to 100.</p>

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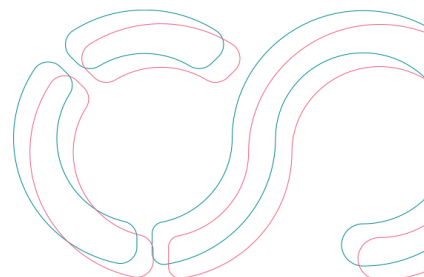
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### 3.2.1.1.4 Section II: Additional Activities: Case Study

This section is used to report on impact case studies, which are valuable as they showcase real-world examples of effective strategies, offering practical insights into challenges, solutions, and outcomes. They highlight what works in practice and support learning and replication within the EOSC context.

What are case studies?

- Real-life and practical examples, presenting a challenge or a situation that enables the identification and discussion of 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.



## Examples:

- 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.

## Steps:

1. Select the **Additional Activity category** your case falls under (one of nine categories):

11 CATEGORY 9 – OTHER 12 SECTION II – CASE STUDY

### CASE STUDY 1

Additional Activity category. (Required)

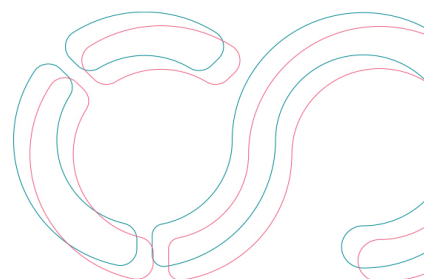
✓ Please select category type

- Category 1. Support to additional R&I
- Category 2. Scale up of technologies
- Category 3. Demonstrators
- Category 4. Creating new business opportunities
- Category 5. Training & skills development
- Category 6. Contribution to the development of new standards, regulations, and policies
- Category 7. Supporting ecosystem development
- Category 8. Communication, dissemination, awareness raising, citizen engagement
- Category 9. Other

☐ Good practice: A good practice is a method or technique that has been proven to be effective in achieving a particular goal or objective. It is generally accepted as a standard way of doing something within a particular industry or field.

☐ Best practice: A best practice is a method or technique that has been identified as the most effective way of achieving a particular goal or objective. It is based on extensive research and experience, and is considered to be the optimal way of doing something within a particular industry or field.

2. Select the **type of contribution** applicable to your case and the **Activity name**:



Please, select the type of contribution. (Required)

- ☐ Use case: A use case is a description of how a system or product will be used in real-world situations. It typically includes a detailed description of the interactions between the user and the system, as well as the expected outcomes and benefits of using the system.
- ☐ Case study: Case studies are real life, retrospective accounts of real projects and initiatives that you have delivered for real customers/users. A case study is an in-depth analysis of a particular situation or problem, usually focusing on a specific company, organisation, or individual. It typically includes detailed information about the context, the challenges faced, the strategies used, and the outcomes achieved.
- ☐ Good practice: A good practice is a method or technique that has been proven to be effective in achieving a particular goal or objective. It is generally accepted as a standard way of doing something within a particular industry or field.
- ☐ Best practice: A best practice is a method or technique that has been identified as the most effective way of achieving a particular goal or objective. It is based on extensive research and experience, and is considered to be the optimal way of doing something within a particular industry or field.

Title/short name of the Activity. (Required)

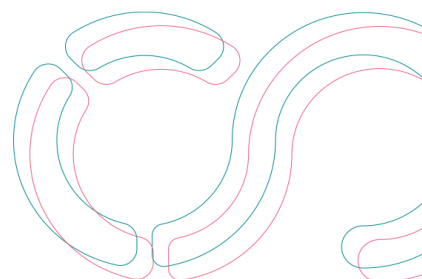
3. If the activity is the result of the **collaboration** between 2+ institutions, please specify in a separate field the name of the leading organisation and collaborators:

Name of leading organisation (if different). (Required)

Other collaborators.

4. In the next steps, select the timeframe of implementation, relevant groups of targeted stakeholders, the current scale(s) of application, and the applicable field(s) of science and technology by ticking all that apply.

**Note:** "Targeted stakeholders" are those for whom the activity is primarily intended.



Timeframe of implementation. **(Required)**

Year or range of years

Please, select the group of targeted stakeholders for this activity from the options below (Tick-box – choose as many as applicable). **(Required)**

- ☐ Researchers
- ☐ Decision- and policy-makers
- ☐ Industry
- ☐ Citizens

Please, select the current scale of application, from the options below (Tick-box – choose as many as applicable). **(Required)**

- ☐ Institutional
- ☐ Regional
- ☐ National
- ☐ International

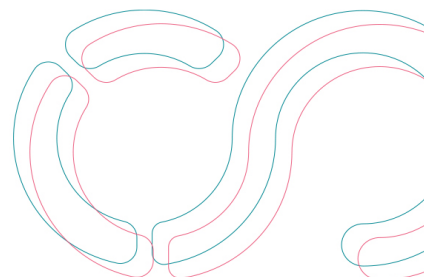
Please, select the field of science and technology where the case is currently applied, from the options below (Tick-box – choose as many as applicable). **(Required)**

- ☐ Natural Sciences
- ☐ Engineering and Technology
- ☐ Medical and Health Sciences
- ☐ Agricultural Sciences
- ☐ Social Sciences
- ☐ Humanities

## 5. Select the in-kind value and the funding source.

**In-kind value in euros – economic investment, including both FTE costs and other investments. (Required)**

- ☐ < 100K EUR
- ☐ 100K – 250K EUR
- ☐ 250K – 500K EUR
- ☐ 500K – 1M EUR
- ☐ 1M – 10M EUR
- ☐ < 10M EUR



Please, select Funding sources from the options below (Tick-box – choose as many as applicable). **(Required)**

- ☐ European regional development fund (ERDF)
- ☐ European social fund plus (ESF+)
- ☐ Cohesion fund (CF)
- ☐ European agricultural fund for rural development (EAFRD)
- ☐ European maritime, fisheries and aquaculture fund (EMFAF)
- ☐ National funds
- ☐ Regional funds
- ☐ Institutional funds
- ☐ Private donors
- ☐ Other

6. **Describe the activity and the problem addressed** with a maximum of 60 words each. An example of a problem addressed for a Data Stewardship programme could highlight issues such as the need for consistent data curation and the need for a cultural shift to support inclusive, long-term data reuse across disciplines, institutions, and countries.

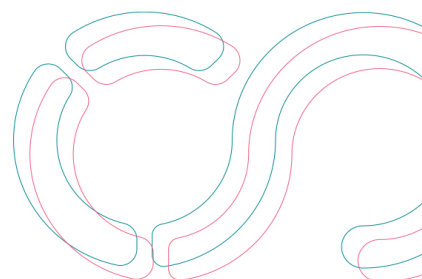
Please, describe your Activity and highlight its relevance to EOSC and the SRIA objectives. Begin this statement by repeating the "title/short name of the activity" as entered above (max 60 words). **(Required)**

0 of 360 max characters

Please, describe the Problem Addressed (max 60 words). **(Required)**

0 of 360 max characters

7. The next section focuses on **Added Values** and includes three short fields, each limited to 20 words. This part aims to capture what new value the activity brings to the EOSC ecosystem, how it will improve the current situation, and why it is significant for the



target group—highlighting the difference it makes before and after its implementation if relevant.

1st Added Value (max 20 words). (Required)

0 of 130 max characters

2nd Added Value (max 20 words). (Required)

0 of 130 max characters

3rd Added Value (max 20 words). (Required)

0 of 130 max characters

8. The next two fields focus on **results**.

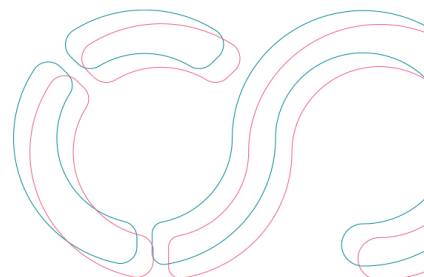
**Field 1 – Result type(s):** select all applicable result types.

Please, select Type of result from the options below (Tick-box – choose as many as applicable). (Required)

- ☐ Network
- ☐ Training
- ☐ Report
- ☐ Software
- ☐ Social impact demonstrator
- ☐ Infrastructure
- ☐ Toolkit
- ☐ Service
- ☐ Tool

**Field 2 – Results (Quantitative):** Describe 3 relevant results following the format:

- Number: X
- Header for the number 1: max 5 words



- Description text for the number: max 10 words

Example: 250 / Indexed resources / number of institutional repositories available.

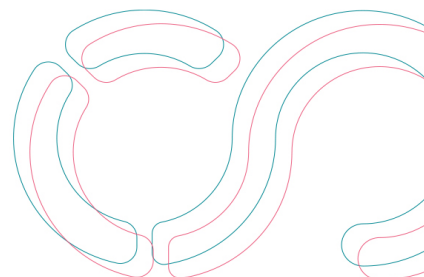
Results (Quantitative). Please describe the results of this activity and provide some quantifiable examples of your case study. Limit to 3 most impactful numbers following this format: Number/Title /Description. Example: 250 / Indexed resources / Number of institutional repositories and scientific journals available at this institution.

Number 1 (Required)	Header for number 1 (max 5 words). (Required)	Descriptive text for number 1 (max 10 words). (Required)
250	Indexed resources 17 of 30 max characters	Number of institutional repositories available 46 of 70 max characters

9. Select as many **SRIA General Objectives** and **Macro-Roadmap areas** as applicable before moving to the next section:

SRIA General Objective addressed (Tick-box – choose as many as applicable). (Required)

- ☐ G01: Ensure that Open Science practices and skills are rewarded and taught, becoming the 'new normal'.
- ☐ G02: Enable the definition of standards, and the development of tools and services, to allow researchers to find, access, reuse and combine results.
- ☐ G03: Establish a sustainable and federated infrastructure enabling open sharing of scientific results.



Macro-Roadmap Area (select all that apply). Please make sure to choose at least one Macro-Roadmap area before moving on to the next question.

**Implementation challenges.**

- ☐ EOSC interoperability
- ☐ FAIR metrics & certification
- ☐ Metadata and ontologies
- ☐ Persistent Identifiers
- ☐ Software
- ☐ User / Resource provider environments

**Landscape, Monitoring and Engagement.**

- ☐ Engaging ESFRIs
- ☐ Landscape Monitoring
- ☐ Widening to public and private sectors & going global

**Skills, training, rewards, recognition.**

- ☐ Reward and recognition
- ☐ Skills and training

**Supporting grand societal challenges.**

- ☐ Cancer mission
- ☐ Ocean mission
- ☐ Pandemic

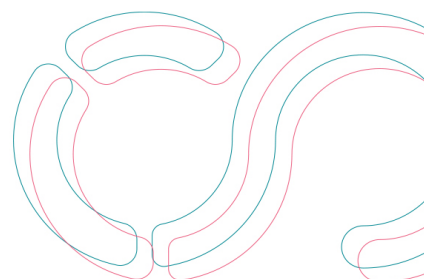
10. Finally, include a link to your case study (**website** field) and additional material.

Website. *(Required)*

Additional material (please insert relevant hyperlinks to additional resources, such as activity documentation, reports, pictures, etc.)

**Note:** When your case study is published in the Macro-Roadmap or through other channels, EOSC-A will contact you to request **high-quality images**.

11. If you want your case study to be public, further disseminated and visible, please give your **consent**:



I agree that the case study is made public, including the name and logo of the involved institution/s, except any personal detail: **(Required)**

- ☐ Yes  
☐ No

12. You will have the option to submit a **second case study**. While this is optional, it is highly encouraged. If you select “Yes”, a new section will appear mirroring all the fields from the first Case Study.

## CASE STUDY 2 (optional)

Do you wish to submit a second case study (optional)? **(Required)**

- ☐ Yes  
☐ No

13. The questionnaire is submitted by selecting the “**Submit**” button. Once submitted, the answers to the survey can be found in the Submitted area of the user dashboard and are stored in the AAP section. Refer to [3.2.3 Trends over the years for more information](#).

14. Select “**Previous**” to check your responses, “**Save and Continue Later**” to finish later, and “**Submit**” when you are ready.

You have almost completed the survey.

You can either click on SUBMIT your responses or go back to make changes. Please note, once you proceed, it will not be possible to further modify your responses.

Previous

Submit

Save and Continue Later

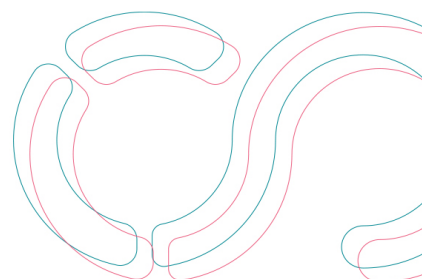
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Export blank template to CSV

With support of



Funded by  
the European Union



### 3.2.1.15 Review of Submitted AAP Survey Responses by the EOSC Association Monitoring Team

Once your AAP survey has been submitted, it will be reviewed by the EOSC Association Monitoring Team. They will verify that the number of FTEs and financial contributions are consistent and will contact you directly if any clarifications are needed.

Following this internal review, the data will be anonymised—excluding institutional names and financial figures—and shared with the European Commission (EC). The EC will examine the activity descriptions and may request clarifications or suggest reclassifying certain activities into more appropriate categories. Any requested changes will be discussed with you before a revised version is submitted.

Once the data has been finalised and agreed upon, an updated version of your AAP survey—labelled “AAP Reviewed”—will be uploaded to your dashboard, replacing your initial submission.

## 3.2.2 Additional Activities Report (AAR)

This survey is launched the year after your planned in-kind contributions have been submitted, to validate the previously estimated figures. The format remains the same and includes the data from your initial submission. You have two options:

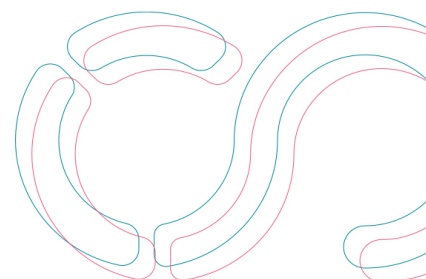
1. Confirm the figures as submitted
2. Update the values if your plans have changed

As with the AAP survey, you can save drafts, export and download your data in both PDF and CSV formats.

Once the validation is complete, simply select the **Submit** button to finalise your survey.

## 3.2.3 Trends Over the Years for AAP and AAR

In the **Submitted** section of the user dashboard, all completed surveys are listed and grouped as **AAP Reviewed** and **AAR**.



Open surveys In draft Submitted

## AAP Reviewed

Form	User	Submitted	Category	PDF	CSV
AAP 2025 - Approved	NationalScience CentrePoland	18 Mar 2025 12:49:51	AAP Reviewed	<a href="#">Download PDF</a>	<a href="#">Download CSV</a>
AAP 2024 - Approved	NationalScience CentrePoland	10 Sept 2023 02:00:00	AAP Reviewed	<a href="#">Download PDF</a>	<a href="#">Download CSV</a>
AAP 2023 - Approved	NationalScience CentrePoland	18 Oct 2022 02:00:00	AAP Reviewed	<a href="#">Download PDF</a>	<a href="#">Download CSV</a>
AAP 2022 - Approved	NationalScience CentrePoland	18 Oct 2021 02:00:00	AAP Reviewed	<a href="#">Download PDF</a>	<a href="#">Download CSV</a>
AAP 2026	NationalScience CentrePoland	26 Nov 2025 23:24:30	AAP Reviewed	<a href="#">Download PDF</a>	<a href="#">Download CSV</a>

## AAR

Form	User	Submitted	Category	PDF	CSV
AAR 2023	NationalScience CentrePoland	10 Sept 2023 02:00:00	AAR	<a href="#">Download PDF</a>	<a href="#">Download CSV</a>
AAR 2022	NationalScience CentrePoland	18 Oct 2021 02:00:00	AAR	<a href="#">Download PDF</a>	<a href="#">Download CSV</a>
AAR 2024	NationalScience CentrePoland	27 Sept 2023 08:57:30	AAR	<a href="#">Download PDF</a>	<a href="#">Download CSV</a>

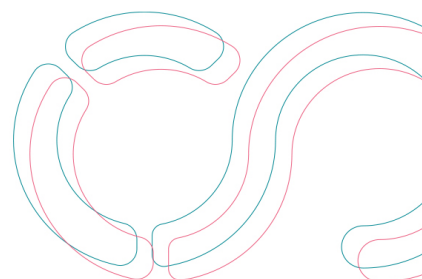
[Trends Over the Years for AAP and AAR](#)

The system provides visual dashboards to analyse your survey data over time. You can explore how your organisation has contributed to AAP and AAR surveys across different years. These dashboards include:

- Charts tracking efforts (FTEs) and financial contributions.
- Trend comparisons between AAP planning and AAR confirmation.

These insights support evidence-based planning and help you monitor your organisation's performance and engagement with EOSC-A activities.

This feature allows users to filter by the different activity types (FTEs and financial contributions) using the dropdown field at the top of the screen.



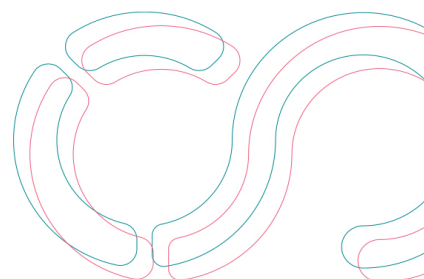
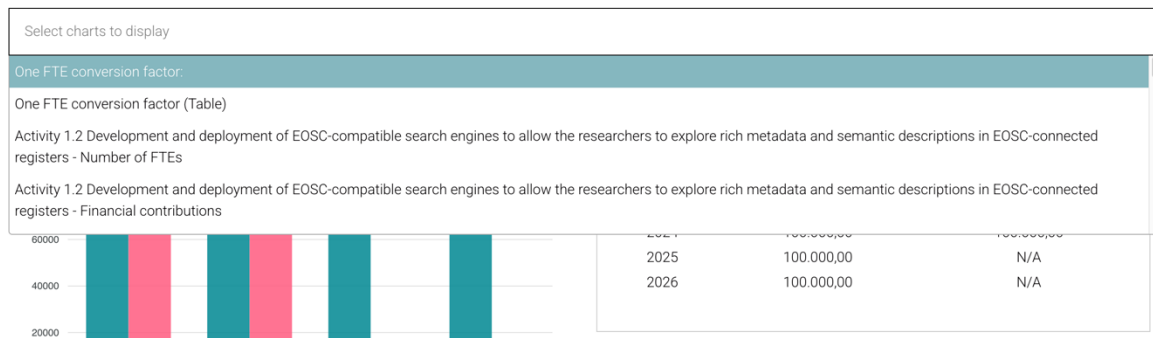
[Home](#)
[Back to My Surveys](#)

Trends Over the Years for

in EOSC AAP-REVIEWED\_AAR

This page allows you to view and analyze the trends over the years for a specific user or category. Use the graphs below to gain insights into the submission patterns and performance.

GRAPHS FILTER:



[Home](#)  
[Back to My Surveys](#)

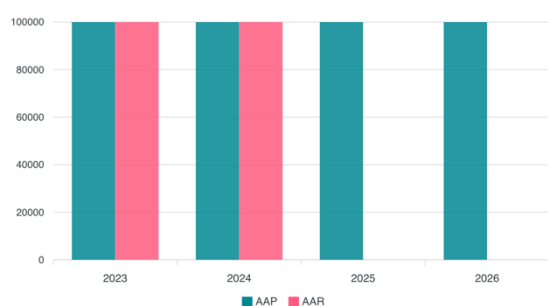
## Trends Over the Years for EOSC AAP-REVIEWED\_AAR

This page allows you to view and analyze the trends over the years for a specific user or category. Use the graphs below to gain insights into the submission patterns and performance.

GRAPHS FILTER:

Select charts to display

One FTE conversion factor:

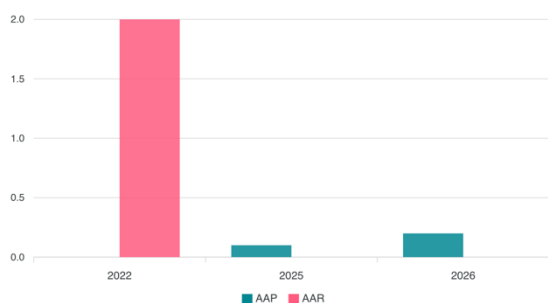


Hover over the bars to see the labels and values

One FTE conversion factor (Table):

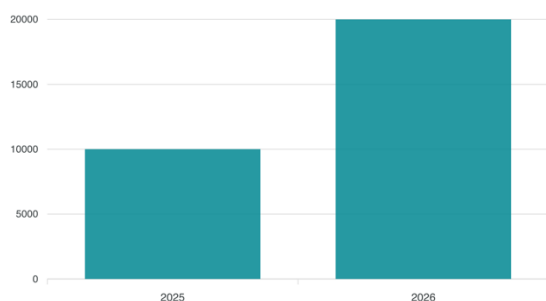
Year	AAP	AAR
2023	100.000,00	100.000,00
2024	100.000,00	100.000,00
2025	100.000,00	N/A
2026	100.000,00	N/A

Activity 1.2 Development and deployment of EOSC-compatible search engines to allow the researchers to explore rich metadata and semantic descriptions in EOSC-connected registers - Number of FTEs



Hover over the bars to see the labels and values

Activity 1.2 Development and deployment of EOSC-compatible search engines to allow the researchers to explore rich metadata and semantic descriptions in EOSC-connected registers - Financial contributions



Hover over the bars to see the labels and values

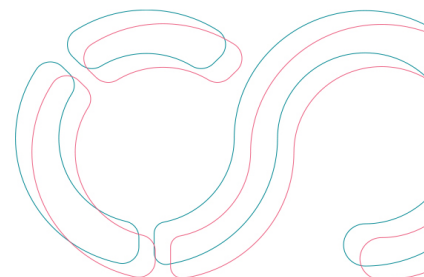
## Download options

To reuse charts or data, open the menu in the top-right corner of each chart and choose:

- Download SVG (vector image)
- Download PNG (raster image)
- Download CSV (underlying data)

## EOSC Association AISBL

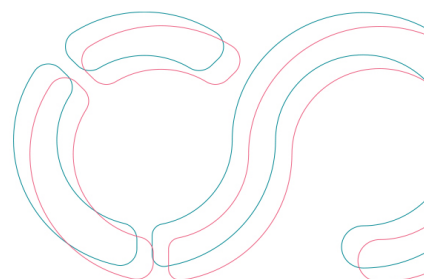
Rue du Luxembourg 3, BE-1000 Brussels, Belgium  
 +32 2 537 73 18 | [info@eosc.eu](mailto:info@eosc.eu) | [www.eosc.eu](http://www.eosc.eu)  
 Reg. number: 0755 723 931 | VAT number: BE0755 723 931



### Activity 5.1 Developing education, training, and skills in Open Science and FAIR data management by aligning curricula and training frameworks for researchers, civil servants, and policymakers - Number of FTEs



Hover over the bars to see the labels and values



## 3.3 Monitoring of Partnerships' KPIs

The EOSC Partnership's Monitoring and Evaluation Framework tracks the Partnership's progress towards its objectives. It enables a transparent and evidence-based evaluation of the Partnership's development.

Each KPI aligns with a designated strategic objective and is assigned clear target values and timelines, ensuring robust data collection and transparent reporting. The consistent methodology ensures that the information is meaningful both for measuring the Partnership's progress and for comparing and aggregating that progress across other EU Partnerships.

### 3.3.1 Filling in the Survey

All new surveys will be displayed in the **"Open surveys"** section of your dashboard. Refer to [3.1.1 Open surveys section](#).

#### 3.3.1.1 Survey structure

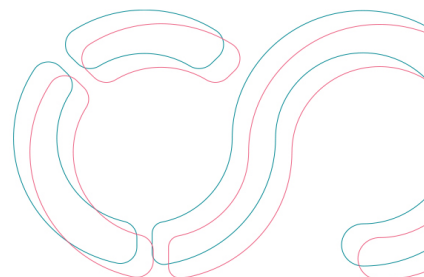
The survey is divided into 4 sections:

1. Introduction
2. Organisation
3. Questionnaire
4. Complete your submission

The survey questions vary based on the selected target group. Therefore, in Section 2 – Organisation, the type of organisation you choose will determine which questions you are asked to complete.

##### 3.3.1.1.1 Introduction

This section presents the purpose and structure of the EOSC Partnership KPI Survey and provides important information that respondents should review before completing the survey. To proceed, select the **"Next"** button at the bottom of the page.



[Home](#) / [2026\\_KPI\\_SURVEY\\_2](#) (1)

## 2026\_KPI\_SURVEY

**1** INTRODUCTION **2** ORGANISATION **3** QUESTIONNAIRE **4** COMPLETE YOUR SUBMISSION

Dear EOSC Association Members, dear Colleagues,

You are kindly invited to participate in the EOSC Partnership KPI Survey, as part of the regular biennial duty of the EOSC-A Association members.

The aim of this year's questionnaire is to measure the progress of our Key Performance Indicators (KPIs) against the EOSC SRIA objectives, during the years 2024-2025.

In order to reduce the survey burden, you will be asked to identify the type(s) of organisation that you represent, among the following cases. **You will only receive the set of questions that are relevant. However, it is extremely likely that you will need to choose more than one group:**

- Research Performing Organisation (RPO)
- Research Funding Organisation (RFO)
- Service Provider (SP)
- ESFRI Research Infrastructure (RI)
- Member/Observer of the EOSC Association
- Monitoring team at the EOSC Association (role reserved for the EOSC-A Secretariat)
- EC/EOSC-A (role is reserved for the EOSC-Association Secretariat and EC representatives)

Each question is labelled with a specific code (e.g.: 001\_01; S03\_02), which corresponds to the KPI code in the [EOSC Partnership Monitoring Framework \(v7.0\)](#); you may refer to this document to clarify the sense of the survey questions.

A series of training workshops will be held to help you navigate this survey and clear any doubts you may have. **You may register here:**

<https://eosc.eu/registration-webinars-for-respondents-to-biennial-kpi-survey-for-eosc-partnership/>

The data collected through this survey will be analysed in anonymised and aggregated form, for the EOSC Gravity report of the EOSC Partnership KPI-status assessment, to be published in early spring 2027.

The information will also flow into a series of reports for the EOSC Partnership evaluation by the EC.

We will be grateful for your feedback on the survey experience. If you wish to share your considerations, please use the optional comment box at the end of this questionnaire.

Thank you very much for your time and support!

[Next](#)

[Save and Continue Later](#)

[Export blank template to PDF](#)

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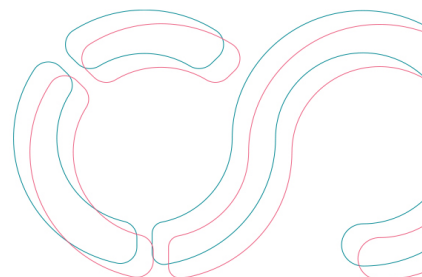
### 3.3.1.1.2 Organisation

Select all organisation types that apply. Your selection determines which questions you will see; the survey adapts dynamically so you only answer what is relevant to your organisation.

This is a **required field**, and it is **very likely** that you may need to select **more than one option**.

You may choose from the following categories:

- Research Performing Organisation (RPO)
- Research Funding Organisation (RFO)
- Service Provider (SP)
- ESFRI Research Infrastructure (RI)
- Member/Observer of the EOSC Association



- Monitoring team at the EOSC Association (role reserved for the EOSC-A Secretariat)
- EC/EOSC-A (role reserved for the EOSC-Association Secretariat and EC representatives)

[Home](#) / 2026\_KPI\_SURVEY\_2 (1)

## 2026\_KPI\_SURVEY

☒ INTRODUCTION
 ☒ 2 ORGANISATION
 ☐ 3 QUESTIONNAIRE
 ☐ 4 COMPLETE YOUR SUBMISSION

Please, choose the type(s) of organisation that you represent. It is very likely that you may need to choose more than one type. **(Required)**

- ☐ Research Performing Organisation (RPO)
- ☐ Research Funding Organisation (RFO)
- ☐ Service Provider (SP)
- ☐ ESFRI Research Infrastructure (RI)
- ☐ Member/Observer of the EOSC Association
- ☐ Monitoring team at the EOSC Association (role reserved for the EOSC-A Secretariat)
- ☐ EC/EOSC-A (role is reserved for the EOSC-Association Secretariat and EC representatives)

### IMPORTANT NOTICE

- Please, only move to the next page if you have selected **all** the relevant boxes from the choices provided above.
- Kindly ensure that your answers refer to the years 2024–2025.

[Previous](#)

[Next](#)

[Save and Continue Later](#)

[Export blank template to PDF](#)

[Export blank template to CSV](#)

### Note:

- You must select *all* organisation types that apply. The system allows multiple selections.
- Do not proceed to the next page until you have selected all relevant options.

### 3.3.1.1.3 Questionnaire

This section contains the main part of the survey. It includes two types of questions:

#### 1. Yes or No questions

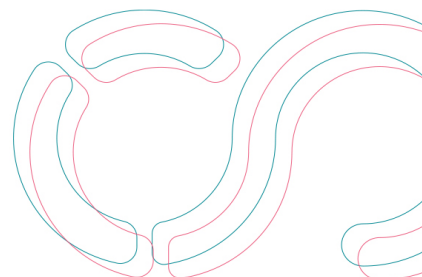
Most of the questions require a simple Yes or No response. These questions are designed to quickly assess whether your organisation has taken specific actions or implemented certain practices during the assessed period.

#### 2. Numeric input questions

If you select the organisation type “RPO”, you are also asked to provide numerical data for the questions below:

S01\_01 – Number of publications in total

S01\_01 – Number of publications available in Open Access



## S01\_01 – Number of publications available in Immediate Open Access

Please ensure the numbers you provide reflect the activities and outputs from the period indicated in the survey.

☒ INTRODUCTION
 ☒ ORGANISATION
 ☒ **3 QUESTIONNAIRE**
☐ 4 COMPLETE YOUR SUBMISSION

S01\_01 Please indicate the number of publications (e.g. articles, chapters, books, conference papers, policy papers, preprints, lecture notes) which your Research Performing Organisation released in 2025 and the number of them which were available in immediate (e.g. gold) open access.

S01\_01 NUMBER OF PUBLICATIONS IN TOTAL: (Required)

S01\_01 NUMBER OF PUBLICATIONS AVAILABLE IN OPEN ACCESS: (Required)

S01\_01 NUMBER OF PUBLICATIONS AVAILABLE IN IMMEDIATE OPEN ACCESS: (Required)

Where possible, enter exact figures. If exact numbers are not available, provide a well-founded estimate and indicate that the number is approximate in the comment field.

☒ INTRODUCTION
 ☒ ORGANISATION
 ☒ **3 QUESTIONNAIRE**
☐ 4 COMPLETE YOUR SUBMISSION

S03\_01 Does your Research Funding Organisation require data sharing and/or incentivise data re-use? (Required)

- ☐ Yes  
☐ No

S04\_02 Has your Research Infrastructure developed or adopted documented standards and protocols for data sharing and re-use? (Required)

- ☐ Yes  
☐ No

S07\_01 Does your Research/ Data Infrastructure have developed relevant data and/or services specifically aiming to be offered through EOSC? (Required)

- ☐ Yes  
☐ No

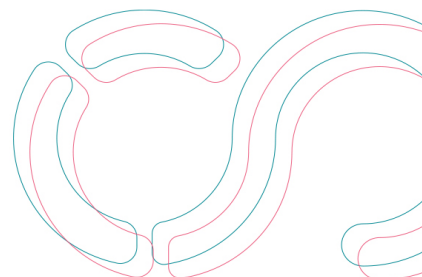
O05\_01 Has your organisation participated in developing components of a FAIR ecosystem, such as standards, schemas, APIs, metadata frameworks? (Required)

- ☐ Yes  
☐ No

## Feedback

At the bottom of the Questionnaire page, there is a text field for your feedback on the survey.

You are welcome to use this space to share any remarks, suggestions, or clarifications related to the survey content or your experience completing it.



**Note:** This field is optional and does not affect your ability to submit the survey.

Comments

Your feedback is valuable to us. If you have any additional comments or suggestions, please provide them in the space below (optional).

Previous

Next

Save and Continue Later

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### 3.3.1.1.4 Complete your submission

This is the final page of the survey. If you would like to make any changes, use the navigation menu or **“Previous”** button to return to previous sections. You can review and update your answers at any time before submitting.

If your input is complete and final, select the **“Submit”** button to officially record your responses.

Once submitted, no further edits can be made.

[Home](#) / 2026\_KPI\_SURVEY\_2 (1)

## 2026\_KPI\_SURVEY

✓ INTRODUCTION ✓ ORGANISATION ✓ QUESTIONNAIRE **4** COMPLETE YOUR SUBMISSION

You have **almost** completed the survey

After clicking ‘Submit’, you will no longer be able to modify your answers.

So, before proceeding:

- If you need to make any changes, please go back to the previous sections of the survey.
- If your responses are final, please go ahead and submit the survey.

Previous

Submit

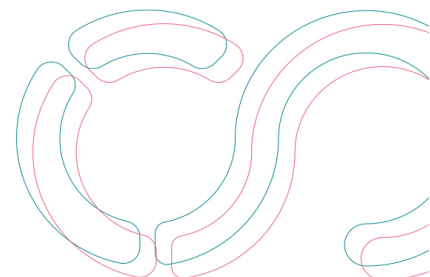
Save and Continue Later

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Export blank template to CSV

### 3.3.1.2 Survey submission

Select the **“Submit”** button to send your responses. You will find the submitted survey in the **“Submitted”** section of the **My Surveys** page under the **KPI section**.



## My Surveys

### Test User

Role in the EOSC Monitoring Tool:

Submitter(s)

Other registered members from your organisation:

- EOSC Monitoring Tool Home
- My Account
- User Guide
- Logout

Open surveys

In draft

Submitted

### AAP Reviewed

Form	User	Submitted	Category	PDF	CSV
AAP 2025 - Approved		18 Mar 2025 12:49:51	AAP Reviewed	<a href="#">Download PDF</a>	<a href="#">Download CSV</a>
AAP 2024 - Approved		10 Sept 2023 02:00:00	AAP Reviewed	<a href="#">Download PDF</a>	<a href="#">Download CSV</a>
AAP 2023 - Approved		18 Oct 2022 02:00:00	AAP Reviewed	<a href="#">Download PDF</a>	<a href="#">Download CSV</a>
AAP 2022 - Approved		18 Oct 2021 02:00:00	AAP Reviewed	<a href="#">Download PDF</a>	<a href="#">Download CSV</a>
AAP 2026		26 Nov 2025 23:24:30	AAP Reviewed	<a href="#">Download PDF</a>	<a href="#">Download CSV</a>

### AAR

Form	User	Submitted	Category	PDF	CSV
AAR 2023		10 Sept 2023 02:00:00	AAR	<a href="#">Download PDF</a>	<a href="#">Download CSV</a>
AAR 2022		18 Oct 2021 02:00:00	AAR	<a href="#">Download PDF</a>	<a href="#">Download CSV</a>
AAR 2024		27 Sept 2023 08:57:30	AAR	<a href="#">Download PDF</a>	<a href="#">Download CSV</a>

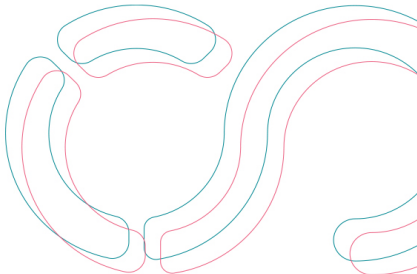
Trends Over the Years for AAP and AAR

### KPI

Form	User	Submitted	Category	PDF	CSV
2026_KPI_SURVEY_		28 Nov 2025 10:59:24	KPI	<a href="#">Download PDF</a>	<a href="#">Download CSV</a>

### 3.3.1.3 Review of submitted KPI Survey responses by the EOSC Association Monitoring Team

After submission, the EOSC Association Monitoring Team reviews each KPI survey. If any inconsistencies, missing data, or unclear answers are identified, the EOSC-A Team contacts the respondent to request clarifications or provide guidance on possible adjustments.



Following this interaction, any agreed updates are reflected in the “KPI Revised” record.

If no adjustments are needed, the “KPI Revised” value is equal to the originally submitted KPI.

The goal of this review is to ensure the accuracy, consistency, and comparability of data across all member organisations.

Following this internal review, the data is anonymised and shared with EOSC Association members and eossc.eu website visitors.

## 4 EOSC Monitoring Tool Frequently Asked Questions (FAQs)

### 4.1 General

#### 1. Can I return to a survey I started earlier?

Yes. Use the **“Save and Continue Later”** button located at the bottom of each survey page to save your work. You can return to it anytime by logging into your dashboard and accessing the [In Draft](#) section.

#### 2. Can multiple users from my organisation access and edit the same survey?

Yes. All authorised users registered to the tool from your organisation can access the same survey. Users with Editor or Submitter roles can access and collaborate on draft surveys, while users with the Viewer role can only view surveys and submissions and cannot make any changes. Please coordinate internally to avoid overwriting each other’s inputs.

#### 3. How can I update my user account information?

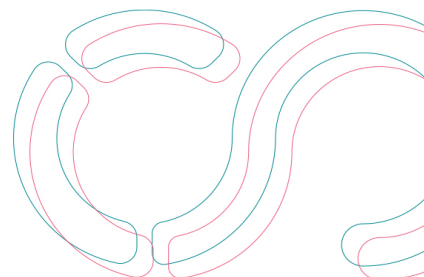
Sign in to the EOSC Monitoring Tool and go to My Account > Account Details. Here, you can update personal details such as first name, last name, job position, phone number, or EOSC-A role. Remember to re-accept the Privacy Policy after making changes.

#### 4. I forgot my password. How can I reset it?

Contact [monitoring@eossc.eu](mailto:monitoring@eossc.eu). The team will initiate a password reset process, and you will receive an email with a secure link to set a new password.

#### 5. Can I export a copy of the submitted survey?

Yes. Use the Download to PDF/CSV feature available in the [Submitted](#) section of **My Surveys** to download your answers. This is useful for internal archiving or review.



## 6. Who can I contact for help with technical issues or account setup?

Please contact the EOSC Association Monitoring Team at: [monitoring@eosc.eu](mailto:monitoring@eosc.eu). They will assist with technical support, user account requests, and any clarifications regarding the submission process.

## 7. How will my data be used?

The Privacy Policy states that any results shared externally will be anonymised. While most of the data shared externally will likely be in aggregated form, there may be cases involving individual examples. In that case, while the specific data can be made public, the data provider will not be revealed, not even at the level of name of the organisation.

## 8. Can I preview the full survey before submission?

Yes. The entire questionnaire is available in PDF and CSV formats and can be downloaded from the EOSC Monitoring Tool **My Surveys** under the *In draft* section, using "[Download PDF/CSV](#)" functionality.

## 4.2 AAP/AAR survey

### 1. Have all the members of the EOSC Association committed to contribute to additional activities?

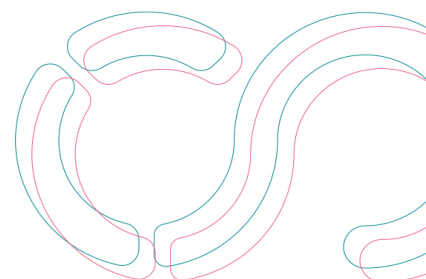
Yes, with the establishment of the co-programmed EOSC Partnership and the signing of the Memorandum of Understanding (MoU), the EOSC Association (=all the Members of the Association) has committed to provide additional activities of 500 million euro over the next ten years. According to the MoU, 'the Partners other than the Union' (= the Association and its constituent and affiliated entities) envisage to dedicate up to EUR 500 million for the period 2021-2030 in research, innovation and other activities in the area of the Co-programmed European Partnership, engaging their constituent and affiliated entities to make such investments.'

## 4.3 KPI survey

### 1. I'm not sure which organisation type to select. What should I do?

You should select all types that apply to your current role within the EOSC ecosystem. The organisation types you select will determine which questions appear in the survey. If in doubt, consult your institution's EOSC-A Delegate or contact the Monitoring Team at [monitoring@eosc.eu](mailto:monitoring@eosc.eu).

### 2. What happens after I submit the KPI survey?



Your submission will be reviewed individually by the EOSC Association Monitoring Team. If clarifications or corrections are needed, the team will contact you directly. Any agreed changes will be reflected in the “KPI Revised” version. If no changes are required, the submitted KPI and revised KPI will be the same.

