

European Union HORIZON 2020 PROGRAMME

# EOSC Portal Collaboration Agreement between

EOSC-hub / EOSC Enhance / OpenAIRE Advance - May-Dec 2020

Version 0.9, 21 May 2020

EOSC-hub, GA 777536

EOSC Enhance, GA 871160

OpenAIRE Advance GA 777541

This Collaboration Agreement ('the Agreement') is between the following parties:

- The beneficiaries of the Complementary Grant Agreement N. 777536 (Acronym: EOSC-hub, Full title: Integrating and Managing Services for the European Open Science Cloud) hereinafter the "EOSC-hub", represented by STICHTING EGI (EGI Foundation), established in SCIENCE PARK 140, AMSTERDAM 1098 XG, Netherlands (the EOSC-hub Coordinator), represented for the purposes of signing the Agreement by its Managing Director, Tiziana FERRARI.
- The beneficiaries of the Complementary Grant Agreement N. 871160 (Acronym: EOSC Enhance, Full title: Enhancing the EOSC portal and connecting thematic clouds) hereinafter the "EOSC Enhance", represented by the National and Kapodistrian University of Athens (UOA), established in Panepistimiopolis, Ilissia, Athens 15784 (the EOSC Enhance Coordinator), represented for the purposes of signing the Agreement by Prof. Michael Chatzopoulos.
- The beneficiaries of the Complementary Grant Agreement N. 777541 (Acronym: OpenAIRE-Advance, Full title: OpenAIRE Advancing Open Scholarship) hereinafter the "OpenAIRE-Advance", represented by National and Kapodistrian University of Athens (UoA), established in 1837, Greece (the OpenAIRE-Advance Coordinator), represented for the purpose of signing the Agreement by its coordinator Prof. Michael Chatzopoulos.

Hereinafter also referred to as "Parties", have agreed to enter into an Agreement under the terms and conditions below.

By signing the Agreement through their representatives, the Parties accept the Agreement and agree to implement it under their own responsibility and in accordance with the Agreement, with all the obligations and conditions it sets out.

The Agreement is composed of:

**Terms and Conditions**

- Article 1. Definitions
- Article 2. Purpose and Relationship with Consortium Agreements
- Article 3. Work Plan
- Article 4. Coordination and Communication
- Article 5. Rights of Access to Background
- Article 6. Confidentiality
- Article 7. Transfer and Licensing of Results
- Article 8. Access to Results
- Article 9. Non-Disclosure of Information
- Article 10. Dissemination and Publications
- Article 11. Intellectual Property Rights
- Article 12. Funding
- Article 13. Liabilities, Warranties and Penalties
- Article 14. Annexes
- Article 15. Language
- Article 16. Amendments
- Article 17. Applicable Law and Settlement of Disputes
- Article 18. Entry into Force, Term, Termination.

Annex 1. Joint Activity Plan

Annex 2. Background

Annex 3. Results

Annex 4. Party acronyms

## TERMS and CONDITIONS

### Article 1. Definitions

**Joint Activity Plan:** refers to activities to be jointly conducted by the Collaborating Grants and described in Annex 1 of this Agreement.

**EOSC:** the European Open Science Cloud promoted by the European Commission to provide all researchers, innovators, companies and citizens with seamless access to an open-by-default, efficient and cross-disciplinary environment for storing, accessing, reusing data, tools, publications and any *EOSC Resource* for research, innovation and educational purposes. The EOSC is implemented by the *EOSC System* and governed by the *EOSC Governance*.

**EOSC System:** the IT system implementing *EOSC*. Such a system is called to put in place the policies, procedures and technical solutions needed to enact the delivery of the EOSC Services in accordance with the EOSC Governance guidelines. Such a system is not a monolithic, stand-alone and centralised IT system. Rather the *EOSC System* is designed and developed to be a system of systems.

**EOSC Governance:** the set of committees and bodies governing the functioning of *EOSC* and its *EOSC System*. It includes the *EOSC Executive Board*, the *EOSC Board*, and the *EOSC Stakeholders Forum*.

**EOSC Portal** (hereinafter also referred to as the “Portal”): the EOSC service implementing a web portal facilitating the access to and use of the EOSC Resources. The EOSC Portal is the universal access channel through which all European researchers are able to access, use and reuse research outputs and data across disciplines. In the context of this collaboration agreement, we make reference to three current related sections of the EOSC Portal:

1. A section for **EOSC Providers** to register and join the Portal following the EOSC Onboarding Process (OP) and employing the EOSC Registry Description Templates (RDTs). It is also offered with dashboard tools for monitoring the usage of their Resource offerings and a rich collection of open REST API methods for the automatic provisioning and synchronisation of information between providers’ systems and the EOSC Portal as well as the provisioning of catalogue information towards third party systems to enable the development of added value services on top of it.
2. A section for the **EOSC End-Users** to discover the EOSC Resources with a multitude of functionalities. It allows users to browse all EOSC Resources, to search and filter specific ones based on multiple criteria, to compare EOSC Resources across several characteristics and personalize their experience, by providing feedback on EOSC Resources or adding them to their favourite list, etc.

3. A section for the **EOSC coordinating and contributing projects**, the **EOSC Governance**, the **EOSC Policy Framework**, **Best Practices and Use Cases**. It also acts as the reference point for News and Events related to EOSC and boosts the promotion of EOSC-related initiatives offering visibility opportunities to all the EOSC stakeholders. The informative part of the Portal is populated and maintained by the EOSC Portal Editorial Board.

**EOSC Resources:** any asset made available by means of the *EOSC system* and according to the *EOSC Rules of Participation* to *EOSC End-Users* to perform a process useful to deliver value in the context of the EOSC. *EOSC Resources* include Services, Data Sources, Research Products and any other asset.

**EOSC Registry:** an *EOSC Service* providing *EOSC System Users* with a list of live/ready-to-use descriptions of *EOSC Resources* and related information offered by the *EOSC System*. Every entry of the *EOSC Registry* must follow and be described and updated following the *EOSC Registry Description Specification*.

**EOSC Platform:** The collection of internal services and the the central EOSC Registry which services content to EOSC Portal and to other EOSC Registries or parts of the EOSC System,

**EOSC End-user:** an EOSC System User consuming Resources from the EOSC to accomplish a task. EOSC End-users can be Researchers, Research groups, Research communities, Research projects, Research networks, Research managers, Research organisations, Students, Innovators, Businesses, Funders, Policy Makers, etc.

**EOSC Provider:** an EOSC System User responsible for the provisioning of one or more Resources to the EOSC. EOSC Providers are organisations, a part of an organisation or a federation that manages and delivers Resources to End-Users. EOSC Providers can be: Resource Providers, Service Providers, Data (Source) Providers, Service Developers, Research Infrastructures, Distributes Research Infrastructures, Resource Aggregators, Thematic Clouds, Regional Clouds, etc.

**EOSC Interoperability Framework:** the framework that any *EOSC Resource* must comply with to be listed in the *EOSC Registry*. The framework includes the *EOSC Onboarding Process*, the *EOSC Rules of Participation*, the *EOSC Registry Description Specifications* and *Classifications* and the *EOSC Portal Application Programming Interfaces*. The framework also defines the workflows, the APIs, the formats, the legal framework, the SLA that similar Registries operated by research infrastructures or clusters must comply to in order to be aggregated by the corresponding EOSC Registries.

**EOSC Onboarding Process:** the process that an *EOSC Resource Provider* must follow to register the resource provider and their resources in the *EOSC Resource Registry*.

**EOSC Rules of Participation:** the principles defined by the *EOSC Governance* to drive the processes enacting an actor to play the role of *EOSC System User* (and any specialization of it).

**EOSC Registry Profile Specifications:** the standard scheme for the representation of resource-related information in the EOSC Resource Registry. The following typologies of the EOSC Resource Registry ProfileSpecification are currently envisaged: the EOSC Provider ProfileSpecification, the EOSC Resource Profile (with different subtypes for services, data sources and research products. .

**EOSC Registry Classifications:** structured classifications of various *EOSC Registry* attributes for their harmonized descriptions.

**EOSC Portal Application Programming Interfaces:** a set of standard APIs that allow for the registration, update, export of EOSC Resource descriptions from the EOSC Registry.

**Executive Office:** the governance structure responsible for organising the liaison between the Parties, monitoring the execution of the Joint Activity Plan and handling the escalation of issues.

**Results:** tangible or intangible output of the Agreement, such as data, knowledge or information, as well as any rights attached to it, including intellectual property rights. Results are listed in Annex 3.

## Article 2. Purpose and Relationship with Consortium Agreements

The purpose of this Agreement, which shall be implemented in accordance with the provisions of the applicable Grants, is:

- to define the rights and obligations of the Parties relating to their coordination and collaboration, and
- to implement the provisions of the respective Grant Agreements concerning amongst other things Access Rights relating to Results and Background.

Nothing in this Agreement shall be construed to prevent all Parties of one grant from agreeing (in the respective Consortium Agreement) to additional, supplementing or deviating Access Rights (including conditions thereof) or confidentiality obligations, provided that such obligations shall apply only to the beneficiaries of the applicable grant and their participation in the respective Grant. It is further understood that in the event of a conflict, the terms and conditions of the Consortium Agreement of the Grants shall prevail over the terms and conditions of this Agreement, but only with respect to and among the Parties.

The Parties wish to express their commitment to support the continued operations and further development of the Portal in a manner that acknowledges and maximally leverages the contributions made by the Parties, and at the same time clarifies the ownership of the results in a way that streamlines the future governance and strategic decision making of the activities.

To reach the goals listed above, the Parties have agreed to the following:

- Executing the attached joint action plan [Annex 1 of the Agreement].
- Confirming that - to the best of their knowledge - the list of Background [Annex 2] and Results [Annex 3] represents a first list of components needed to operate and further develop the Portal. In case Parties consensually identify additional or modified Background items, the signatories agree that the Annex 2 will be updated accordingly. Finally, the signatories confirm that the relative contributions and percentage of ownership of the results represents a consensus opinion of all the stakeholders involved.
- Confirming that all the Parties agree to the spirit of this Agreement and their willingness to refine the working version into a formal agreement that will - as soon as possible - grant or transfer the necessary rights to the background and results to a legal entity that will take the responsibility of the further development, improvement and provisioning of the Portal. It is assumed that the identity of this legal entity will be communicated to the Parties during 2020. The Parties will review the situation in September 2020 and update this Agreement and the Joint Action Plan if needed.

## Article 3. Work Plan

The Parties contribute to enable the vision of the EOSC by providing a Portal as an access and delivery channel to EOSC Resources. It shall also act as a connection point between the various registries in the EOSC landscape and facilitate cross-exposure of resources between them.

The specific activities to be carried out in the framework of the collaboration are defined in Annex 1 of this Collaboration Agreement.

## Article 4. Coordination and Communication

The execution of the Joint Activity Plan is the responsibility of the Executive Office (Article 4.1).

### **4.1 Executive Office**

The execution of the Joint Activity plan (Annex 1) will be jointly coordinated by the Executive Office, the governance structure responsible for organizing the liaison between the Parties for managing the alignment of activities to this Agreement.

Composition. The Executive Office will include two representatives of the Grants involved in this Agreement.

Capacity: The Executive Office oversees the effectiveness of the scientific and technical coordination of the collaboration.

Meetings: Meetings of the Cross-project Executive Office are held once per month.

#### **4.2 Coordination**

Each task of the Joint Activity Plan, is coordinated by an appointed person named in the Joint Activity Plan.

#### **4.3 Communication**

The Parties shall keep each other informed on their respective activities and on their progress and shall consult regularly on areas offering potential for further cooperation.

#### **4.4 Consultation**

Where relevant for issues concerning the ongoing operation and short-term (until December 2020) development of the EOSC Portal, the parties will seek advice from relevant EOSC Working Groups<sup>1</sup>. Any issues that cannot be solved by the members of each Joint Activity will be escalated to the Executive Office for a final decision.

## **Article 5. Rights of Access to Background**

In case a Party or its Affiliated Entity requests Access Rights to Background Information, the granting of such Access Rights shall be at the discretion of the owning Party and subject to written agreement. Background is defined in Annex 2.

## **Article 6. Confidentiality**

All information in whatever form or mode of communication, which is disclosed by a Party (the “Disclosing Party”) to any other Party (the “Recipient”) in connection with the Joint Activity Plan during its implementation, and which has been explicitly marked as “confidential” at the time of disclosure, or when disclosed orally has been identified as confidential at the time of disclosure and has been confirmed and designated in writing within fifteen (15) calendar days from oral disclosure at the latest as confidential information by the Disclosing Party, is “Confidential Information”.

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<sup>1</sup> <https://www.eoscsecretariat.eu/eosc-working-groups>



Confidential Information will neither be used, duplicated in whole or in part by the receiving Party for any purpose other than the implementation of this Agreement, unless there is an explicit written agreement permitting use agreed separately.

Each Party shall take reasonable precautions to prevent disclosure of the other Parties' Confidential Information to other persons than those who have needed to know for the purpose of this Agreement and shall ensure that such persons shall be bound by the provisions of this Agreement. Any release of Confidential Information, when considered necessary, to any person other than the Parties shall be approved in writing by the disclosing Party.

Any Confidential Information disclosed by one Party to the other shall remain the property of the disclosing Party and the receiving Party shall upon request of the disclosing Party, or as soon as the purpose of disclosure is achieved, or in case of termination of this Agreement, either return any Confidential Information to the disclosing Party or certify in writing the disclosing Party that such Confidential Information has been destroyed.

The above obligations with respect to using Confidential Information are not applicable if the receiving Party can demonstrate:

- The information has come into public domain prior to, or after, the disclosure
- Was already in possession of the receiving Party without any obligation of confidentiality.
- Has been published without violation of this Collaboration Agreement.
- Is approved for release or use by written authorization of the disclosing Party.

## Article 7. Transfer and Licensing of Results

As a general principle, the parties agree that the goal of this collaboration is to ensure the availability of key components of EOSC to the long term, sustainable structure of EOSC. This is likely to include a legal entity which is created or delegated as a vehicle to maintain sustainable operation. The parties intend, within the legal and contractual limitations below and in their Grant and Consortium Agreements, to ensure this future vehicle has access to, and where appropriate, ownership of key EOSC assets. The parties of this collaboration will act to ensure this outcome.

### (1) Transfer of ownership

Each Party may transfer ownership of its results. It must however ensure that its obligations under Articles 26.2, 26.4, 27, 28, 29, 30 and 31 of the Grant Agreements of the Grants participating in this Agreement, also apply to the new owner and that this owner has the obligation to pass them on in any subsequent transfer.

A Party that intends to transfer ownership of results must give at least 45 days advance notice (or less if agreed in writing) to the other Parties that still have (or still may request) access rights

to the results. This notification must include sufficient information on the new owner to enable any Party concerned to assess the effects on its access rights.

Unless agreed otherwise (in writing) for specifically-identified third parties, any other Party may object within 30 days of receiving notification (or less if agreed in writing), if it can show that the transfer would adversely affect its access rights. In this case, the transfer may not take place until agreement has been reached between the beneficiaries concerned.

## (2) Granting licenses

Each Party may grant licences to its results (or otherwise give the right to exploit them), if:

- (a) this does not impede the access rights under Article 31 of the Grant Agreements of the participating Grants, and
- (b) not applicable.

In addition to Points (a) and (b), exclusive licences for results may be granted only if all the other Parties concerned have waived their access rights.

## (3) Right to object to transfers or licensing

The Commission may — up to four years after the termination of this Agreement — object to a transfer of ownership or the exclusive licensing of results, if:

- (a) it is to a third party established in a non-EU country not associated with Horizon 2020 and
- (b) the Commission considers that the transfer or licence is not in line with EU interests regarding competitiveness or is inconsistent with ethical principles or security considerations.

A party that intends to transfer ownership or grant an exclusive licence must formally notify the Commission before the intended transfer or licensing takes place and:

- identify the specific results concerned;
- describe in detail the new owner or licensee and the planned or potential exploitation of the results, and
- include a reasoned assessment of the likely impact of the transfer or licence on EU competitiveness and its consistency with ethical principles and security considerations.

The Commission may request additional information.

If the Commission decides to object to a transfer or exclusive licence, it must formally notify the beneficiary concerned within 60 days of receiving notification (or any additional information it has requested).

No transfer or licensing may take place in the following cases:

- pending the Commission decision, within the period set out above;
- if the Commission objects;
- until the conditions are complied with, if the Commission objection comes with conditions.

## Article 8. Access to Results

Results are defined in Annex 3.

### (1) Access Rights for Exploitation

Access Rights to Results if needed for Exploitation of a Party's own Results including for research on behalf of a third party shall be granted on Fair and Reasonable Conditions. A request for Access Rights may be made up to twelve months after the end of this Agreement.

### (2) Additional Access Rights

For the avoidance of doubt any grant of Access Rights not covered by the Grant Agreement or this Agreement shall be at the absolute discretion of the owning Party and subject to such terms and conditions as may be agreed between the owning and receiving Parties.

### (3) Access to Software

Access Rights to Software, which is Results shall comprise:

- The software code, tools and interfaces developed as part of this Agreement released as open source code will be provided via source code repositories such as, but not limited to GitHub or Source Forge.
- Access to the Object Code; and, where normal use of such an Object Code requires an Application Programming Interface (hereafter API), Access to the Object Code and such an API; and, if a Party can show that the execution of its tasks under this Agreement or the Exploitation of its own Results is technically or legally impossible without Access to the Source Code, Access to the Source Code to the extent necessary.

## Article 9. Non-Disclosure of Information

In the context of the Joint Activity Plan and the Grants, each Party will indicate the dissemination level of written outputs and Results, as follows:

- Public fully open (PU) or
- Confidential (CO) restricted under conditions, as described in the MGA, only available internally to a group of Recipients within the Complementary Grant consortia. Confidential deliverables, milestones and Results provide information about the Disclosing Party and the intended group of Recipients.

Release of CO written outputs and results, to parties other than the indicated group of Recipients, is upon request and requires the approval of the Executive Office and of the Disclosing Parties.

For activities where confidential or restricted information from one project is shared with the others, there is an understanding that such information will only be used for its intended

purpose, and will not be shared outside of the collaboration. This is of particular importance for information from resource providers submitted to one project as part of the onboarding, but that both need to access in the context of a unified onboarding process.

## Article 10. Dissemination and Publications

The Parties acknowledge their obligations taken by their Grant Agreements and by the Joint Activity Plan to disseminate their results, and the task to support and promote the coherent and coordinated dissemination of information on activities such as joint events and workshops.

The Parties shall support efforts by providing relevant inputs and ensuring attendance at events. No Party is allowed to publish or allow the publishing of the other Party's data that constitute Results, Background or Confidential Information unless the owner Party agrees to the publication.

## Article 11. Intellectual Property Rights

### Exploitation and Dissemination of Results

The Parties give each other — under fair and reasonable conditions — access to the Results of this Agreement needed for exploiting their own results.

### Ownership of Results

Results are owned by the Parties that generate them as defined in Annex 3.

### Copyright

Documentation and interoperability guidelines and other similar, supporting results of the Joint Activity Plan will be released under the following copyright note:

“This material is licensed under a [Creative Commons Attribution 4.0 International License](#) by <list of owning Parties>.

Acknowledgement should be visible at the portals and source code public repositories:

“The <name of the Result> is provided by <name of the providing Party>, and co-funded by <list of the funding Parties or Grants>.”

### Software

In order to comply with the open access policy and maximise possibility for reuse of results, software code, tools and interfaces developed in the Joint Activity Plan of this Agreement will be published under Apache Software License 2.0 or other OSI compliant license. If the license chosen imposes obligations beyond acknowledging the use of the results (as is the case of so called “copyleft” licenses), the IP owner will ensure that they are able to provide an alternative license if needed to comply with the Article 8 clause (1) of this agreement. Software components where the obligations stemming from the background IP prevent this approach should be highlighted in the risk management activity of the collaboration.

## Article 12. Funding

Each Party shall bear the costs of discharging its respective responsibilities under this Agreement, including travel and subsistence of its own personnel and transportation of goods and equipment and associated documentation, unless otherwise defined in this Agreement.

The Parties' obligations hereunder are subject to their respective funding procedures and the availability of appropriated funds. Should either Party encounter budgetary problems in the course of its respective internal procedures that may affect the activities carried out under this Agreement, the Party shall notify and consult with the other Party in a timely manner in order to minimise the negative impact of such problems on the cooperation. The Parties shall jointly look for mutually agreeable solutions.

In order to reduce the impact on travel costs, face-to-face meetings should be co-located with other events where participants are likely to attend. Meeting via teleconferences should be considered when the nature of the discussion does not strictly require a face-to-face presence.

## Article 13. Liability, Warranties and Penalties

Each Party agrees to a cross waiver of liability pursuant to which each Party waives all claims and shall take no recourse against the other Party, or the other Party's employees based on damage arising out of the implementation of this Agreement.

This waiver of liability shall not be applicable to:

- Claims for damage caused by willful misconduct or gross negligence.
- Intellectual property claims.

Subject to the specific undertakings provided by this Agreement, each Party shall be solely liable for any loss, damage or injury to third parties under this Agreement.

## Article 14. Annexes

Annexes are an integral part of the Agreement. Rights and obligations accepted by the Parties, are applicable to them.

Annexes are amended following the provisions of Article 16.

## Article 15. Language

The language for this Agreement, its interpretation and all cooperative activities foreseen for its implementation, is English.

## Article 16. Amendments

All amendments or changes of this Agreement shall be valid only if made in writing and signed by an authorised signatory of each of the Parties.

## Article 17. Applicable Law and Settlement of Disputes

Given the scope of the collaboration, we do not foresee any areas of structural dispute. However, any dispute, controversy or claim arising under, out of or relating to this Agreement and any subsequent amendments of this Agreement, including, without limitation, its formation, validity, binding effect, interpretation, performance, breach or termination, as well as non-contractual claims, shall be submitted to mediation in accordance with the WIPO Mediation Rules. The place of mediation shall be Brussels unless otherwise agreed upon. The language to be used in the mediation shall be English unless otherwise agreed upon. The Parties undertake not to put an end to the mediation before the introductory statement made by each Party in joint session.

Should the mediation fail to bring about a full agreement between the Parties putting an end to the dispute, the courts of Brussels shall have exclusive jurisdiction, except for any disputes involving intergovernmental organisations.

Should the dispute involve an intergovernmental organization, the Parties shall resolve the dispute, upon the filing of a Request for Arbitration by either Party, be referred to and finally determined by arbitration in accordance with the WIPO Expedited Arbitration Rules. The place of arbitration shall be Brussels unless otherwise agreed upon. The language to be used in the arbitral proceedings shall be English unless otherwise agreed upon. The award of the arbitration will be final and binding upon the Parties. The enforcement of the award of such arbitration shall be governed in accordance with the rules in force in the State in which it is to be executed.

## Article 18. Entry into Force, Term, Termination

This Agreement entered into force on 01 June 2020 though describes some steps already taken prior to this while this document was prepared. The Agreement shall remain in force until 31 December 2020 or until the end of the period where all projects remain active (if for instance, or or more of them are extended) . The agreement can be terminated upon three (3) months prior written notice by one Party to the others. In the event of termination, the parties shall endeavour to reach agreement on terms and conditions to minimise negative impacts on the other Party. In the event of the continuation of the present cooperation, the Agreement may be extended and/or amended by mutual agreement in writing.

IN WITNESS WHEREOF, the Parties have caused their duly authorised representatives to sign this Agreement, in the English language. The following agree to the terms and conditions of this Agreement:

**SIGNATURES**

**For the EOSC-hub Coordinator**

DocuSigned by:  
*Tiziana Ferrari* Sep 3, 2020 | 13:34 CEST  
465881FE0D144C8...

Tiziana Ferrari

Director,  
EGI Foundation

**For the Enhance Coordinator**

DocuSigned by:  
*Mike Chatzopoulos* Sep 3, 2020 | 03:24 PDT  
8B2F761A061C485...

Prof. Michael Chatzopoulos

Professor,  
University of Athens

**For the OpenAIRE-Advance Coordinator**

DocuSigned by:  
*Mike Chatzopoulos* Sep 3, 2020 | 03:24 PDT  
8B2F761A061C485...

Prof. Michael Chatzopoulos

Professor,  
University of Athens



# Annex 1. Joint Activity Plan

Acronyms of Parties involved in the Joint Activity Plan are defined in Annex 4.

## Summary of activities

- Data models and processes for EOSC Resources
- Technical development of demand side components
- Technical development of supply side and operator side component
- Operation of the onboarding process
- Communication and stakeholder engagement
- EOSC Portal Metrics

Bolded names are those responsible from EH and Enhance sides.

## Joint Activity 0: Collaboration platforms

<b>JA0</b>	Collaboration platforms		
<b>Period</b>	May - December 2020		
<b>Purpose</b>	Provide platforms and tools for the interaction of the projects on overlapping activities.		
<b>Outputs / end state</b>	Working ticketing systems for tracking shared activity items, specifically: Onboarding tickets, New requirements' tickets, Bug fixing tickets, etc Working wiki for documenting shared activities and for sharing information with the EOSC community publicly.		
<b>Effort</b>	<b>EOSC Enhance</b>	<b>EOSC-Hub</b>	<b>OpenAIRE Advance</b>
	0.5 pm	0.5 pm	0
<b>Involved staff</b>	<b>Jorge Sanchez</b> Yannis Mitsos	<b>Owen Appleton</b> Małgorzata Krakowian	
<b>Suggested Deadlines</b>	<b>Date</b>	<b>Description</b>	
	May 2020	Ticketing for tracking new requirements	

		Ticketing for development and bug fixes Ticketing for specifications Wiki for sharing project information and documentation
	June 2020	Ticketing for tracking onboarding and Providers' backend coordinated Wiki for public information (providers and users) & consultation - branded as EOSC
	November	Plan to transit these to Enhance/INFRAEOSC03

## Joint Activity 1: Profiles and processes for EOSC registries

<b>JA1</b>	Profiles and processes for EOSC registries		
<b>Period</b>	May- December 2020		
<b>Purpose</b>	Provide unified specifications of profiles and processes for the EOSC Portal.		
<b>Outputs / end state</b>	EOSC registry Onboarding Process EOSC Provider and Resource profiles EOSC Portal Application Programming Interfaces		
<b>Effort</b>	<b>EOSC Enhance</b>	<b>EOSC-Hub</b>	<b>OpenAIRE Advance</b>
	3 pm	3pm	2pm

<b>Involved staff</b>	<b>Jorge Sanchez</b> George Papastefanatos Michelle Williams	<b>Owen Appleton</b> Mark van de Sanden Pavel Weber	Paolo Manghi Andrea Mannocci
<b>Suggested Deadlines</b>	<b>Date</b>	<b>Description</b>	
	May 2020	Specification of EOSC registry Onboarding Process version 3.0	
	May 2020	Specifications of EOSC Provider Profile and EOSC Resource Profile specifications v3.0	
	May 2020	Placement of Metadata on Onboarding UX/UI (Provider and Onboarding Team) v3.0	
	June 2020	Placement of Metadata on End-User UX/UI v3.0	
	July 2020	Extension of Resource Profile for Research Products (v3.1)	
	September 2020	Extension of Resource profile for Data Sources (v3.2)	
	October 2020	Specification of EOSC Portal Application Programming Interfaces v3.0	
	December 2020	Update of all the above to v4.00	

## Joint Activity 2: Technical development of EOSC Portal Registry and EOSC Portal provider component

<b>JA2</b>	Technical development of EOSC Resource Registry and EOSC Portal provider component		
<b>Period</b>	May- December 2020		
<b>Purpose</b>	To coordinate architecture design and technical development of the EOSC Registry and Provider components at EOSC Portal in Enhance with those in EOSC-hub		
<b>Outputs / end state</b>	EOSC Portal Architecture: overall architecture integrating EOSC-Enhance and EOSC-hub components EOSC Registry EOSC Provider components: statistics, monitoring, accounting, order management, helpdesk, AAI EOSC Portal Application Programming Interfaces		
<b>Effort</b>	<b>EOSC Enhance</b>	<b>EOSC-Hub</b>	<b>OpenAIRE Advance</b>
	4 pm	6 pm	3pm
<b>Involved staff</b>	<b>George Papastefanatos</b> Jorge Sanchez	<b>Bartosz Wilk</b> Matt Viljoen, Pavel Weber, Diego Scardaci	Paolo Manghi Alessia Bardi Andrea Mannocci-
<b>Suggested Deadlines</b>	<b>Date</b>	<b>Description</b>	
	May 2020	Clarify communication between EOSC-hub components ( statistics, monitoring, accounting, order management, helpdesk, AAI) and portal components. Requirements & Technical specifications of components that EOSC-hub will provide for EOSC portal provider's functionality (onboarding, statistics,	

		monitoring, accounting, order management, helpdesk, AAI).	
	May 2020	EOSC Portal Architecture updated with EOSC-Enhance and EOSC-hub components integrated	-
	May 2020	EOSC Registry Transition to v3.0 EIC(v1.13 to v3.0) MP (v1.3 to v3.0)	-
	June 2020	Integration of EOSC-hub monitoring with the EOSC Portal	
	May 2020	Single Onboarding mechanism (support onboarding without use of EOSC-hub Jira)	-
	July 2020	Providers' Onboarding implements v3.0	Requirements on how to integrate OpenAIRE Research Graph APIs to offer catalogue of research products-
	October 2020	EOSC Portal Application Programming Interfaces v3.0 (with emphasis on API for onboarding from Providers)	Requirements on how to integrate OpenAIRE PROVIDE to validate Data Source content-
	October 2020	Integration of the EOSC-hub accounting into the EOSC Portal	
	October 2020	Improved releases on the EOSC-hub components: statistics, monitoring, order	

		management, helpdesk, AAI	
	December 2020	Communication of providers component with other services from EOSC-hub (onboarding, statistics, monitoring, accounting, order management, helpdesk, AAI)	-

## JA3 Technical development of demand side components

<b>JA3</b>	Technical development of demand side components		
<b>Period</b>	April - December 2020		
<b>Purpose</b>	Coordinated development of the demand side components between the two projects.		
<b>Outputs / end state</b>	EOSC Portal demand side components implementation EOSC Portal demand side components deployment procedures implementation Training in demand side of EOSC Portal		
<b>Effort</b>	<b>EOSC Enhance</b>	<b>EOSC-Hub</b>	<b>OpenAIRE Advance</b>
	2 PM	4 PM	2pm
<b>Involved staff</b>	<b>Bartosz Wilk</b> , Rob Carrillo	<b>Pavel Weber</b> , Agnieszka Pułapa, Giuseppe La Rocca	Paolo Manghi Alessia Bardi Andrea Mannocci
<b>Suggested Deadlines</b>	<b>Date</b>	<b>Description</b>	
	May 2020	Implementation of Continuous Integration and Deployment procedures for the demand side of EOSC Portal components delivered by EOSC -hub.	
	June 2020	Development plan for the demand side components detailing a single development plan but indicating which project pays for which feature or otherwise how funding is used.	
	November 2020	Training in how to use the demand side available. Input from OpenAIRE on how to represent research products and data sources to the demand side	
	December 2020	Final requirements set for the demand side with input from EOSC-hub	

	December 2020	Release of the final milestone for implementation of EOSC Portal demand side in scope of Collaboration Agreement
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## JA4 Connecting resources to EOSC

<b>JA4</b>	Operation of the onboarding process		
<b>Period</b>	April - December 2020		
<b>Purpose</b>	Operate a unified onboarding process for the EOSC Portal.		
<b>Outputs / end state</b>	Updated list of EOSC Portal Registry/Catalogue		
<b>Effort</b>	<b>EOSC Enhance</b>	<b>EOSC-Hub</b>	<b>OpenAIRE Advance</b>
	2 pm	6 pm	2 pm
<b>Involved staff</b>	<b>Jorge Sanchez</b> Antonis Zervas George Papastefanatos	<b>Owen Appleton</b> Mark van de Sanden Pavel Weber	Paolo Manghi Alessia Bardi Andrea Mannocci Antonis Lempesis
<b>Suggested Deadlines</b>	<b>Date</b>	<b>Description</b>	
	June 2020	Migration of EOSC Registry to v3.0	
	July 2020 - August 2020	Update of existing records with providers to have coherent 3.0 data set. Campaign for providers.	
	July 2020 - December 2020	Operate intermediate unified onboarding process to the EOSC Portal, supporting Providers in filling in and validating their entries. Based on provider portal plus EOSC hub jira based workflow management. -	
	October 2020 - December 2020	Test/pilot onboarding via the API from other catalogues and validating their entries -	



	December	Pilot procedures for onboarding research products and data sources as an extension to existing procedures (PROVIDE, T4.4).
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## JA5 Communications, engagement and metrics

<b>JA5</b>	Communications, engagement and metrics		
<b>Period</b>	April - December 2020		
<b>Purpose</b>	Coordinated communications and engagement activities and sharing of portal metrics tracking responsibilities		
<b>Outputs / end state</b>	Regularly updated EOSC Portal content component section and monthly portal metrics reports. Periodic review of suggestions for improvement through portal feedback.		
<b>Effort</b>	<b>EOSC Enhance</b>	<b>EOSC-Hub</b>	<b>OpenAIRE Advance</b>
	2 pm	2 pm	2 pm
<b>Involved staff</b>	<b>Rob Carrillo</b> Leonardo Marino	Diego Simoni <b>Sara Garavelli</b> Małgorzata Krakowian	Paolo Manghi Alessia Bardi Andrea Mannocci Antonis Lempesis
<b>Suggested Deadlines</b>	<b>Date</b>	<b>Description</b>	
	April - December 2020	Representation and active participation in the EOSC Portal Editorial Board and Ensuring that all announcements, social posts, press releases or news or blog articles relating to the technical development of the EOSC Portal are agreed by all the EOSC Portal Editorial Board Members before publication	
	April - December 2020	Exchanging information on relevant events and	

		active exploration of potential joint event participation activities including but not limited to: <ul style="list-style-type: none"> <li>● Exhibition booths</li> <li>● Workshops</li> <li>● Webinars</li> </ul>
	November 2020	Development and display of service and resource provider and user training in the EOSC Portal -
	April - December 2020	EOSC-hub and EOSC Enhance will share the responsibility of tracking and reporting of the EOSC Portal metrics

## Annex 2. Background

Background	Generating Party and % of Ownership <sup>2</sup>	Joint Activity JA1: Operations JA2: Interoperability JA3: Technical Integration JA4: Content Provisioning	Protection <sup>3</sup>
Marketplace software <a href="https://github.com/cyfronet-fid/marketplace">https://github.com/cyfronet-fid/marketplace</a>	CYFRONET (85%) and EGI Foundation (15%)	JA3	GNU General Public License
Marketplace IT infrastructure	CYFRONET (100%)	JA1	Not applicable
eInfraCentral Catalogue software <a href="https://github.com/eInfraCentral/eic">https://github.com/eInfraCentral/eic</a>	UoA	JA3	Apache 2.0 License
eInfraCentral APIs specifications	UoA (80%), JNP (20%)	JA3	Creative Commons Attribution 4.0
eInfraCentral IT	UoA	JA3	Not applicable

<sup>2</sup> See Annex 4 for the party acronyms.

<sup>3</sup> Protection is defined as per ARTICLE 27 of participating project Grant Agreements.

infrastructure			
EOSC Portal domain name Dissemination date: Nov 2018	EFIS (100%)	JA1	Contract with register
Drupal <a href="https://eosc-portal.eu/">https://eosc-portal.eu/</a>	CYFRONET (100%)	JA1	Not applicable
Website content <a href="https://eosc-portal.eu/">https://eosc-portal.eu/</a>	TRUST-IT (20%), EGI.eu (20%), UGOE (20%), ARC (20%), EFIS (20%)	JA4	Possible copyright protection and potential sui generis database right <sup>4</sup>
EOSC Logo	EFIS (100%)	JA4	Copyright. Possible trademark for the EOSC (acronym), European Open Science cloud (name) and logo
SDT <a href="https://github.com/eInfraCentral/docs">https://github.com/eInfraCentral/docs</a>	JNP (60%), EGI.eu (10%), GEANT (10%), SURFsara (10%), UoA (10%),	JA3	Creative Commons Attribution 4.0
Resource/Service/Assets Classifications	JNP (55%), EGI.eu (15%), SurfSARA (15%), UoA (15%)	JA2	Creative Commons Attribution 4.0
eInfraCentral Service metadata <a href="https://catalogue.eosc-portal.eu/">https://catalogue.eosc-portal.eu/</a>	JNP (50%), UoA (50%)	JA1	Possible copyright protection and potential sui generis database right
Marketplace Service metadata <a href="https://marketplace.eosc-portal.eu/">https://marketplace.eosc-portal.eu/</a>	CYFRONET (100%)	JA1	Possible copyright protection and potential sui generis database right
Service Management System (Service Portfolio Management,	CINECA (15%), EGI.eu (30%), INFN (15%), CINES (15%),	JA1	Creative Commons Attribution 4.0

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<http://www.iprhelphdesk.eu/sites/default/files/newsdocuments/CS-Taking-steps-to-the-protection-of-databases.pdf>

Order Management)	MPG (15%), VUB (15%)		
Helpdesk <a href="https://helpdesk.eosc-hub.eu/">https://helpdesk.eosc-hub.eu/</a>	KIT (100%)	JA1	Not applicable
1st level support team (initial support to users and service providers)	CINECA (10%), JNP (20%) EGI.eu (30%), INFN (10%), CINES (10%), MPG (10%), VUB (10%)	JA1	Not applicable
2nd level support team (technical support about online platform)	CYFRONET, UoA	JA1	Not applicable
EOSC Portal AAI <a href="https://eosc-portal.eu/login">https://eosc-portal.eu/login</a>	GRNET (85%), EGI.eu (15%)	JA3	Not applicable
AGORA Software <a href="https://github.com/grnet/agora-sp-admin">https://github.com/grnet/agora-sp-admin</a>	GRNET (100%)	JA3	Apache Software License 2.0
Monitoring IT infrastructure <a href="https://github.com/ARGOeu/ARGO">https://github.com/ARGOeu/ARGO</a>	GRNET (30%), SRCE (27%), CNRS (27%), EGI.eu (16%)	JA1	Apache Software License 2.0
Accounting IT infrastructure <a href="https://github.com/apel">https://github.com/apel</a>	CESGA (42.5%), STFC (42.5%), EGI.eu (15%)	JA1	Apache Software License 2.0
SOMBO - Order Management	CNRS (75), EGI.eu (15%), CYFRONET (10%)		

## Annex 3. Results

<b>Result / Dissemination</b>	<b>Generating Party and % of Ownership<sup>5</sup></b>	<b>Protection</b>
EOSC Portal interoperability guidelines, documentation, EOSC portal glossary and architecture Dissemination: QR3-4 2019	ARC (16,66%), CNR (16,66%), EGI.eu (16,67%), JNP (16,67%), SURFsara (16,67%), UoA (16,67%)	Creative Commons Attribution 4.0
EOSC Portal Website design, EOSC portal brand, content and service metadata Dissemination date: QR2 2019. Result is continually updated during the collaboration	TRUST-IT (14,32%), EGI.eu (14,28%), UGOE (14,28%), ARC (14,28%), EFIS (14,28%), JNP (14,28%), UoA (14,28%)	Copyright (visual identity of website), and possible trademark for the EOSC (acronym), European Open Science cloud (name) and logo
EOSC Portal domain name Dissemination date: Nov 2018	EFIS (100%)	Contract with register
EOSC Portal service Dissemination date: QR2 2019. Result is continually updated during the collaboration	CYFRONET (50%), UoA (50%)	Not applicable
EOSC Portal software Dissemination date: QR4 2019	CYFRONET (50%), UoA (50%)	OSI compliant license

The Results table will be reviewed and updated continuously as necessary, with the final version to be agreed upon one month prior to the termination of the Agreement.

<sup>5</sup> See Annex 4 for the party acronyms.

## Annex 4. Party Acronyms

ARC	Athena Research and Innovation Centre
CESGA	Centro de Supercomputación de la Galicia
CINECA	Cineca Consorzio Interuniversitario
CINES	National Computing Center for Higher Education - CINES
CNR	Consiglio Nazionale delle Ricerche
CNRS	Centre national de la recherche scientifique
CYFRONET	ACK Cyfronet AGH
EGI.eu	EGI Foundation
EFIS	EFIS Centre
GÉANT	GÉANT Association
GRNET	Gnet
INFN	Istituto Nazionale di Fisica Nucleare
KIT	Karlsruhe Institute of Technology
JNP	JNP Strategy and Management Consulting PCC
MPG	Max Planck Society
SRCE	Sveučilišni računski centar
STFC	Science and Technology Facilities Council
SURFSara	SURFSara, Netherlands
TRUST-IT	Trust-IT Services Ltd.
UGOE	Georg-August University of Göttingen
UoA	National and Kapodistrian University of Athens
VUB	Vrije Universiteit Brussel

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