TF RoP/CM session
EOSC Symposium 2022
• Elaborated RoP: Introduction and Key concepts
• Rules of Participation for different stakeholder groups: Catalogues, Resource providers, Users. Inclusion criteria and gap analysis.
• Process for the elaborated RoP
Introduction to the TF

Composition and terms

• TF consists of 21 experts and 2 co-chairs
• Board Liaison has been appointed from the EOSC Association
• Ex-officio members of EOSC-A team attend the meetings
• TF started work in 2021
• Re-start in spring 2022
• Charter ends in April 2023 (2Y charter)
  • Timeline of work requires extension at least until the end of 2023
  • Support framework timing
  • Synchronization with EOSC-Focus
Introduction to the TF

Aims of the TF

- To ensure the bridge from principles to more practical criteria
- Define at what level requirements can be reasonably monitored
- Set in place the framework for monitoring
- Draw in community involvement
- Propose a durable structure that can continue after the TF concludes
Elaborated RoP
Introduction and Key concepts
Architecture of the EOSC RoP

Guiding principles (Current RoP)
High level umbrella for all and everything in EOSC

Evaluation of EOSC actors
Inclusion criteria

Monitoring framework
Remits and responsibilities
Architecture of the EOSC RoP

Ensure the scalability of the framework of rules, inclusion criteria, and monitoring

What does it mean to participate?

Organization is findable in the EOSC

Value of participation

Resource is findable in the EOSC

Integration with the EOSC Core

Integration with other services

Catalogue Providers

Providers

Users

Other?

Resource

Services

Resources

Catalogues

Inclusion criteria

EOSC Association

TF-RoP

EOSC Profiles

EOSC Operator

EPOT

EOSC Interoperability Framework

Core service operators

EIF record owners

Principles of current RoP

TF-RoP
Elaborated RoP

Approach

Guiding principles (Current RoP)

“Deconstructed RoP” predicates

- Propose inclusion criteria
- Identify gaps

Participation in EOSC

- EOSC Actors: Catalogue owners, Resource providers, Users
- EOSC “levels” of participation: Catalogue onboarding, resource onboarding, resource use, integration

Elaborated RoP

Monitoring framework
Discussion
Inclusion criteria and gap analysis:
Catalogues
Resource providers
Users
Practical and usable RoP

What do I need to do to become a...? What happens, when I do?

Assumption: Rules of Participation should support and be a tangible reflection of EOSC principles:
1. Multi-stakeholderism
2. Openness
3. FAIR (trust and quality)
4. Federation of Infrastructures
5. Machine-actionable
Practical and usable RoP

What do I need to do to become a...? What happens, when I do?

**Resource provider**

**Resource users**

**Catalogues**

**Different contexts:**
- provider of what?
- provider from where?
- for whom is it important (consumers, RFOs, CORE operations)
- affected parts of EOSC (platform)

**Possible questions:**
- does the provider need to be a legal entity
- do we care (and assess) about provider’s resource quality?
Practical and usable RoP

What do I need to do to become a…? What happens, when I do?

Resource provider

Different contexts:
- provider of what?
- provider from where?
- for whom is it important (consumers, RFOs, CORE operations)
- affected parts of EOSC (platform)

Why it matters:
- different nature of the resources
Practical and usable RoP

What do I need to do to become a...? What happens, when I do?

Resource provider

Different contexts:
- provider of what?
- provider from where?
- for whom is it important (consumers, RFOs, CORE operations)
- affected parts of EOSC (platform)

Why it matters:
Practical and usable RoP

What do I need to do to become a...? What happens, when I do?

Resource provider

Different contexts:
- provider of what?
- provider from where?
- for whom is it important (consumers, RFOs, CORE operations)
- affected parts of EOSC (platform)

Why it matters:
- EOSC to properly operate need its main object (resources) to be properly implemented
Practical and usable RoP

What do I need to do to become a...? What happens, when I do?

Brainstorming time

public working document
A Structure for Governance and Execution of the RoP

Initial Concepts
Key Steps in RoP Governance Process

Establishing the Process to Start

EOSC Portal Onboarding Team (EPOT)

RoP Task Force
- Updated RoP
  - Updated RoP
  - Final RoP

EOSC-A/P Governance
- Governance Consultation
  - Adopt RoP
  - Publish Final RoP & Guidelines

Community Stakeholders
- Community Consultation

RoP Board
- Form RoP Secretariat
  - Form RoP Board
  - Maintain Continuity

16 | 11 | 2022 RoP TF
Key Steps in RoP Operational Process

How it might work in practice

1. New Applications
2. New Issues
3. Issues outside of Policy
4. Onboarding Process
5. Onboarding Decision
6. Appeal Decision?
7. Resource Available in Exchange
8. Consider Appeal
9. Update & Publish RoP
10. Escalate Appeal
11. Revise RoP
12. Revise RoP
13. Update RoP
14. Onboarding Process
15. Oversight
16. Y
17. N
18. Y
19. N
20. Y
21. N
22. Y
23. N
24. Y
25. N
26. Y
27. N
28. Y
29. N
30. Y
31. N
32. Y
33. N
34. Y
35. N
36. Y
37. N
38. Y
39. N
40. Y
41. N
Key Steps in RoP Operational Process

Compliance Monitoring

EOSC Participant

- Manual Audit
- Automated Tools

RoP Secretariat

- Report Non-Compliance
- Correct Non-Compliance

RoP Board

- Reporting

EOSC-A/P Governance

- Corrected

- “Suspend” Resource

- Re-apply
Further process
TF progress so far

Aims of the TF

- To ensure the bridge from principles to more practical criteria
- Define at what level requirements can be reasonably monitored
- Set in place the framework for monitoring
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TF progress so far

TF Outputs (by the charter)

<table>
<thead>
<tr>
<th>Phase 1</th>
<th>In progress</th>
</tr>
</thead>
<tbody>
<tr>
<td>An “RoP Architecture” (structure of the rules)</td>
<td>In progress</td>
</tr>
<tr>
<td>A definition of what is an EOSC Catalogue</td>
<td>In progress</td>
</tr>
<tr>
<td>A list of the proposed of requested inputs from other task forces</td>
<td>planned</td>
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<table>
<thead>
<tr>
<th>Phase 2</th>
<th>In progress</th>
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</thead>
<tbody>
<tr>
<td>An expanded “RoP” which provides more specific criteria</td>
<td>In progress</td>
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<tr>
<td>A monitoring plan</td>
<td>In progress</td>
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</tbody>
</table>

<table>
<thead>
<tr>
<th>Phase 3</th>
<th>planned</th>
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<tbody>
<tr>
<td>An initial “EOSC Appeal” group</td>
<td>planned</td>
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<tr>
<td>Propose the setup of a RoP Board and the Advisory Group to the EOSC Association</td>
<td>planned</td>
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<tr>
<td>Provide contributions to SRIA 2.0</td>
<td>planned</td>
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Updated aims

After TF discussions

Facilitate the extensive stakeholder consultation (with EOSC Focus)

Updated RoP is ready for adoption by relevant governance bodies of EOSC

Proposed procedures are ready for implementation by relevant parties
### Timeline

**After TF discussions**

<table>
<thead>
<tr>
<th>Month</th>
<th>Event</th>
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<tbody>
<tr>
<td>November 2022</td>
<td>New RoP concepts initially presented</td>
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<tr>
<td>December 2022</td>
<td>Consultations with the affected stakeholders continue</td>
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<tr>
<td></td>
<td>Revised/Updated RoP document development based on consultations</td>
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<tr>
<td>February 2023</td>
<td>Add proposal for RoP governance process to consultations</td>
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<tr>
<td>Spring 2023</td>
<td>Presentation at the GA of the EOSC Association</td>
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<tr>
<td>Until June 2023</td>
<td>Consultations with the affected stakeholders</td>
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<tr>
<td>June 2023</td>
<td>Finalize the RoP, and the proposed governance processes</td>
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<tr>
<td>September – October 2023</td>
<td>Consultation with EOSC governance stakeholders on both RoP and related governance processes</td>
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<tr>
<td>November-December 2023</td>
<td>Formal adoption of RoP package at the GA of EOSC Association</td>
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<tr>
<td>February 2024</td>
<td>Population of the governance bodies</td>
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<tr>
<td>March 2024</td>
<td>Governance bodies start working</td>
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