

Charter: EOSC Task Force on Researcher Engagement and Adoption

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<i>Task Force:</i>	Researcher Engagement & Adoption
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Abstract

The overarching principle for developing EOSC is that research has to be at the core of the EOSC initiative. Thus, deep engagement with research communities is fundamental in order to understand their needs and requirements and ensure that the way in which EOSC operates and the existing and future community services are of use and value to researchers and respect the academic sovereignty of scientific results, research data and digital objects.

This Task Force will focus on engaging diverse research communities in order to increase their participation in EOSC. The engagement work should be conducted along and between disciplinary lines, utilising the achievements of the ESFRIs and thematic services, as well as on a country basis via engaging national initiatives, research performing organisations and scientific institutions, and by collaborating with representative bodies.

1. Main aims

The main aims of the *Task Force Researcher Engagement and Adoption* include:

- Suggest measures to increase the participation of research communities and research performing organisations from all European regions in EOSC as well as Associated Countries.
- Identify the research communities needs and requirements for research and research environments.
- Ensure balanced involvement and representation for the (inter)disciplinary and domain perspective(s) on the one hand and the (inter)national and institutional perspective(s) on the other hand.
 - National perspectives: engage research performing institutions and national (Open Science) initiatives in order to bundle national strategies on researcher engagement and bring those to the European setting; synchronise the discussion on EOSC at the national level.
 - International perspectives: leverage international initiatives aimed at coordinating activities for Open Science and Open Research commons leverage on the RDA Open Calls for EOSC to support this.
 - Disciplinary perspectives: use should be made of what has already been made available through ESFRIs, the existing science clusters and other thematic service providers. Underrepresented research communities should be targeted, engaged and supported.
- Ensure that EOSC services will be of actual use to the research community end-users by making sure that researchers can take ownership and an active role in shaping and furthering EOSC.
- Support the engagement of researchers and their communities with EOSC so that their feedback, needs and requirements for research and research environments are integrated into the development of EOSC.
- Ensure that the EOSC services will – where relevant – be based on the well understood and adopted offering from the current research infrastructure landscape, where much has been created already, such as thematic and generic services, disciplinary portals and collaboration / federation at the level of clusters.
- Explain the value proposition of the EOSC to research communities:
 - Make clear what the added value can be of using the EOSC services
 - Make clear how individual researchers can use EOSC services
 - Underline and clarify the federated nature of EOSC to researchers: how and where can EOSC services be approached / accessed?
- Identify suitable channels for the communication between EOSC-A and
 - non-member research performing organisations
 - research communities that are not directly represented by a legal entity, such as science clusters, university networks, research libraries, disciplinary networks, etc.
 - relevant national and European research projects and initiatives such as NOSCIs
 - research data management initiatives.

2. Core activities

While the term *adoption* refers to (i) research communities supporting and adhering to common standards for FAIR practices and (ii) researchers doing Open Science with thematic

services, the term *engagement* describes (i) research communities participating in EOSC-A, projects, and other initiatives or institutions, in order to adopt their requirements and feedback and (ii) research communities not only making use of EOSC offer, but also onboard services of their own. Based on this interpretation, the following activities are proposed:

- Facilitate the engagement of research communities with EOSC, at the European, national and institutional level.
 - Assess the current information position of researchers on EOSC and collect success stories of researcher engagement.
 - Identify and generate communication materials and initiate a clear advocacy programme and an engagement campaign addressed to researchers.
 - Encourage organisation of training events at various levels with multiple foci and audiences (thematic, horizontal, national, (non)technical, etc.).
 - Use existing initiatives, organisations, projects at various levels to consult with research communities to gather their requirements and feedback.
 - Universities: by utilising existing membership organisations like LIBER, LERU, CESAER or the EUA, among others
 - Topically organised: clusters, disciplinary organisations
 - National initiatives
- Output:
 - Recommendations to the EOSC-A will be provided based on data gathered after 12 months and 24 months .
 - Suggested strategies and actions to be taken up by EC-funded projects, national initiatives, etc.
 - Develop a set of incentives and rewards to strengthen research communities engagement with EOSC, as part of the broader engagement framework¹.
 - Develop a coherent narrative / explanation / visualisation of the role of EOSC for the end-users (research communities), also addressing misconceptions about what EOSC is and can offer.

3. Planned duration

The group is suggested to run 24 months as it would allow for carrying out activities planned, as well as to coordinate with the ongoing projects, initiatives and (research) communities listed under 5. *Dependencies* and the monitoring of their results.

4. Working methodology

This section aims at describing how the *Task Force on Researcher Engagement and Adoption* intends to work and engage with research communities. At this point, however, it should be noted that actual possibilities and concrete work will strongly depend on available resources:

- Clarify questions about the scope of the *Task Force on Researcher Engagement and Adoption* and about resources available.
 - Agree on mode of interaction with EOSC-A Executive Board.

¹ This bullet point might be of interest in terms of dependencies/demarcations with the TF Research careers, recognition and credit. Discussions will be advocated in order to avoid overlaps and define synergies.

- Set up the final composition of the Task Force.
- Analyse and understand how researchers are engaged on national and institutional levels, which engagement-measures have been undertaken already and what are the effects and results².
 - Collect state of the art and activities with regard to the topic on institutional, national and European level.
 - Decipher the instruments on European level that help to engage research communities, e.g. networks of research performing organisations, EURODOC, YAE, Marie Curie alumni, LIBER, etc.
 - Derive and align further strategies based e.g. on previous EOSC Secretariat activities, on-going activities in projects, e.g. EOSC-Future, and on strategy work by networks of research performing organisations and national initiatives.
- Set up a Communication Plan / Strategy.
 - Identify key actors in research at an institutional, national, European and disciplinary level, using e.g. contacts with EOSC-A members and university networks.
 - Identify (already existing) communication channels in order to involve key actors efficiently.
- Set up an activity plan taking into account the available resources.
 - Collect views, methods and activities via e.g. workshops, seminars, interviews, discussion rounds, surveys or exchange of knowledge and experience in order to sharpen the strategy on how to involve research communities.
 - Establish good and efficient web tools in order to involve research communities.

5. Dependencies

This section lists key dependencies that will affect the envisaged work, such as overlaps and potential synergies with other Task Forces, projects, initiatives and research communities.

- Relevant projects, such as:
 - EOSC-Future (April 2021-September 2023)
 - EOSC Enhance: <https://eosc-portal.eu/enhance> (until November 2021)
 - All INFRAEOSC-5 projects
 - INFRAEOSC cluster projects (ongoing into 2022) :
 - <https://www.eosc-hub.eu/eosc-hub-and-esfri-cluster-projects>
 - [link](#) to position paper
- Regional, national and institutional initiatives, such as
 - Open Science initiatives
 - Rector's conferences
 - RDA National Nodes
- Research Infrastructures cluster and network organisations, such as:
 - ERIC Forum
 - RDA communities of practice and discipline / domain-specific working and interest groups
- Dependencies between this and other Task Forces are to be identified after the first charters' documents are finalised

² This charter's Appendix already lists some reports and materials related to researcher engagement that could be used in future work. It is not complete and should be added to in the future.

6. Membership

In order to be as target-oriented as possible, an Advisory Group of a maximum of 20 people as well as a clear division of roles is proposed. A core team could be formed to streamline the work. Additionally, a balanced mix is advised of competences from the members of the EOSC-A, research performing organisations / universities, research infrastructure institutions, thematic service providers, funding organisations (especially those active in the RI ecosystem), representatives of relevant European organisations and representatives of projects / clusters.

Annex - Materials on Researcher Engagement

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Buchan, Iain, et al. (2020, September 4). Report on the online session on visions, requirements and needs for Future Research Environments in the Healthcare domain (Version 1.0). Zenodo. <http://doi.org/10.5281/zenodo.4015121>

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Strategic Research and Innovation Agenda (SRIA) of the European Open Science Cloud (EOSC). Version 1.0. February 2021: https://www.eosc.eu/sites/default/files/EOSC-SRIA-V1.0_15Feb2021.pdf