EOSC Financial Sustainability Task Force: Status, Expected Results, Support Needed

Alberto Pérez – RedIRIS Director – Task Force Participant
Spain & Portugal EOSC Tripartite Event
Objective & Deliverables

Objective

- Produce by 2023 a proposal for long term financial sustainability of the main building blocks of EOSC: EOSC-Core, EOSC-Exchange and the Federation of Data & Data Services as defined in the FAIR Lady report “Solutions for a Sustainable EOSC”.

Workplan, Deliverables

- Review of the relevant documentation, interaction with stakeholders (e.g. other EU R&I partnerships, alliances, initiatives and EU projects)
- Q3 2022: first set of models, discussed and evaluated with relevant stakeholders
- Q2 2023: validated scenarios and recommendation

Source: Task Force Charter
## Core Activities Foreseen in the TF Charter

<table>
<thead>
<tr>
<th>Core Activities</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Core</strong></td>
<td>Develop scenarios for financial sustainability of EOSC-Core</td>
</tr>
<tr>
<td><strong>Exchange</strong></td>
<td>Develop scenarios for financial sustainability of EOSC-Exchange</td>
</tr>
<tr>
<td><strong>Federation of Data</strong></td>
<td>Develop scenarios for financial sustainability of the federation of data and data services</td>
</tr>
<tr>
<td><strong>Feasibility</strong></td>
<td>Validate the feasibility of the scenarios with relevant stakeholders</td>
</tr>
<tr>
<td><strong>Compatibility</strong></td>
<td>Validate scenarios’ compatibility with national and European policies and legislation</td>
</tr>
<tr>
<td><strong>Impact</strong></td>
<td>Assess scenarios’ impact on the value proposition of EOSC</td>
</tr>
</tbody>
</table>
Organisation of Work

Monthly plenary meetings

3 self-organising subgroups, chaired by TF co-chairs, meet biweekly

Core Exchange Federation of Data

3 writers’ groups progress writing between meetings (bi-weekly meeting)

Subgroup alignment through plenary reporting/discussion, cross-group membership (organically grown)

F2F workshop 23-24 May

Communication

TF mailing list
Shared Google-drive folders

Face-to-face workshop in Brussels, 23-24 May 2022
Current Status

• In process of compiling proposals
  • Fulfilment of Q3 milestone (September)
  • Main target groups: EOSC-A Board, Mandated Orgs, EC, Steering Board
  • Circulation level to be discussed and agreed within TF
• Table of Contents drafting in progress
  • Much of the content has already been drafted

• Developed proposals for EOSC Core
  • Clear proposals, implications for governance
  • Meeting with EC legal experts scheduled to discuss legal instruments
• Progressing proposals for EOSC Exchange
  • Clarity on desired result, gaps remain in detail of how to achieve it
• Progressing proposals for EOSC Federation of Data
  • Use cases illustrate requirements and point the way forward, probably need more comprehensive coverage

• Planning first stakeholder evaluations (not public consultation yet!)
Considerations (1 of 2)

• Task Force lifespan
  • Envisaged to run for 24 months from Sept 2021
    • But final milestone is Q2 2023
  • In practice, started work Nov 2021
    • No formal arrangements to change workplan/lifespan, to date...

• Shortage of resource
  • In spite of very good commitment and contributions...

• Scope (creep)
  • Financial scenarios, not governance

• There won’t be a single financial (funding) model for all of EOSC
Considerations (2 of 2)

• Target time period for proposals
  • Envisaged in our original workplan as being from mid-2025 onwards
  • In reality, from 2030 onwards

• Our focus
  • Additional cost categories arising for/due to EOSC
    • (Not aiming to cost all possible relevant activities!)

• EOSC is incomplete if only consider Core-Exchange-Data Federation
  • Need to also consider Interoperability Framework and Support Activities
  • Joined-up approach is necessary

• Exchange and Data Federation lack clear definitions
  • Value propositions and architecture
Expected Results by December 2022

• Initial proposals due by September 2022

• Validation ongoing from October 2022
  • Activities still to be planned
  • Consultation with key stakeholder groups likely (timing tbc)
  • Develop (and adapt) detail of scenarios
Possible Support Needed from T5.3

- “Initial evaluation with key stakeholders”?
- Expert knowledge – e.g. economics, market dynamics and modelling
  - To help develop the proposals and fill in the blanks
- Coordinate/manage consultation activities
Thank you. You can contact me at dale.robertson@egi.eu