



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



Funded by
the European Union

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



Core	Develop scenarios for financial sustainability of EOSC-Core
Exchange	Develop scenarios for financial sustainability of EOSC-Exchange
Federation of Data	Develop scenarios for financial sustainability of the federation of data and data services
Feasibility	Validate the feasibility of the scenarios with relevant stakeholders
Compatibility	Validate scenarios' compatibility with national and European policies and legislation
Impact	Assess scenarios' impact on the value proposition of EOSC

Organisation of Work



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



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

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

eoosc | Focus

Thank you. You can contact me at dale.robertson@egi.eu



Funded by
the European Union