



EOSC Tripartite Group

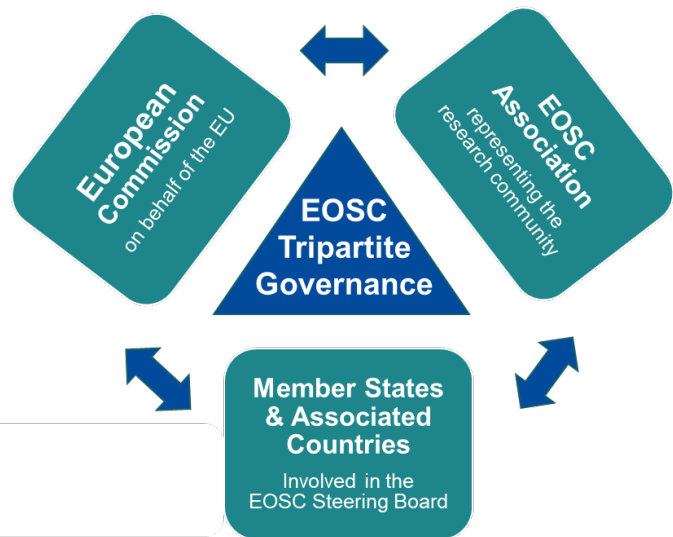
*Pantelis Tziveloglou
Open Science & Research Infrastructures,
DG RTD*

*Research and
Innovation*



EOSC steering, governance, financing

current set-up

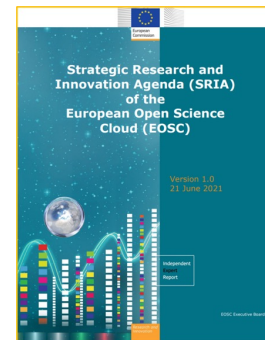


EOSC tripartite governance

- ensuring dialogue and strategic coordination between EC, EU Member States and Associated Countries, and the EOSC Association
- EUR 406 million reported investments in EOSC and open science by MS/AC in 2021

EOSC Co-programmed Partnership

- a community driven process
- pooling commitments and resources along priorities set in the EOSC Strategic Research and Innovation Agenda;
- EUR 1 billion foreseen for 2021-2027



Towards operationalising the EOSC Federation

- **Discussions and preparatory work within communities and countries on the development of the EOSC Federation have intensified**
 - EOSC EU node under development, to be launched this Autumn
 - EOSC Association position on EOSC Federation/Nodes; Federation Handbook
 - ongoing discussions/initiatives in countries on (national) node development
 - INFRAEOSC projects developing EOSC core components, federation-related specs
 - different levels of maturity across countries and communities
 - different implications of implementation at national, thematic, EU level
- **Need to agree on the requirements and policies shared across the EOSC Federation**
 - technical, legal and organizational requirements for node validation, enrolment and operations
 - baseline access/acceptable use policies & rules for participation of service providers
 - ...

EOSC Tripartite Group

- **The successful operationalization of the EOSC Federation is the Tripartite Governance's current main priority**
- **The EOSC Tripartite Group was set up to prepare commonly agreed positions and support the strategic steering of the Tripartite Governance for the establishment and operation of the EOSC**
- **EOSC Tripartite Group operates under the mandate of the Tripartite Governance**
- **NOT a new structure or governance layer**

EOSC Tripartite Group

- **Tasks/activities**

- coordinating and steering of the processes for the operationalisation of the EOSC federation
- stock-taking of related initiatives (incl. by the EOSC Association and EU funded projects)
- seeking expert advice and setting up inclusive community consultations as needed
- acting as a point of reference for recommendations to the EOSC community
- ensuring coherence with the ongoing deployment of the EOSC EU node
- reports to the Tripartite Governance

- **Composition**

- the EC, the EOSC Association and the EOSC Steering Board indicate their representatives.
- Variable geometry of participation to a given meeting or task, according to the topic.
- Possibility of inviting experts

- **Duration**

- determined by the establishment of the future (post-2027) governance of EOSC

EOSC Tripartite Group

current activities

Meetings / discussion points

25 April

- Working modalities
- Requirements for EOSC nodes

15 May

- Requirements for EOSC nodes

31 May

- Federation Handbook

17 June

- EOSC Beyond pilots
- Node operator & service provider
- Questionnaire
- First chapter of Handbook

...

Building the EOSC Federation: requirements for EOSC Nodes

[draft v 24/5]

Disclaimer: This document is primarily addressing entities interested in enrolling as EOSC Nodes. The requirements will evolve during the uptake of the EOSC Federation and are planned to be specified in the EOSC Federation Handbook. The document is not about the onboarding of service providers to EOSC Nodes, and it does not elaborate on the steps to be taken for the uptake of the EOSC Federation.

The European Open Science Cloud (EOSC), the Common European Data Space for R&I¹, is the EU's flagship initiative for the digital transformation of research.

The vision for EOSC is to put in place a system for researchers in Europe to store, share, process, analyse and reuse, within and across disciplines and borders, FAIR research outputs, such as research data, publications and software.

It is rooted in open science and deployed as a network between data repositories and services of research infrastructures and other scientific service providers to develop a trusted federation of research data and services for R&I in Europe. The development of the building blocks of the EOSC Federation will count on the latest community know-how, adopting and building on well-established and well-functioning existing structures and frameworks.

EOSC is transitioning to a fully operational mode: the EC-procured 'Managed Services for the EOSC Platform' are currently being developed and gradually put in operation under the branding of the EOSC EU Node², making it the first node of the EOSC Federation.

At the same time, partly through investments by the EU, its Member States and Horizon Europe associated countries, several thematic communities and national initiatives are maturing their infrastructures and services for EOSC readiness.

The EOSC Nodes will be the entry points for end users to the entire EOSC Federation, with each node offering its own services (including data reposting and accessing services) and possibly services of other providers (third-party services onboarded to the EOSC Node), in compliance with the EOSC Federation's common rules and requirements as well as the own policies of the EOSC Node. An organisation may therefore enrol its activities as an EOSC Node in the EOSC Federation. [Home / EOSC / Building the EOSC Federation / Questionnaire: Build-up phase...](#)

These nodes

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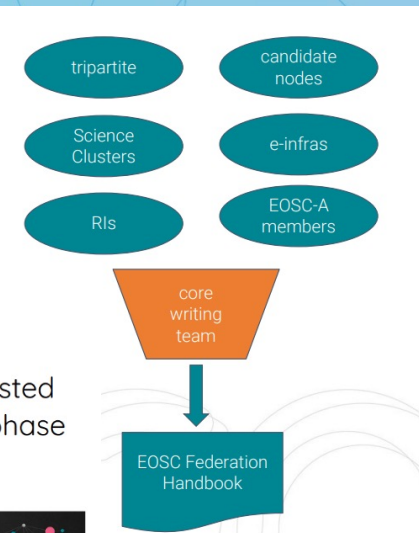
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Questionnaire for parties interested in contributing to the build-up phase of the EOSC Federation

The construction of the future EOSC has entered an important phase. The EOSC EU Node is expected to be presented to the scientific community in the frame of the EOSC Symposium in October 2024. Meanwhile, the discussions are intensifying on the aims, structure and tasks of the individual EOSC Nodes that will complement the EOSC EU Node to initiate the formation of the EOSC Federation.



Thank you!



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EOSC Federation Handbook

Progress updated by the EOSC Association Board





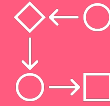
Aim

Prepare a handbook for the **EOSC Federation of Nodes** which covers the essential aspects of the purpose of the federation, what a node is, how to join, rules of governance, value proposition and rules of participation



Who

Driven by the EOSC-A and contributors from all interested parties (EC, Member states/ACs, RIs, EOSC-A members, etc.) who volunteered to participate in the co-creation of the Handbook



Process

The document is being written collaboratively with weekly meetups, open consultations, and sprints

Volunteers

33 volunteers expressed their interest and willingness to write. After evaluating their CVs a total of **28** were selected. They are organised in two groups – Writers and Reviewers.



Writers

The writers had their kick-off meeting on **6 June**. Meet weekly to discuss progress & distribute tasks.

- First task was to write a **mission statement for the EOSC Federation**.
- Now writing the first chapter on “**Purpose of the EOSC Federation**” collectively. Multiple writers are assigned to each section.

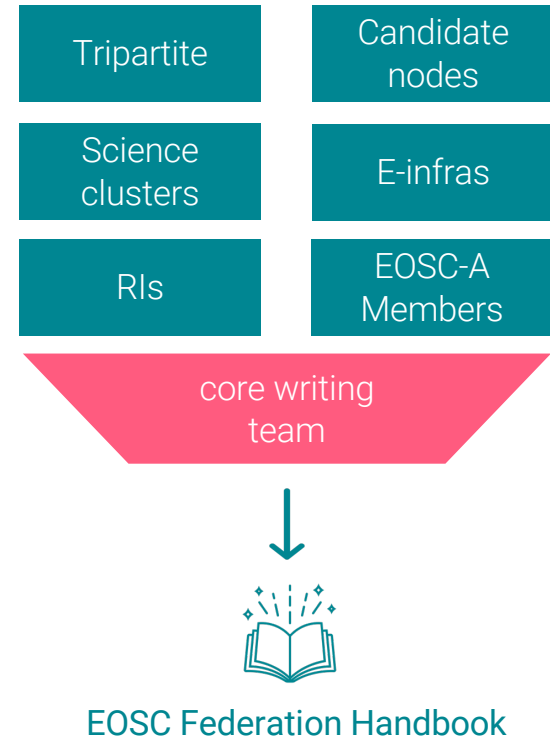


Reviewers

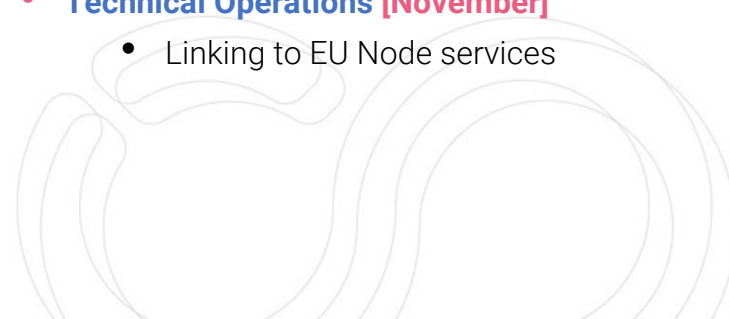
The reviewers will meet end of June for the first time to review the first chapter.

Actors

- Tripartite governance (**Reviewers**)
- EOSC-A membership (**15 Writers**)
- Candidate nodes (*not identified yet*)
- RIs/Science clusters (**5 Writers**)
- E-infras (**5 Writers**)
- EOSC projects (**10 Writers**)
- Member states (**5 Writers, 1 Reviewer**)
- etc.



- **Purpose [June]**
 - Goals & purpose of EOSC Federation
 - Success criteria for the Federation
- **Operational structure and responsibilities [July]**
 - Federating Entity
 - Nodes
 - Use Cases
- **Governance and legal framework [September]**
 - Governance structure
 - Legal framework
 - Policies (Rules of Participation, Access Policy, Acceptable Usage Policy, ELSI, IP, etc.)
 - Communication and External Relations
 - Risk management
- **EOSC platform [October]**
 - FAIR Data & Services (Core, Exchange)
 - Interoperability (EOSC Interoperability Framework)
 - Provisions for cybersecurity coordination
 - Links to external entities (e.g. other data spaces, EuroHPC, etc.)
 - Scientific services (discovery)
 - Training
- **Technical Operations [November]**
 - Linking to EU Node services



- **Outline**
 - Chapter 1 – Purpose of the EOSC Federation
 - Vision
 - Mission
 - Purpose and advantages
 - Users
 - Outcomes
 - Scope of Handbook
- **Progress** – writers actively contributing (10 pages already)





Planning



- January 2024 – Preliminary draft of Handbook outline prepared with EOSC Focus
- March 2024 – Kick-off of Handbook writing process with core team (EOSC-A + EOSC Focus)
- April 2024 – Preliminary discussion of EOSC Node during the Tripartite meeting
- May 2024 – Call for Contributors to Handbook and selection of Writers + Reviewers
- May 2024 – Breakout Session at EOSC-A General Assembly to gather feedback
- June 2024 – Kickoff meeting of Handbook Writers team and started writing Chapter 1
- 1 July 2024 – Preliminary draft of Chapter 1 to be discussed at Tripartite Group meeting
- July 2024 – Preliminary draft of Chapter 2
- Sept' 2024 – Preliminary draft of Chapter 3
- Sept' 2024 – Open consultation meeting on Handbook
- October 2024 – Preliminary draft of Chapter 4
- October 2024 – Draft of Handbook presented at EOSC Symposium '24
- Nov'2024 – Preliminary draft of Chapter 5
- Nov' 2024 – Mature draft of Handbook to be endorsed at next Tripartite meeting

- GA#8 Breakout Sessions** – during the GA#8 two breakout sessions were organised for 3 groups. The goal of the breakout sessions was to gather questions and feedback to be answered in the EOSC Federation Handbook.
- Questions** – A total of 151 questions were gathered and have been classified by chapter. Roughly 50 questions concern the first chapter on Purpose.
- Answers** – The EOSC-A editing team together with the writers are addressing the questions and using the answers as input material for the first chapter

Engaged participants

160 out of 208 Slido participants engaged with polls or Q&A.



Q&A engagement

150 out of 208 participants asked a question or voted in Q&A.



Poll engagement

63 out of 208 Slido participants voted in a poll.



Participants asking in Q&A	65
Up or down voting in Q&A	146
Voting in polls	63

Engaged participants score ⓘ **77%**

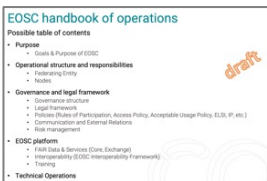
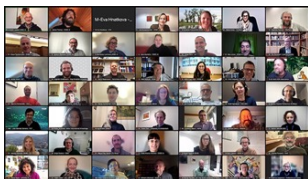
Anonymous / all questions	110 / 173
Answered / unanswered questions	5 / 168
Upvotes / downvotes	898 / 0

Q&A engagement score ⓘ **72%**

Total poll votes	63
Polls with responses	1
Average votes per poll	63

Poll engagement score ⓘ **30%**

eosc Evolution of Node Concept in 2024



January

February

March

April

May

2 Community webinars giving updates on federation & nodes

Integration of community feedback & drafting of table of contents for EOSC Federation Handbook

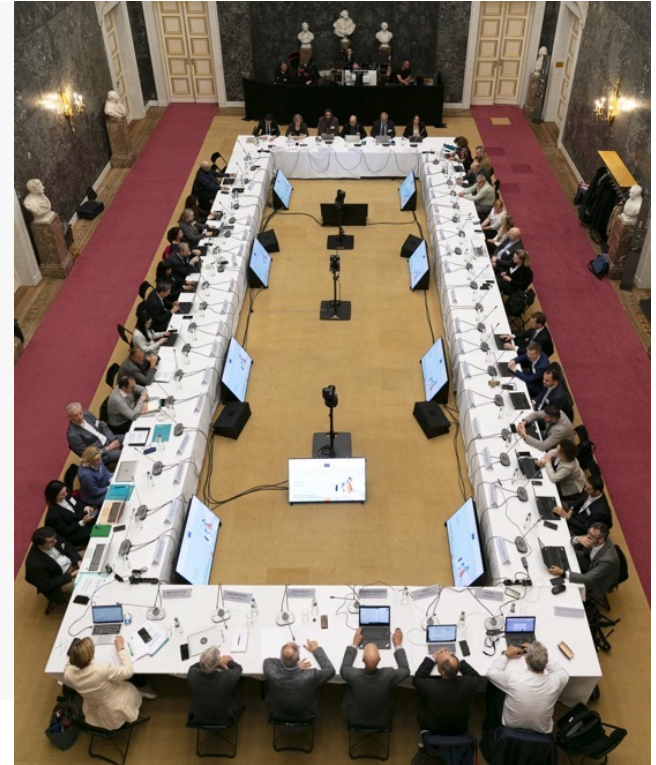
Discussion of EOSC Federation Handbook concept with EC and EOSC-SB Policy Group

Presentation of "Minimum requirements of Nodes" draft at European Tripartite Event

Tripartite group discussed co-creation of Federation Handbook and candidate nodes

Steps under governance of Tripartite Group

May	Call for Handbook contributors
28 May	Discussion at EOSC-A GA#8
31 May	Tripartite Group Meeting / Presentation of an Integrated Work Plan
6 June	Kick-off meeting with Handbook drafters (weekly meetings)
June	Launch of questionnaire
5 July	Partnership Board Meeting #6 Continuous work over the summer
Sept	Community consultation phases
Oct	EOSC Symposium
Nov	Tripartite Event Budapest





Launch of the Questionnaire

for parties interested in contributing to the build-up phase of the
EOSC Federation



Building the EOSC Federation: Requirements for EOSC Nodes

https://eosc.eu/wp-content/uploads/2024/05/EOSC-A_GA8_20240527-28_Paper-G_Update_EOSC_Nodes_requirements-DRAFT-v240524.pdf

Building the EOSC Federation: requirements for EOSC Nodes

[draft v 24/5]

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The vision for EOSC is to put in place a system for researchers in Europe to store, share, process, analyse and reuse, within and across disciplines and borders, FAIR research outputs, such as research data, publications and software.

It is rooted in open science and deployed as a network between data repositories and services of research data and services for R&I in Europe. The development of the building blocks of the EOSC Federation will count on the latest community know-how, adopting and building on well-established and well-functioning existing structures and frameworks.

EOSC is transitioning to a fully operational mode: the EC-procured 'Managed Services for the EOSC Platform' are currently being developed and gradually put in operation under the branding of the EOSC EU Node², making it the first node of the EOSC Federation.

At the same time, partly through investments by the EU, its Member States and Horizon Europe associated countries, several thematic communities and national initiatives are maturing their infrastructures and services for EOSC readiness.

The EOSC Nodes will be the entry points for end users to the entire EOSC Federation, with each node offering its own services (including data depositing and accessing services) and possibly services of other providers (third-party services onboarded to the EOSC Node), in compliance with the EOSC Federation's common rules and requirements as well as the own policies of the EOSC Node. An organisation may therefore enrol its activities as an EOSC Node in the EOSC Federation or onboard its services on an existing EOSC Node as a provider.

These nodes will thus offer (scientific) services and/or data that adhere to the FAIR principles, including curated research outputs (such as publications, datasets, software, etc.), specialised

¹ <https://digital-strategy.ec.europa.eu/en/library/second-staff-working-document-data-spaces>

² <https://open-science-cloud.ec.europa.eu/>

and/or platform services, and/or data processing

EOSC Federation as nodes will benefit from:

By enrolling in the EOSC Federation as nodes, a larger pool of users, within and especially beyond their local focus, enabling innovative use and exploitation of data, and allowing to expand beyond research to industry and the wider economy. Nodes will connect to the other currently deployed Common European Data Spaces, and will profit from a much broader access to FAIR data of the EOSC Federation, enriching their own research, as well as their own contributions to the EOSC Federation.

Nodes will take advantage of commonly pooled resources and services, such as AAI, resource catalogues and registry services, reducing duplication of research and development efforts and their business models.

Organisations enrolling nodes in the EOSC Federation will benefit from the latest European standards for research output and will seamlessly comply with EU research and digital transformation rules and policies.

Organisations enrolling as EOSC Nodes or to be considered as EOSC Nodes will benefit from the EOSC Federation.

Nodes will ensure the quality of services offered by and to their end users, and will have specific responsibilities towards other EOSC Nodes, and towards their end users.

Nodes responsible for an EOSC Node aim to ensure that they can meet the legal capacity to take up this responsibility and to be able to fulfil their part of EOSC according to its long-term vision.

Nodes responsible for an EOSC Node must be a public-benefit legal entity (Member State or an associated country) with legal personality recognised in all Member States and associated research organisation of European interest. The node must have the necessary legal and financial arrangements in place to ensure the fulfilment of the possible agreements with other partners and to ensure the fulfilment of the possible agreements with other partners (e.g. providers making their data or services available to the node, with other nodes and/or with a potential future generation).

Nodes responsible for an EOSC Node shall be able to provide services at the request of the research communities, operating in a domain.

Nodes responsible for an EOSC Node must be able to provide services, beyond offering its own services, an EOSC Node must be able to provide services on its own and to ensure that these services are provided in accordance with the standards, rules, and policies of the federation, including transparency, and trustworthiness of these services.

Nodes responsible for an EOSC Node shall have the capacity to provide services and capabilities to be offered across the federation such as on infrastructure, resource catalogues and registry services, and helpdesks.

Nodes responsible for an EOSC Node shall be able to monitor and report the activity of the EOSC Federation (e.g. monitoring usage of data, services, and the quality of the provided services, including the activity of third parties, and the compliance with the Federation's policies and standards, including the EOSC interoperability (FAIR) and sovereignty standards.

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Requirements for Candidate EOSC Nodes³

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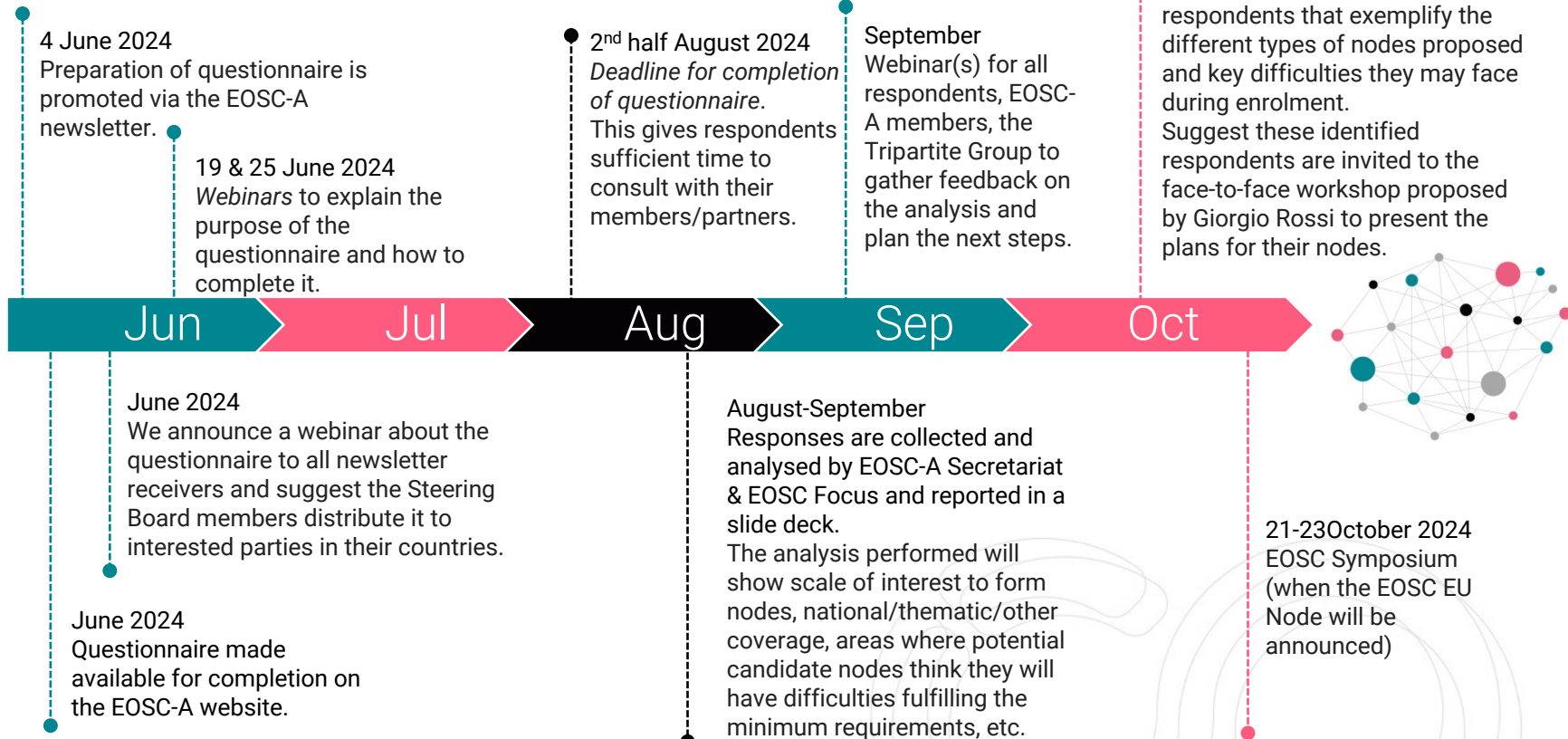
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Status:
24.05.2024

eosc Proposed timeline



Questionnaire for parties interested in contributing to the build-up phase of the EOSC Federation

The construction of the future EOSC has entered an important phase. The EOSC EU Node is expected to be presented to the scientific community in the frame of the EOSC Symposium in October 2024. Meanwhile, the discussions are intensifying on the aims, structure and tasks of the individual EOSC Nodes that will complement the EOSC EU Node to initiate the formation of the EOSC Federation.

The Tripartite Governance of EOSC is therefore launching a questionnaire to gauge the scale and scope of general interest and readiness for the build-up phase of the EOSC Federation. Interested parties are invited to reply to the questionnaire as the first step in their eligibility to contribute to a testbed of potential EOSC Nodes representing the different stakeholders involved in the research communities of Europe.

Based on the replies to the questionnaire, several organisations will be invited by the Tripartite Governance to contribute to the refinement of the EOSC Federation concept during the build-up phase. The build-up phase will help the Tripartite to gain experience from cooperation between the future EOSC EU Node and the individual future EOSC Nodes, and to test the different aspects of the [EOSC Federation Handbook](#) in practice. The invited organisations shall reflect the different types of stakeholders and organisations to ensure the best possible representation of the various European research communities.



[Read briefing papers](#)

[Register for webinars](#)

[Proceed to questionnaire](#)

DEADLINE: 18 AUGUST 2024, 23:59 CEST

WEBINARS FOR PARTIES INTERESTED IN BUILDING UP THE EOSC FEDERATION

<https://eosc.eu/eosc-about/building-the-eosc-federation/questionnaire-for-parties-interested-in-contributing-to-the-build-up-phase-of-the-eosc-federation/#briefingpapers>

No additional funding is associated with this activity. Submitting the questionnaire does not commit the respondent to onboard their resources (i.e. services/data repositories) nor to establish a future EOSC Node. At the same time, the invitation to form a node in the build-up phase does not automatically guarantee the status of a federated EOSC Node at a later stage. The decision of the future structure, organisation and funding of EOSC will follow the negotiations of the next European Framework Programme for Research and Innovation, FP10.

WEBINARS FOR PARTIES INTERESTED IN BUILDING UP THE EOSC FEDERATION

The EOSC Association will hold two webinars in June to explain the purpose of the questionnaire and provide guidance on how to complete it. [Registration is required to attend](#). Interested participants can choose from the following dates and times:

- **Wednesday, 19 June 2024, 15:00-16:00 CEST**
- **Tuesday, 25 June 2024, 15:00-16:00 CEST**

1. Do you intend to offer your institutional resources through a future EOOSC Node of the EOOSC Federation?
2. Do you wish to join the build-up phase with the intention to build a potential future EOOSC Node?
3. Are you able to identify the legal entity that would assume legal responsibility for the potential EOOSC node?
4. Please list the resources your organisation intends to make available via the node (text list, for each entry give the TRL (1-9) and any restrictions that apply to use of the resource) and describe their added value to the EOOSC Federation.



5. Are all these resources owned/operated by your organisation (yes/no)?
If no, please indicate the owner/operators (text, select country)
6. Please estimate when you would be able to start offering resources to the EOSC Federation? (month/year)
7. What support/competences/training will be offered to the users of the resources made available via the potential node? (text)
8. What is the added value that you see for you and for your users in contributing to the EOSC Federation? (text)
9. Please add any additional remarks you would like to make about the EOSC Federation (text)
10. Upload supporting documents (optional)

neosc



Q&A



**MINISTÈRE
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NATIONAL PERSPECTIVES FOR THE EOOSC FEDERATION

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Co-chair of the [EOOSC Steering Board](#) and of the [ESFRI-EOOSC Task Force](#)



EOSC : some facts

- Largest investment in EOSC (and in research in general) is by the countries in the countries
- Human resources, research infrastructures, e-infrastructures
- Interest to invest into persistent solutions for research, valorisation
- EOSC projects: create sustainable solutions (services, networks, competence, ...)
- Reflection necessary in each project: how to ensure continuation of relevant activities after the project ends?
- Commission provides support for development through Horizon Europe
- Support on the long term has to be ensured at the institutional and/or national level
- Start this discussion early (ideally during the project planning phase)
- Ability to find support will depend on the domain, institution, country you are in

EOSC : what needs to change?

- co-programmed partnerships under *Horizon Europe* until end of 2027
- the core of EOSC has been based on projects (EOSC-hub, EOSC Future) and so has the development for EOSC (H2020 & Horizon Europe INFRA-EOSC) : difficulty to provide continuous services
- under Horizon Europe, EOSC is a contract between Commission and EOSC Association: responsibility of member states and associated countries rather limited
- contribution to EOSC by EOSC Association members on a best-effort basis, EOSC marketplace was rather a catalogue of services than a service platform (that should change in the EOSC EU Node)
- wider impact of EOSC has to be demonstrated

The EOSC Federation will deliver a more tangible EOSC — for users and providers

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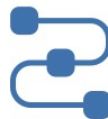
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Exchange with

EOSC Federation

- build a truly federated system with reliable service provision
- EOSC EU Node + service / resources / thematic nodes

Some questions:

- who can be a node? [Minimum requirements document](#) (version 24/05/2024)
- granularity? domain dependent, to be discussed
- who sets up the rules and who decides? EOSC Tripartite (EC, EOSC-A, MS/AC)
- financing? Under Horizon Europe: national/institutional + some development support by the Commission through the HE INFRA-EOSC work programme (tbd)

Documents:

- [EOSC Association Board position paper on the EOSC Federation and the role of EOSC Nodes](#),
- [ESFRI-EOSC Science Clusters position statement](#),
- [GEANT EOSC Nodes position paper](#),
- [e-IRG recommendations on the future of EOSC](#)

EOSC Federation next steps

- EOSC EU Node system to be up-and-running by end of 2024
- Tripartite Group
- Need to demonstrate the value of EOSC and of the EOSC EU Node : Identify some early adopters, which have use cases with significant potential
- More nodes to be onboarded
- >>> fill the [EOSC Federation questionnaire](#)
- awareness: lots (most) of EOSC success does not necessary need most of the EOSC EU Node services (e.g. ESFRI-EOSC Clusters)
- EOSC Federation needs to learn and rely on experience of research infrastructures
- ESFRI-EOSC Task Force (EOSC Steering Board, ESFRI, EC / DG-RTD + observers)

Important: Long term sustainability of the EOSC Federation

Future EOSC: from model to reality under FP10

Some elements on which most agree in the tripartite (EC, EOSC SB, EOSC Association):

- external entity for EOSC EU Node
- avoid project-based financing : finance over duration of FP10
- tripartite governance
- stronger engagement of member states

Models for governance & financing:

- institutionalised (e.g. Joint Undertaking [public-private] or Article 185 [public-public]) or
- non-institutionalised (Framework Partnership Agreement, budget entrusted to external entity)
- implementation models in FP10 might be different

~~FP10 discussions will start 2025 (European Commission + Member states)~~

European Open Science Cloud

- EOSC is a process, an interface, a community, a portal, a co-programmed partnership — the federation is part of this process
- Main investment into EOSC on institutional / national level
- Importance of Research Infrastructures and e-infrastructures
- Demonstrate impact of EOSC EU Node and of EOSC in general
- Reflection process this summer: who wants to be a node and who wants to contribute to a node?
- Discussion process needs all EOSC actors to participate — make your voice heard



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