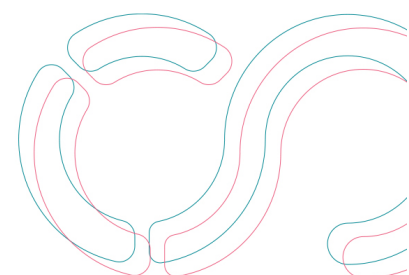


EOSC Federation Handbook

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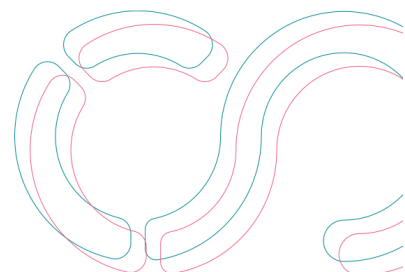
- Editorial, formatting, and spelling,
- Clarification.

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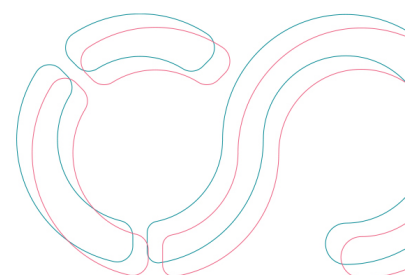


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Introduction: Scope, target audience and outline of the Handbook

The EOSC Federation Handbook provides an overview of the organisational and operational structure and technical characteristics of the EOSC Federation.

It aims to serve as a practical guideline for organisations that are interested in making their resources available within and across the EOSC Federation. Such organisations can achieve this objective by creating and operating an “EOSC Node”, which together form the EOSC Federation, and/or by including their resources in one or more EOSC Nodes operated by other organisations.

The intended users of the Handbook include primarily facility managers, policy makers and technical staff of research performing and funding organisations, research infrastructures, providers of scientific services and other resources, and e-infrastructures.

The “end-users” of the resources accessible through the EOSC Federation, i.e. the researchers, are not directly targeted by the Handbook but they may still find useful information about the scope and organisation of the EOSC Federation. It is important to build the EOSC Federation in the most transparent manner and with the understanding of the research community.

Chapter 1 lays the foundations on which the rest of the Handbook is built. It includes the purpose of the EOSC Federation, its primary users, its main advantages and expected outcomes (success criteria).

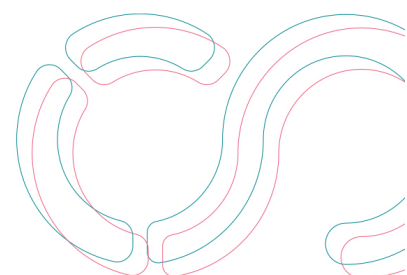
Chapter 2 concerns the governance framework and legal structure. It describes the governance structure in its current state, policies, communication and relations with other initiatives, and how to manage any possible risks. Chapter 2 will identify governance roles for the Federation as well as for candidate Nodes.

Chapter 3 defines and describes the operational structure of the EOSC Federation. The requirements to become an EOSC Node, technical or otherwise, are outlined here. The chapter also includes examples of existing or foreseen EOSC Nodes.

Chapter 4 details the architecture of the EOSC Platform, how services can be set up and interlinked, and specifically the requirements for federated capabilities and relationships with the EOSC EU Node.

Chapter 5 contains a description of the characteristics of FAIR data and scientific and IT services that will be available in the EOSC Federation, as well as the interoperability (with the EOSC Federation and in relation to other entities like e.g. other European Common Data spaces, EuroHPC, etc.) and cybersecurity requirements and training required to realise the EOSC Federation.

Chapter 6 describes the policies, including rules of participation, expected to be put in place to guide the operation of the EOSC Federation.



1 Purpose, expected outcomes and measures of success

1.1 Purpose

The EOSC Federation aims to provide Europe's researchers with the necessary digital resources to conduct research within and across disciplines and borders according to the principles of FAIR data and open science, in a trustworthy and secure environment driven by the scientific communities.

This is done by putting in place a 'system of systems' with appropriate organisational and operational structure, between institutional, regional, national, or European data repositories, research infrastructures, e-infrastructures and other scientific service providers. For the purpose of the EOSC Federation, these "institutional, regional, national, or European data repositories, research infrastructures, e-infrastructures and other scientific service providers" – i.e. the "systems" comprising the "system of systems" – are considered "EOSC Nodes".

The target end-users of the resources of the EOSC Federation are primarily researchers of research performing organisations and research infrastructures across Europe and beyond. Potential users of the EOSC Federation also include citizen scientists and researchers in industry.

The organisations that participate in the EOSC Federation will work together to better understand and address the needs of researchers, providing them with appropriate support and equipping them with the right tools.

The EOSC Federation will seek to provide a seamless experience to its users, aiming for a high degree of integration and interoperability of the provided resources. It will count on the latest community know-how, adopting and building on well-established and well-functioning structures and frameworks.

It will increase adoption of the FAIR principles through standardised FAIR practices and improved data and service interoperability and will foster a more collaborative and integrated scientific environment.

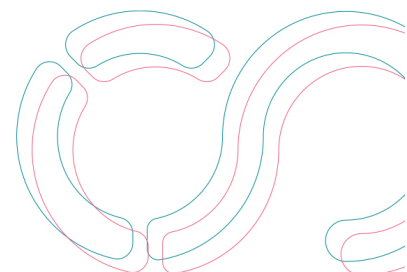
The EOSC Federation will act to secure long-term preservation of selected data and will contribute to the alignment of national guidelines facilitating openness wherever possible. It will monitor the activity of the Federation, the included resources and opportunities for consolidation.

To fully succeed in enabling Open Science and achieving global impact, the EOSC Federation will seek to establish links with similar initiatives in other regions of the world.

The development of the EOSC Federation will make a key contribution to the overall policy objectives of EOSC to mobilise, align and scale resources and engagement across Europe

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towards accelerating Open Science, FAIR data management, higher productivity and increased reproducibility in research. It will establish the Common European Data Space for R&I¹, which is the EU's flagship initiative for the digital transformation of research and will also contribute to delivering the objectives of the EOSC Partnership, as set out in the EOSC Research and Innovation Agenda (SRIA)².

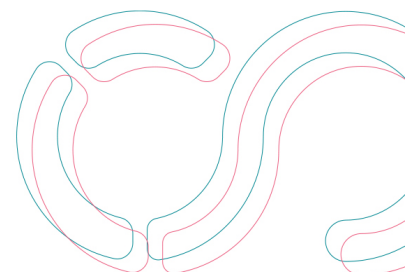
1.2 Expected outcomes and measures of success

The expected outcomes of the EOSC Federation can be summarised as follows:

- **Enhanced access to and use of digital resources:** The EOSC Federation will facilitate access to and use of digital resources needed to conduct research such as research data and metadata, publications, software, compute and storage capacity, analysis services and tools;
- **Facilitated research reproducibility:** The EOSC Federation will enable researchers to connect available data, tools and services into methodologically grounded, integrated, reproducible workflows based on Open Science practices;
- **Increased collaboration, community and knowledge sharing:** The EOSC Federation will foster a culture of collaboration, community and knowledge sharing;
- **Improved efficiency and higher impact of investment in research:** the EOSC Federation will make research more efficient and scientific outcomes more visible, facilitating re-use and enabling cross domain research;
- **Increased standardisation and interoperability:** The EOSC Federation will promote the development and adoption of common standards and best practices to facilitate research across disciplines and borders and compliance with national and European legislation;
- **Better support for thematic initiatives:** The EOSC Federation will contribute to the continued advancement and readiness of thematic communities that are interested in participating in the EOSC Federation;
- **Improved research integrity:** The EOSC Federation will enable and encourage the adoption of Open Science practices to produce FAIR data, contributing to improved integrity and excellence of research.
- **Increased robustness and trustability:** The EOSC Federation will foster quality-control of the FAIR objects by the research community and pursue robustness from cyberattacks and malicious infiltration of unreliable digital objects.
- **Increased data sovereignty:** The EOSC Federation will enable Member States to exercise their full right and power over documents, data and software, seeking to strike

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

² [The Strategic Research & Innovation Agenda and its Multi-Annual Roadmap - EOSC Association](#)

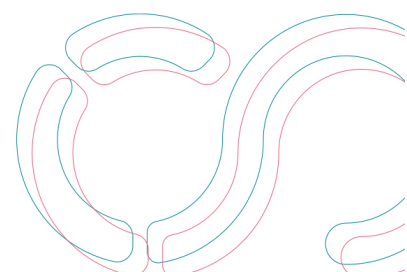


the right balance between ensuring sovereignty and ease of use. This will be achieved through inclusion of capabilities for identity and rights management that offer individuals, organisations or governments a way of exercising the required control while keeping knowledge ‘as open as possible, as closed as necessary’.

The success of the EOSC Federation will be measured via Key Performance Indicators, including, but not limited to:

1. **User engagement:** The number of active users of the EOSC Federation services coming from different research categories including researchers, students, institutions, funders, policy makers, industry, general public (citizen science, journalism); active users of the EOSC Federation services and the frequency and duration of user sessions within the platform; and user satisfaction and feedback.
2. **Digital resource accessibility and usage:** The number of digital resources accessed and used by EOSC Federation users e.g. number of datasets cited across different research projects; the level of compliance with FAIR principles in research data management (RDM). The long-term preservation and reuse of high-quality digital resources.
3. **Service efficiency and availability:** The uptime and reliability of the EOSC Federation services and platforms; online documentation; response time for user queries and support requests; time and effort required to on-board resource providers and enrol new nodes; efficiency and availability of EOSC Federated Capabilities.
4. **Service portfolio:** The number of new services and tools integrated into the EOSC Federation including metrics of their usage;
5. **Collaboration, community and knowledge sharing:** The number of collaborative projects and initiatives facilitated across the EOSC Federation (among and between the EOSC Nodes); participation in community events, workshops, and training sessions; number of interdisciplinary research projects supported; number of reproducible research workflows published.
6. **Standardisation and Interoperability:** Guidelines on common standards and best practices to be adopted across the EOSC Federation; the level of success in adopting interoperability guidelines and their effectiveness in enabling interoperability.

Overall, the EOSC Federation shall contribute to the sustainability of research organisations in Europe, which will take advantage of commonly pooled resources and capabilities, reducing duplication of research and development costs.



2 Governance

This chapter describes the current governance structure of the EOSC Federation.

The described structure is merely a transitional governance structure. It utilises the structure that was put in place in 2021 to provide the strategic steering of the overall EOSC initiative and to implement the EOSC co-programmed Partnership. It is expected to remain in place at least until the build-up phase of the EOSC Federation is completed.

The eventual governance structure may include an ultimate decision-making body, a body responsible for implementing these decisions and for running the day-to-day operations of the EOSC Federation, advisory bodies representing the EOSC Nodes and the wider EOSC stakeholder community, as well as other working groups tasked with addressing specific topics.

The eventual governance of the EOSC Federation will be shaped and implemented gradually, and decided by the current governance. Any developments will be reflected in updated versions of the Handbook, along with each body's Terms of Reference and Rules of Participation.

2.1 Structure of the current (transitional) EOSC Federation governance

EOSC Tripartite Governance

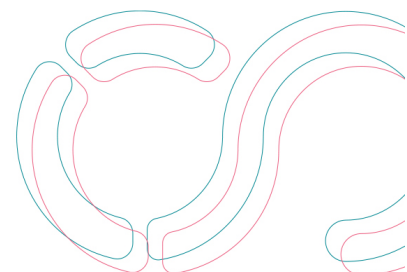
The structure that was put in place in 2021 in order to drive the development of the overall EOSC initiative, including its objective of setting up a federation of data infrastructures and scientific service providers, is composed of a) the European Commission (Directorates-General for Research and Innovation [DG RTD] and for Communications Networks, Content and Technology [DG CNECT]); b) the [EOSC Association](#), an international non-profit organisation seated in Brussels representing the broader EOSC stakeholder community; and c) the EOSC Steering Board³, a European Commission expert group ([E03756](#)) whose Members are representatives of the EU Member States and countries associated to Horizon Europe. These bodies follow a consensual approach regarding the key strategic decisions for the development of EOSC, and organise their discussions and decisions under the so-called 'EOSC Tripartite Governance'.

The EOSC Tripartite Governance is therefore the ultimate decision-making body responsible for setting out the overall strategy and operational planning, including at this stage the process towards establishing an operational EOSC Federation. It may also establish additional groups and/or task forces as it deems necessary in order to effectively carry out its activities.

³ Informal group set-up with the agreement of Commissioner Gabriel and Vice President Vestager, and published on the Register of Expert Groups on 16 February 2021, pursuant to the provisions of Commission Decision C(2016) 3301 of 30.5.2016 establishing horizontal rules on the creation and operation of Commission expert groups.

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The three parties also have their individual roles and contributions to the development of the EOSC Federation.

The *European Commission* is a partner in the [EOSC European co-programmed partnership](#), whereby it co-develops the EOSC [Strategic Research and Innovation Agenda](#). It provides funding opportunities under the Horizon Europe programme to support the development of the EOSC Federation and the overall open science and FAIR research data ecosystem. It also owns and operates – through a public procurement contract – the ‘[EOSC EU Node](#)’, a fully operational platform providing access to a portfolio of professional-quality research services and resources and enabling with federating capabilities the development of the EOSC Federation.

The [EOSC Steering Board](#) is an expert group of the European Commission to strategically advise on EU policy for research data infrastructures and services and the alignment of EU and national policy developments and investments with the EOSC objectives. The expert group also supports the Commission in coordinating and implementing the EOSC as part of the ERA Policy Agenda, in line with the [Council conclusions of 26 November 2021](#) on the new ERA Governance. It is composed of representatives of the 27 EU countries and countries associated to Horizon Europe. It is co-chaired by a representative of the European Commission and a representative of the other members of the group.

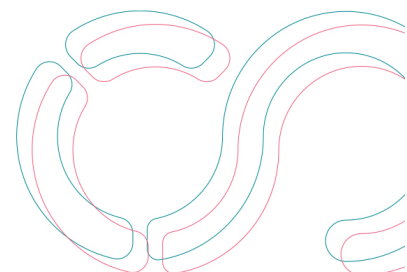
The [EOSC Association](#) was set up in July 2020 as an international non-profit organisation under Belgian law with the aim to provide a single voice for advocacy and representation for the broader EOSC stakeholder community. It is the European Commission’s partner in the EOSC European co-programmed partnership, whereby it co-develops the EOSC Strategic Research and Innovation Agenda. It currently has [166 members and 91 observers](#) from public organisations with a research mandate in Europe. Further to participating in the EOSC Tripartite Governance, the EOSC Association also provides the operational capacity of the current transitional EOSC Federation governance. This includes organising consultations of the broader community, coordinating and carrying out activities related to the build-up phase of the EOSC Federation, including the drafting of the present Handbook, carrying out communication activities related to the EOSC Federation, providing administrative support to groups related to the EOSC Federation (e.g. the group of the Handbook’s drafters, the EOSC Nodes Forum).

The EOSC Nodes

The EOSC Federation will consist of multiple “EOSC Nodes” that are interconnected and can collaborate to share and manage scientific data, knowledge, and resources within and across thematic and geographical research communities. The EOSC Nodes will be entry points for users to the EOSC Federation, with each node offering its own and possibly third-party services, including data repositories and accessing services.

The EOSC Nodes will need to comply with decisions, rules and policies that are agreed to be applied across the EOSC Federation. Other than that, each EOSC Node is fully autonomous to

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set its own rules and internal management of its consortium as long as they do not contradict those of the EOSC Federation. For example an EOSC Node may decide to set up additional Rules for Participation and/or separate access and use policies of the resources it offers through the Federation, or it may set up specific requirements for onboarding services.

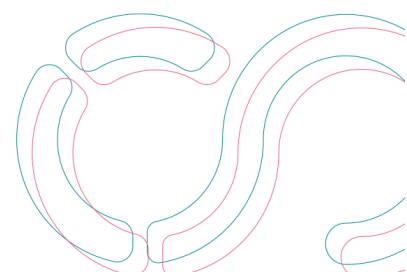
An EOSC Node can consist of a single organisation or it can consist of a consortium of organisations with its own internal governance structure. In the latter case there must be a 'coordinating' organisation within the consortium that will represent the Node in the **EOSC Nodes Forum (to be developed)**.

The EOSC Nodes Forum is an advisory body, the members of which are representatives of the EOSC Nodes. During the build-up phase of the EOSC Federation, organisations that are in the process of becoming Nodes (so called 'Candidate EOSC Nodes') are also Members of the EOSC Nodes Forum. The EOSC Nodes Forum advises the EOSC Tripartite Governance and the EOSC Association on issues related to the EOSC Federation activities and priorities.

2.2 Responsibilities of the EOSC Federation bodies

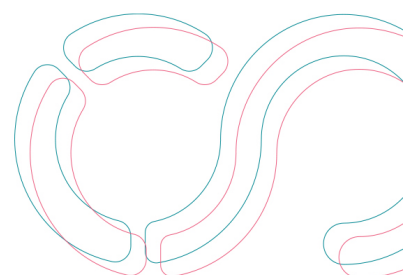
During the current, build-up phase of the EOSC Federation, the EOSC Federation bodies, ie the EOSC Tripartite governance and the EOSC Nodes Forum, will develop, under their respective roles, the key elements of the EOSC Federation, such as:

- **Federation strategy:** defining the long-term objectives of the EOSC Federation and the roadmap for achieving them.
- **Membership:** selection criteria and process for enrolment of new Nodes, Nodes' ongoing obligations, compliance measures, removal and mechanisms for appeal, possible membership fees.
- **Federated services:** what common services will be implemented across the EOSC Federation and what are the requirements for the Nodes when participating in federated services. These can include e.g. a common EOSC AAI, a common catalogue of EOSC resources etc.
- **Technical standards and requirements:** which technical standards will be part of the EOSC Interoperability Framework and what the technical requirements will need to be fulfilled by the Nodes when joining the Federation, e.g. cyber-security, PIDs etc.
- **Federation policies,** for example a security policy, ethics policy, or Rules for Participation and policies related to the access and use of resources that are provided across the Federation.
- **Monitoring:** what monitoring mechanisms the Federation will implement.
- **Collaborations:** establishing partnerships or other forms of cooperation with other organisations in or outside Europe.



- **Governance:** what should be the characteristics of the bodies of the eventual EOSC governance, their roles and the relations amongst each other.
- **Service Level Agreement (SLA),** including the terms of the service expected from providers and precautions and actions to be undertaken in the case the terms of the SLA are not met.

The EOSC Federation bodies will develop these elements in close cooperation with and consultation of the wider EOSC stakeholder community.



3 Operational structure and responsibilities

3.1 Operational tasks across the Federation

The day-to-day operations of the EOSC Federation during the build-up phase include the following tasks:

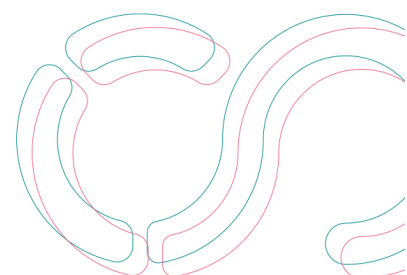
- Communicate to the stakeholder community about ongoing activities and progress of the EOSC Federation and decisions made by the Tripartite Governance.
- Contribute to and support the development of the procedures for enrolling Nodes in the Federation and of the Federation's common policies and technical standards.
- Coordinate and support the EOSC candidate Nodes in joining the Federation.
- Support the activities of the EOSC Node Forum,
- Establishing and supporting working and stakeholder groups to further develop the EOSC Federation
- Support the activities of the EOSC Tripartite Governance.
- Represent the EOSC Federation governance in discussions with the EOSC Nodes and with external stakeholders.
- Carry out the administration of the applications by candidate EOSC Nodes
- Assess the technical compliance of candidate EOSC Nodes to join the Federation.
- Maintain the web presence of the EOSC Federation
- Promoting the EOSC Federation in Europe and internationally.

Once an operational EOSC Federation is put in place, additional tasks will need to be carried out, such as:

- Measuring and reviewing the performance of the Federation against agreed objectives.
- Coordinating the EOSC Federation Interoperability Framework and reviewing compliance of the EOSC Nodes.
- The preparation and management of the contracts with the EOSC Nodes
- Gathering monitoring data of the EOSC Federation
- Coordinate the technical implementation of the Federation and provide technical advice and recommend tools to members of the Federation and those who plan to join it.
- Coordinating the EOSC Federation on a daily basis including coordinating the legal and policy framework within EOSC Federation and reviewing compliance of the EOSC Nodes with the legal and policy framework of the EOSC Federation.

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3.2 EOSC Nodes

An EOSC Node will be typically formed by multiple research institutes, universities and other stakeholders with a common geographical (European, regional or national) or thematic scope. A Node will support a thematic, regional or national community, and represent, coordinate, operate and maintain resources made available to the EOSC Federation. The resources that a Node should provide or contribute to are defined in Chapter 4.

3.2.1 Application process to become an EOSC Node

The application process for organisations to become EOSC Nodes will be developed during the build-up phase of the EOSC Federation and decided by the EOSC Tripartite Governance.

This process should also specify the eligibility and evaluation criteria for an organisation that is interested in operating an EOSC Node ('EOSC Node Host'). These criteria should be in line with the basic '[Requirements for EOSC Nodes](#)' that have been developed by the EOSC Tripartite Governance, and will be further formalised as the "Rules of Participation for EOSC Nodes".

It should also specify how the enrolment of an EOSC Node would be formalised. This can take the form of an 'EOSC Collaboration Agreement' that is signed by the organisation ('EOSC Node Host') that represents the consortium of this Node.

3.2.2 Operations

An EOSC Node represents a specific community of reference (national, regional, or thematic), or large collaborations at European level (e.g. e-infrastructures, science clusters, etc.), and onboards a set of resources to the Federation (the "EOSC Federated Resources") for which it is responsible. These resources may be operated by the Node itself, by members of the community associated with the Node or by third-party providers. Regardless of the provider, EOSC Federated Resources must conform to the technical and operational requirements of the EOSC Federation, which include the Interoperability Framework and Rules of Participation for EOSC Federated Resources. Compliance and monitoring procedures, agreed among the parties, will be put in place to ensure conformity with the requirements set out in the Node's EOSC Collaboration Agreement. A non-conforming Node will be asked to address any issues identified and may be subject to suspension from the Federation.

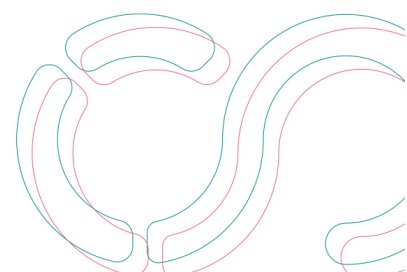
In addition, EOSC Nodes are expected to collaboratively deliver federating capabilities to augment their offer to EOSC users.

3.2.3 Roles for EOSC Nodes

In order to facilitate the interaction of the Node with the Federation, each Node must nominate a number of persons in the following roles:

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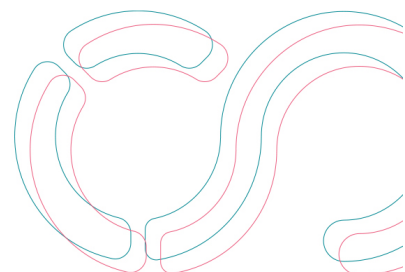


1. A **Coordinator** who represents the Node in the Federation.
2. An **Operation Manager** who is the contact person with the Operations Team of the Federation on operations.
3. A **Technical Coordinator** who is the contact person with the Technical Coordination Team of the Federation on technical issues (mainly IT issues).
4. A **Security Officer** who is the contact person for all security related issues.
5. Thematic Nodes will nominate a **Scientific Officer** who represents the Node's scientific content.

The Node will nominate the persons in these positions once the Node has been accepted to join the Federation and will communicate their names to the Operations Team of the Federation.

4 References

- [1] <https://www.greatproject.eu/wp-content/uploads/2024/04/D4.2-Final-Governance-Requirements-and-Endorsed-Governance-Scheme.pdf>

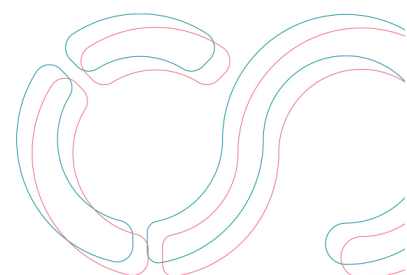


5 Annexes

5.1 Definitions

The EOSC Federation is under development and therefore many terms are not yet clearly defined. The following definitions explain the concepts and vocabulary used in the EOSC Federation Handbook. These definitions aim to concisely describe the meaning of the terminology used.

- **EOSC User:** Anyone who is granted access to the EOSC Federation resources based on the recognition of his/her identity by a service provider registered with the EOSC AAI system.
- **Resource:** Services, catalogues, digital research objects (e.g. data, software), training resources, infrastructure and other assets that may be available in an EOSC Node and offered in the EOSC Federation.
- **Resource Provider:** an organisation making a Resource available.
- **EOSC Resource Provider:** an organisation making a Resource available to the EOSC Federation, which resource is then called an “EOSC Federated Resource”
- **EOSC Federation Platform:** A reference architecture that can be implemented by each Node of the federation for the operation of their services and resources.
- **EOSC Node:** An organisation complying with the EOSC Federation policies and legal framework, working at local, national, regional, thematic or European level. An EOSC Node offers added value resources to the EOSC Federation and delivers federating capabilities in collaboration with other EOSC Nodes. Each EOSC Node has its autonomy, its own governance model and an offer in terms of resources. It operates its own platform, complying to the technical framework, and the EOSC Federation Platform architecture.
- **EOSC Node Host:** The legal entity representing an EOSC Node, and entering into the EOSC Collaboration Agreement.
- **EOSC Federated Resources:** resources that an EOSC Node shares with the EOSC Federation. (Such resources have previously been called “EOSC Exchange”.)
- **EOSC Interoperability Framework (IF):** An extensible framework of guidelines that acts as the glue to support the interoperability and composability of EOSC Federated resources. The EOSC IF is a reference framework to promote standards and best practices but offers the freedom to providers to develop and operate provider-specific implementations while conforming to the EOSC IF guidelines and standards.
- **EOSC Federation:** a network of EOSC Nodes.
- **EOSC Tripartite Governance:** The strategic coordination between the EU (represented by the EC), the Member States and Associated Countries represented by the EC Expert



Group ('EOSC-Steering Board'), and the EOSC Association (represented by EOSC-A Board).

- **EOSC Tripartite Group:** The group of appointed representatives of the three parties of the EOSC Tripartite Governance.
- **Onboarding Resources in an EOSC Node:** For a resource provider to *onboard* resources in an EOSC Node means to integrate its resources into an EOSC Node. The provider selects the most appropriate node based on the characteristics of the resource. For example, if a provider has a domain-specific data repository, it may choose a thematic node that best represents and serves that domain.
- **Enrolling an EOSC Node:** For the EOSC Federation to *enrol* a node means to register and integrate it into the EOSC Federation. Once a node has been enrolled, it shares its resources, which can include resources provided by the node itself or by resource providers onboarded on the EOSC Node.
- **EOSC Thematic Node:** Communities that are working in a specific scientific domain of research or with specific techniques. A technique can cover a large number of scientific domains, e.g. photon sources.

5.2 How the Handbook has been written

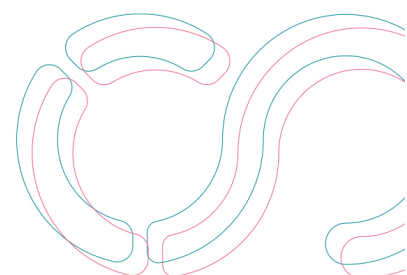
The EOSC Federation Handbook (or "Handbook" for short) is being written collaboratively by a team of Writers, Reviewers and Editors. The Editors' team is led by Andy Götz (EOSC Association and ESRF) and is supported by Mark Dietrich (EGI) and Miguel Rey Mazón (TU Graz) from the EOSC Focus project, coordinated by the EOSC Association⁴. The final version will be proposed for endorsement by the EOSC Tripartite Governance, which consists of the European Commission, the EOSC Steering Board and the EOSC Association.

6 Contributors

The following groups of people contributed to the Handbook:

1. **Writers** - Abdulrahman Azab (Sikt/Sigma2), Susanne Blumesberger (Uni Wien), Korbinian Bösl (Uni Bergen), Sally Chambers (DARIAH-EU), Helen Clare (JISC), Oscar Corcho (UPM), Matthew Dovey (JISC), Annika Glauner (ETH Zurich), Petr Holub (BBMRI-ERIC), Emma Lazzeri (CNR), Josefine Nordling (CSC), Jana Pavlic-Zupanc (BBMRI-ERIC), Nanette Rissler-Pipka (MWS), Martino Romaniello (ESO), Davide Salomoni (INFN), Diego Scardaci (EGI), Carlos Oscar Sorzano (Instruct-ERIC), York Sure-Vetter (NFDI), Jonathan Tedds (ELIXIR), Mark van de Sanden (SURF), Kannan Venkatesh (ICHE), Alen Vodopivec (CESSDA).

⁴ See <https://eosc.eu/eosc-focus-project> for more information.



2. **Reviewers** - Victoria Dominguez Del Angel (INRIA), Daniel Garijo (UPM), Natalia Galica (NCN PL), E. Gonzalez (UPM), Paolo Manghi (OpenAire), Peter Maccullum (ELIXIR), Tanja Maier (GÉANT), Jana Pavlic-Zupanc (BBMRI-ERIC), Tommi Suominen (CSC), Eirini Xemantilotou (Instruct-ERIC).
3. **Editors** - Andy Götz (EOSC-A + ESRF), Bob Jones (EOSC-A + CERN), Mark Dietrich (EGI/EOSC Focus), Miguel Rey Mazón (TU Graz/EOSC Focus).

7 Process

The process of writing is being done one chapter at a time in the following steps:

1. In the first step, the Writers prepare a first draft of the chapter based on the pre-agreed sections. The contributions are discussed in weekly meetings with the Editors.
2. Based on the first draft, the Editors make an improved draft which flows more smoothly, taking care to avoid repetitions and inconsistencies. This second draft is submitted to the Writers to check and comment.
3. Following this, the Reviewers are requested to review the draft and comment on it. Their comments are discussed in a common meeting where it is agreed upon how to integrate them.
4. The Editors prepare a new draft which is then submitted to the EOSC Tripartite Group (made up of representatives of the European Commission, the Member States and the EOSC Association) for comments. The Editors integrate the comments from the Tripartite Group into a consolidated version.

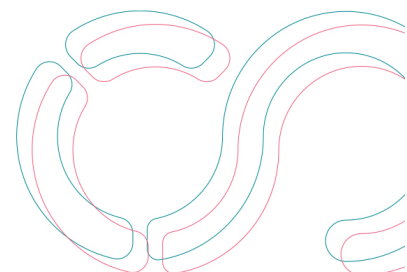
After following the above steps for Chapters 1-3 (see below), these chapters will be presented to the EOSC-A members and the wider EOSC community in September 2024 for an open consultation. The resulting document will be presented at the EOSC Symposium (Berlin, 21-23 October 2024), and it is scheduled to be accepted by the Tripartite Governance at the 7 November European EOSC Tripartite event in Budapest.

Building on the feedback from the broader community and from the Tripartite Governance, Chapters 1-3 will be revised. The process described above will also proceed for Chapters 4 and 5, reflecting the framework of Chapters 1-3 (with revisions).

The present document constitutes the first iteration in the development of the EOSC Federation Handbook. This version of the Handbook focuses on the period covering up to the end of 2027, when the current Framework Programme Horizon Europe will finish; more specifically, it covers the build-up phase of the EOSC Federation during 2025-2026 ("Phase 1"). During this period, the goal is to demonstrate how the EOSC Federation could function with a limited budget, and to define the expectations from participating organisations who will be expected to finance their contributions using their own resources (national, regional, thematic; public or private, etc.). Although the Handbook makes recommendations about the components that should be put in

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place to ensure a successful transition for 2027 and beyond, at the time of writing (2024) there is not sufficient knowledge to determine the future structure univocally. The results of this phase will establish the base on which a long-term, sustainable plan for the EOSC Federation can be based, and the Handbook will be continuously updated as agreement on governance, governing structure, structure of the EOSC Federation, etc., and the timeline to achieve all necessary intermediate steps, is reached by the relevant stakeholders.

