

Minimum Requirements for a Project Charter

Module 1: Introduction & Template Overview

Topic 1: Understanding the Charter Structure



What is the Project Charter?

The EOSC Federation Project Charter is your Node's application for enrolment. Think of it as both a strategic positioning document and a commitment contract.

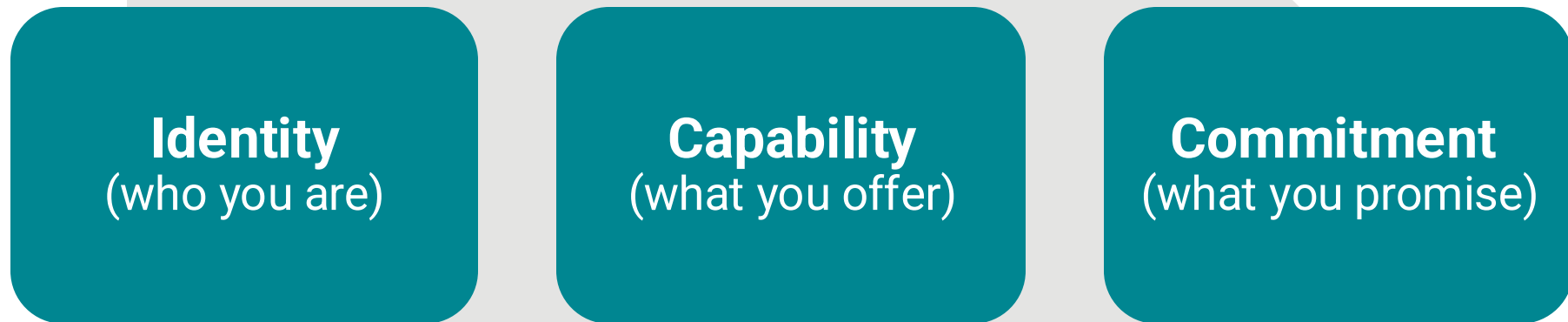
The Charter serves three audiences:

1. EOSC Association evaluators: They assess whether your Node is ready to join the Federation.
2. Potential partner Nodes: They evaluate whether to collaborate with you on multi-Node use cases.
3. Your own institution: The Charter formalises your organisation's strategic commitment to EOSC.

Tip: Evaluators don't just assess technical capability. They assess your Node's value to the Federation and your capacity to deliver on commitments.

The Ten-Section Structure

The Charter Template Follows a Logical Progression



Maximum length: 13 pages total across all sections.

The Ten-Section Structure

Find the Charter Template here:
https://eosc.eu/wp-content/uploads/2025/11/20251103_EOSC-Tripartite-Governance_Enrolment-call-documents.pdf



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The Ten-Section Structure

Section 1: Project Summary

- Length limit: Up to 300 words
 - Purpose: Concise overview of the entire Charter
 - This is your elevator pitch. In 300 words, synthesise your Node's services, stakeholder benefits, and EOSC alignment.
- Module 8 provides a synthesis template to help you draft this efficiently.

Draft last! – When all other sections are complete

1. PROJECT SUMMARY

Maximum 300 words.

This section should clearly articulate the primary purpose of your organisation's participation in the EOSC ecosystem. Describe how your organisation's activities will support the Federation's overarching mission to foster collaboration, and facilitate seamless access to FAIR data and services across the ecosystem. Define the project scope, main goal, needs addressed and key benefits. Include specific resources that will be made available to the Federation, Node core functions and

Describe the thematic, disciplinary, or technical scope of your organisation's activities. Describe how your organisation will contribute to the EOSC ecosystem, such as by providing high-value FAIR data, EOSC interoperability framework development, technical infrastructure, research services, supporting training programs or developing standards, and community coordination.

The Ten-Section Structure

Section 2: Value Proposition

2. VALUE PROPOSITION

Maximum 1 page.

What is the value proposition of your organisation to the EOSC Federation? Identify specific challenges or gaps in the EOSC ecosystem that your organisation aims to address by joining the Federation (e.g., lack of data hosting, integrating federating capabilities, need for specialised computing capabilities, interoperability framework development, cross-discipline scientific use cases/workflows). Who are the beneficiaries of your organisation's contribution to the EOSC Federation such as Research Institutions and Universities, public sector bodies, research user community, citizens and society.

Clearly define the needs addressed, key benefits, target user audiences (e.g., researchers, institutions, policymakers, private sector) and how your organisation will better meet their needs as part of the Federation. What unique capabilities does your organisation offer? Highlight specialised infrastructure, tools, expertise, or geographical focus that differentiates your organisation from others. Any links to other European Common Data Spaces should be mentioned.

- Length limit: Up to 1 page
- Purpose: Strategic positioning and differentiation
- Questions to answer:
 - What unique value does your Node bring to EOSC Federation?
 - Which stakeholder groups benefit from your Node's existence?
 - What makes you different from other Nodes (geographic, thematic, technical, community)?
 - How does your Node advance EOSC strategic objectives?
- ❑ First-wave insight: Generic claims like "we provide excellent services" don't differentiate. Specific positioning like "national AAI integration expertise" or "pan-European life science coordination" does.
- ❑ Module 2 teaches value proposition development using multi-stakeholder frameworks.

The Ten-Section Structure

Section 3: Services & Repositories

- Length limit: Up to 2 pages
- Purpose: Catalogue what you offer with evidence of operational maturity.
- Mandatory format: Table with these columns:
 - Service ID
 - Description
 - Access Policies
 - Federation Contributions
 - Technology Readiness Level (TRL)

Module 3 guidance and TRL assessment

Critical requirement (General Criterion #4):
 All services must demonstrate Technology Readiness Level 7 – operational deployment in relevant environment with real users.

3. REPOSITORIES AND SERVICES DELIVERED

Maximum 1 page.

Describe the repositories/services (core functions, exchanges) to be made available by the new Node. Include the access policies for these repositories/services (e.g., specify the type of users who can access them: are they from your organisation only or from your country/discipline only or European-wide?).

Describe whether you intend to use or complement already existing federated capabilities or whether these services are a new addition to the Federation capabilities. See the EOSC Federation Handbook for details.

The resources made available to EOSC users via an EOSC Node must operate at minimum at Technical Readiness Level (TRL) 7 (self-assessment). (General criteria #4)

Service ID	Service Description	Access Policies to the Service	Federation Contributions & Value to Users	TRL

FAQs: Are TRL 6 services acceptable? Yes, IF you provide a credible roadmap to TRL 7 during the build-up phase and explicitly note they won't be in the Federation catalogue until TRL 7 is achieved.

The Ten-Section Structure

Section 4: Use Cases

- Length limit: Up to 3 pages
- Purpose: Demonstrate practical value to research communities
- Mandatory format: Table including:
 - Use Case ID
 - Name
 - Description (250-500 words per use case)
 - Services Utilized
 - Timeline
 - Collaborating Partners
- Requirements:
 - 3-5 use cases recommended
 - At least one must involve another EOSC Node (General Criterion #6)
 - Each use case must demonstrate real research problems solved, not abstract technical possibilities

☐ Module 4 supports use case design

4. USE CASES

Maximum 3 pages.

Propose the development of at least one scientific multi-Node use case or one use case realising a concrete contribution to the federating capabilities. (General criteria #6)

This section should define the expected use cases that will be delivered to the users and to the organisations participating in building the EOSC Federation. Use cases represent the high-level capabilities that are critical to delivering the expected benefits to stakeholders and users. Use cases should demonstrate the added value of the EOSC Federation, for example developing multi-node scientific workflows, scaling service provision, sharing

- In Scope
- *This section should identify what it is considered as in scope for the project, i.e., the outputs that the project*
- WIL Out of Scope
- OPP *This section should identify what it is considered as out of scope for the project, i.e., that the project will NOT deliver during the build-up phase (and beyond).*
- Clea
- Fede *Specify what your Node will not include to avoid confusion and manage stakeholder expectations. This is essential to prevent scope creep.*
- The
- asse *Examples include:*
- Stak *Excluded Activities: Identify specific services, activities, or tools that your organisation will not be responsible for.*
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This is the most critical section. Around 40–50% of the Charter focuses on use cases, reflecting evaluator priorities.

The Ten-Section Structure

Section 5: Technical Compliance

5. COMPLIANCE WITH TECHNICAL REQUIREMENTS

Maximum 2 pages.

Show how the organisation or consortium plans to meet the minimum requirements to become a Node, including governance and technical readiness, in particular integration in the [EOSC Federated AAI](#) and exposure of their resources through the common [EOSC catalogue](#). Explain how the Node Core Capabilities will be implemented.

Please start with a sentence confirming to agree to comply with the mandatory technical specifications regarding integration in the EOSC Federation. (General criteria #3, 50 words.)

Tip: If you're starting from no institutional AAI, realistic EOSC AAI integration timeline is 12-18 months. Don't claim "Month 3" – evaluators know better.

- Length limit: Up to 2 pages
 - Purpose: Demonstrate Federation integration readiness
 - Address three technical requirements (General Criterion #3):
 1. AAI Integration: Authentication & Authorization Infrastructure
 - a. Technical approach (SAML, OAuth, OpenID Connect)
 - b. Integration timeline (realistic: 6-12 months)
 - c. Resource allocation
 2. Service Catalogue Registration:
 - a. Metadata preparation status
 - b. Registration timeline
 - c. Standards compliance
 3. Core and Generic Capabilities:
 - a. Which Core Capabilities you support (mandatory baseline)
 - b. Which Generic Capabilities you offer (value-added services)
- ☐ Module 5 covers technical integration planning.

The Ten-Section Structure

Section 6: Dependencies & Risks

- Length limit: Up to 1 page
- Purpose: Demonstrate project management maturity through risk awareness
- Two components:
 1. External Dependencies: What do you rely on?
 - a. Partner Node commitments
 - b. Third-party service providers
 - c. Institutional support
 - d. Policy frameworks
 - e. Funding sources
 2. Risk Assessment: What could go wrong?
 - a. Identify risks across domains (Technical, Operational, Governance, Financial, External, Strategic)
 - b. Rate Impact and Likelihood
 - c. Define mitigation strategies

☐ Module 6 applies ISO 31000 frameworks with a 25-risk inventory adapted for EOSC Nodes

6. EXTERNAL DEPENDENCIES & KEY RISKS

Maximum 1 page.

This section should describe any limitations, risks or restrictions that affect how the project can be managed and executed. These constraints could come from various sources — internal organisational factors, external environments, or specific project requirements such as EOSC EU Node dependencies — and may influence decisions on resources, timeline, technology, and scope. Identifying these constraints early on ensures that the project team can plan accordingly and address potential challenges proactively. Also list decisions and compliance related risks. Mention risks that arise both from the organisation as well as from the external (to the project or/and organisation) environments.

In the case where a separate document does not exist, then you can also include information related to security risks, document management risks, data protection risks, or other.

External Dependencies & Risks	Actions / mitigations measures	Deadline

Tip: Acknowledging risks strengthens your Charter. It demonstrates you've thought through challenges and have mitigation plans. Risk denial signals naivety.

The Ten-Section Structure

Section 7: Contributions/Deliverables

7. CONTRIBUTIONS [DELIVERABLES (INCLUDING DOCUMENTATION)]

Maximum 2 pages.

This section should identify the deliverables of the project and their respective contributors (where there is more than one) within the organisation. Deliverables can be tangible (such as documentation, software code, APIs) or intangible outputs created during the project. These deliverables are intended to be delivered to the project owner organisation. It is important to note that the deliverables may be produced by different partners within the organisation, each contributing specific components or outputs as part of the overall project.

Deliverable ID	Deliverable Name	Responsible	Deadline

- Length limit: Up to 1 page
- Purpose: Concrete commitments with accountability
- Deliverables are tangible, verifiable outputs you commit to producing:
 - "AAI integration operational by Month 9"
 - "Ten services catalogue-registered by Month 12"
 - "Multi-Node use case pilot completed by Month 18"
- **NOT** deliverables:
 - Activities: "Working on AAI integration"
 - Aspirations: "Aim to register services"
- SMART criteria apply:
 - Specific: Unambiguous definition
 - Measurable: Verification possible
 - Achievable: Resource-realistic
 - Relevant: Goal-aligned
 - Time-bound: Deadline specified
- ❑ Module 6 integrates deliverables with risk mitigation: HIGH/CRITICAL risks become mitigation deliverables.

The Ten-Section Structure

Section 8: Community Engagement

- Length limit: 1 page maximum
- Purpose: Demonstrate capacity for sustained participation (General Criterion #2)
- Address three dimensions:
 1. User Communication: How do you engage your research communities?
 - a. Newsletters, workshops, conferences, training
 - b. Frequency and formats
 2. Third-Party Onboarding: How do external services/organisations join your Node?
 - a. Application procedures
 - b. Evaluation criteria
 - c. Technical requirements
 - d. Timeline expectations
 3. Success Measurement: How do you know engagement is working?
 - a. Key Performance Indicators (KPIs)
 - b. Active users, onboarded services, training participants, community contributions

☐ Module 7 designs sustainable engagement strategies.

8. COMMUNITY ENGAGEMENT

Maximum 1 page.

Describe how the organisation/consortium operating an EOSC Node intends to implement activities that enable the represented community to engage and participate in the EOSC Federation, which may include offering the capacity to onboard third-party resources. Define how the project will use the lessons learned from the current wave of Nodes.

Please start with a short paragraph confirming the capacity or the clear plan to develop the capacity to implement activities that enable the broader represented community to engage and participate in the EOSC Federation. (General criteria #2, 100 words.)

Tip: Avoid proposing entirely new, resource-intensive mechanisms (e.g., "annual 500-person conference") without demonstrating organisational capacity. Instead: Build on existing programs and demonstrate track record.

The Ten-Section Structure

Section 9: Timeline/Milestone

9. TIMING AND MILESTONES

Maximum 1 page.

This section should list the important project points in time of the project lifecycle (i.e., milestones) for events or project deliverables. The list can include an indication regarding the foreseen timing of the repositories/services made available, the major project phases (e.g., the PM phases of Initiating, Planning, Executing, Closing), as well as both project and project management deliverables (e.g., the Project Work Plan and the date it's expected to be finalised).

After deployment of a service, indicate when documentation explaining the service to users and or administrators will be made available.

ID	Milestone Description	Target Delivery Date

- Length limit: Up to 1 page
- Purpose: Realistic implementation roadmap
- Identify 8-12 major milestones marking significant progress:
 - "AAI Integration Testing Complete"
 - "Initial Five Services Catalogued"
 - "Multi-Node Use Case Pilot Launch"
 - "Inaugural Community Assembly"
- Sequencing principles:
 - Respect dependencies (AAI must precede service availability via AAI)
 - Include buffer time (10-20% contingency)
 - Align with Section 4 use cases and Section 7 deliverables
- ❑ Typical timeline: First-wave Nodes show 12-24 month implementation periods from enrollment to full operational capability.
- ❑ Module 8 integrates timeline planning across all previous modules.

The Ten-Section Structure

Section 10: Contacts

- Length limit: Up to 300 words maximum
- Purpose: Designate accountability (General Criterion #5)
- Five mandatory roles:
 - Coordinator – Overall Node leadership, EOSC Association liaison
 - Operations Officer – Technical operations, service delivery
 - Cybersecurity Officer – Security compliance, incident response
 - Legal Officer – MoU negotiation, GDPR compliance, contracts
 - Communications Officer – Community engagement, outreach
- For each role, provide:
 - Name
 - Institutional affiliation
 - Contact email
 - Brief qualification summary (2-3 sentences)

☐ Module 8 covers role designation.

10. CONTACTS

Maximum 300 words.

Describe your organisational structure of the project team with roles and responsibilities, and resources involved.

Applicants must commit at least five individuals involved for the duration of the build-up phase, including the roles of coordinator, operations officer, a legal officer, a cybersecurity officer and a communications officer (General criteria #5). Please start with a sentence explaining how many individuals are involved and assign names to all roles in the subsequent table.

Role	Name	Email
Coordinator		
Operations Officer		

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Tips:

- **One person can hold multiple roles, especially for smaller Nodes.**
- Common: Coordinator also serves as Communications Officer.
- **Not acceptable:** "TBC" (to be confirmed) without a credible recruitment plan and completion deadline.

The Templates Logic

The sections' sequence forces you to think strategically:

- value proposition *before* technical details,
- use cases *before* services (to ensure services align with real needs),
- risks *before* deliverables (to ensure commitments are risk-informed).

Sections 1-2: Who are you? (Identity and value)



Sections 3-5: What do you offer? (Capabilities and technical readiness)



Sections 6-8: How will you deliver? (Planning, risk management, engagement)

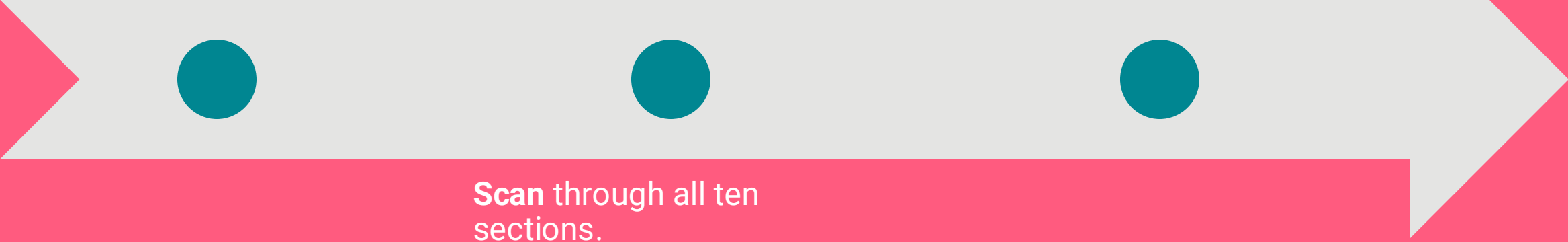


Sections 9-10: When and who? (Timeline and accountability)

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In your notes, document:

- Which 2-3 sections do you already have content for?
- Which 2-3 sections will require most development effort?
- What's your biggest question or concern about the Charter?



Scan through all ten sections.

Thank you!