

Minimum Requirements for a Project Charter

Module 1: Introduction & Template Overview

Topic 2: Seven General Criteria for Evaluation



How Evaluation Works

All seven General Criteria must be met for your Node to be considered for enrollment. They function in two ways:

- 1. Threshold requirements:** Pass/fail – you either meet the criterion or you don't.
- 2. Quality indicators:** Among applications that meet all criteria, evaluators assess comparative strength.

Understanding this dual function helps you prioritise effort.

The Seven Criteria

General Criterion #1: Separate Node Identity and Distinct Value Proposition

Your Node must be a discrete organizational entity with its own governance, not merely a project for department within a larger Node.

What evaluators ask:

- Is this Node genuinely distinct from existing Nodes?
- Does it duplicate capabilities already available in the Federation?
- Would the Federation lose something valuable if this Node didn't exist?

Charter evidence:

- Section 2: Clear articulation of unique positioning
- Section 4: Use cases showcasing capabilities unavailable elsewhere

Successful proposals must meet the following criteria:

- #1 Applicants must be interested in enrolling as a separate Node.

Remark: accordingly, this call excludes organisations that are interested **only** to onboard resources to an EOSC Node. On the other hand, EOSC Nodes may at any point in time choose to onboard specific resources to/from other EOSC Nodes.

Remark: to be addressed in the application form available in the submission platform.

Tip: All Nodes have value propositions, but strength of differentiation varies significantly. Invest effort here.

The Seven Criteria

General Criterion #2: Community Engagement Capacity and Third-Party Onboarding

Demonstrated capacity (not just willingness) to engage user communities and onboard external services/organisations.

What evaluators ask:

- Can this Node sustain engagement long-term, or are mechanisms one-off activities?
- Does the Node have institutional resources for third-party onboarding?
- Is engagement bidirectional (listening and responding) or merely broadcasting?

Charter evidence:

- Section 8: Specific engagement mechanisms with realistic resource requirements
- Section 8: Third-party onboarding pathway with capacity limits
- Section 7: Engagement-related deliverables
- Section 10: Communications Officer designated

- #2 Applicants must have the capacity or have a clear plan to develop the capacity to implement activities that enable the broader represented community to engage and participate in the EOSC Federation.

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Remark: to fulfil its role as a community gateway to the EOSC Federation, in addition to

Tips

DON'T Proposing resource-intensive activities (annual 500-person conference, comprehensive training programs) without demonstrating organisational capacity or budget.

DO Engagement sustainability and scalability separate strong from weak approaches.

The Seven Criteria

General Criterion #3: AAI and Catalogue Compliance

Commitment to integrate with EOSC Authentication & Authorization Infrastructure (AAI) and register services in EOSC Service Catalogue.

What evaluators ask:

- Does the Node understand AAI technical requirements?
- Is the integration timeline realistic?
- Has technical staff been identified for integration?

- #3 Applicants must agree to comply with the mandatory technical specifications regarding integration in the EOSC Federation, in particular regarding integration in the [EOSC Federated AAI](#) and exposure of their resources through (a) common [EOSC catalogue\(s\)](#).

Remark: to be addressed in the project charter section 5.

Charter evidence:

- Section 5: AAI integration plan with timeline, personnel, resources
- Section 5: Catalogue registration approach
- Section 6: AAI integration failure listed as risk with mitigation
- Section 7: AAI-related deliverables
- Section 10: Operations Officer designated

➤ **Timeline reality: First-wave Nodes report 6-12 months for AAI integration including testing. If you're starting from Level 1 (no institutional AAI), 12-18 months is realistic.**

➤ **Quality varies: Realism of timeline and resource allocation.**

The Seven Criteria

General Criterion #4: TRL 7 Services

All services must demonstrate Technology Readiness Level 7 – operational environment demonstration with real users.

TRL 7 definition:

- Operational deployment (not lab/test environment)
- Real users (not just internal testing)
- Documented use cases (actual usage, not hypothetical)
- Performance metrics (uptime, response times, user satisfaction)

What evaluators ask:

- Is the service operational NOW, or is TRL 7 projected?
- Are user testimonials or usage statistics provided?
- Can the service handle production workloads?

Charter evidence:

- Section 3: TRL column showing "7" or "6→7 by Month X"
- Section 3: Description includes operational evidence (user counts, usage patterns)
- Section 4: Use cases demonstrate actual (not hypothetical) application

- #4 The resources that applicants aim to make available to EOSC users via an EOSC Node must operate at minimum at Technical Readiness Level (TRL) 7.

Remark: TRLs are defined in the General Annexes of the [Horizon Europe Main Work Programme](#).

Remark: to be addressed in the project charter section 3.

TRL 6 acceptable? Yes, IF:

- You have 3-5 core services already at TRL 7 (demonstrates operational capability)
- TRL 6 services have credible roadmap to TRL 7 with timeline and resources
- You explicitly note TRL 6 services excluded from catalogue until TRL 7 .

Tip: Evidence comprehensiveness and credibility.

The Seven Criteria

General Criterion #5: Five Mandatory Roles with Named Individuals

Five specific organisational roles must be designated with actual named people (not "TBC").

The five roles:

1. Coordinator
2. Operations Officer
3. Cybersecurity Officer
4. Legal Officer
5. Communications Officer

What evaluators ask:

- Do designated individuals have appropriate expertise?
- Are roles distributed, or is one person holding all five?
- For unfilled roles, is the recruitment plan credible?

Charter evidence:

- Section 10: All roles with names, affiliations, contacts, qualifications
- Section 6/7: Deliverables assigned to roles showing workload distribution

- #5 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. Applicants must specify the names assigned to the aforementioned roles in their application.

Remark: to be addressed in the project charter section 10.

Remark: the build-up phase is an exploratory process whose duration will depend on the overall progress of its volunteer EOSC Nodes. In line with the list of minimal 'requirements for candidate EOSC Nodes' set out by the Tripartite governance, the resources shall be committed for at least 24 months, to ensure also a smooth transition to the operational phase as an EOSC Node.

- **Role plurality: Acceptable for one person to hold multiple roles (common for smaller Nodes).**
- **Typical: Coordinator + Communications Officer. But Operations + Cybersecurity typically need distinct individuals.**
- **Threshold criterion: Largely pass/fail. Either you've named people or you haven't.**

The Seven Criteria

General Criterion #6: Multi-Node Use Case

At least one use case must demonstrate collaboration with another EOSC Node.

What evaluators ask:

- Is this genuine collaboration (mutual dependency) or just coordination (parallel work)?
- Do both Nodes provide essential capabilities?
- Has the partner Node confirmed participation?

Charter evidence:

- Section 4: At least one use case with "Collaborating Partners" field listing another Node

Required attachment: Email from partner Node Coordinator confirming participation

- Section 4: Use case description explains what each Node contributes and why collaboration is necessary

- #6 Applicants must agree with existing Node(s) or other applicants to align on and propose the development of at least one scientific multi-Node use case or one use case realising a concrete contribution to federating capabilities.

Remarks:

- The proposed use cases must be described in the project charter section 4 that is part of the material submitted by the applicant.
- The other candidate Nodes or applicants involved in the development of proposed use cases must be mentioned in the project charter. In case they include applicants, the relevance of the use case in the application will be valid only if these other applicants also fulfil the application criteria.
- The project charter must include a timeline of realisation of the use cases, that is agreed upon with the involved organisations.

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Tips

- Partner coordination takes 4-6 weeks. Start early.
- Pay attention to depth and reciprocity of collaboration.

The Seven Criteria

General Criterion #7: MoU Willingness

Willingness to sign Memorandum of Understanding (MoU) with EOSC Association upon enrollment.

What evaluators ask:

- Has institutional leadership approved MoU signature?
- Does leadership understand MoU implications?

- #7 Applicants are willing to sign a [Memorandum of Understanding](#) (MoU) on preparing operational integration within the envisaged EOSC Federation.
Remark: to be addressed in the application form available in the submission platform.

Charter evidence:

- Explicit statement of MoU willingness (Section 2 or cover letter)
- Optional but helpful: Institutional endorsement letter

Threshold criterion: Binary yes/no. No quality differentiation.

Critical: Ensure institutional leadership (Rector, Director, VP Research) knows about and approves MoU commitment BEFORE Charter submission. Post-enrollment signature delays happen when Coordinators commit without institutional authorisation.

Where to Focus Your Effort

Pure threshold (just meet it)

- Criterion #7 (MoU): Binary, minimal effort
- Criterion #5 (Five roles): Binary, name people

Threshold & quality matters

- Criterion #1 (Value proposition): Quality varies significantly – INVEST HERE
- Criterion #2 (Engagement): Sustainability varies – INVEST HERE
- Criterion #3 (AAI/catalogue): Timeline realism varies
- Criterion #4 (TRL 7): Evidence quality varies – INVEST HERE
- Criterion #6 (Multi-Node): Collaboration depth varies – INVEST HERE

Tip: Don't spend equal time on all criteria. Criterion #1, #2, #4, and #6 separate strong applications from adequate ones.

Quick self-check. For each criterion, mark your Node's current status:

Criterion	Meets	Needs Development	Critical Gap
#1: Node identity			
#2: Engagement capacity			
#3: AAI/catalogue			
#4: TRL 7 services			
#5: Five roles			
#6: Multi-Node case			
#7: MoU willingness			

Critical Gap: Address before Charter submission.

Meets: You're ready for Charter development now.



Needs Development:
Realistic timeline is 3-6 months preparation.

Thank you!