

Minimum Requirements for a Project Charter

Module 3: Services & Repositories

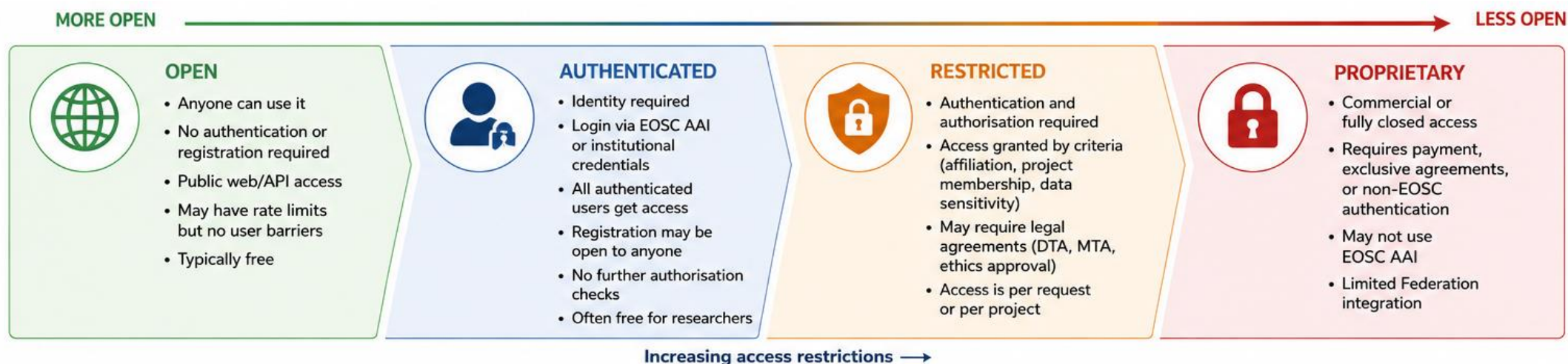
Topic 3: Access Policies and Federation Contributions



Access Policy Options

Every service/repository in your table must specify:
who can access it and **what** it contributes to the Federation.

The four access policy categories and their openness spectrum:



Access Policy Options – Open Access



OPEN

- Anyone can use it
- No authentication or registration required
- Public web/API access
- May have rate limits but no user barriers
- Typically free

When to use:



- ☐ Public data repositories (open datasets)
- ☐ Discovery/search services (catalogue browsing)
- ☐ Public documentation or knowledge bases
- ☐ Open-source tools/software downloads

Examples:

- "NARCIS Repository: Open access to Dutch research publications (CC BY licenses)"
- "Marine Data Catalogue: Public search interface, no authentication required"
- "Training Materials Repository: Open educational resources (CC0)"

Access Policy Options – Authenticated Access

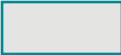
When to use:

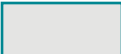


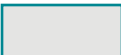
AUTHENTICATED

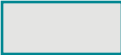
- Identity required
- Login via EOSC AAI or institutional credentials
- All authenticated users get access
- Registration may be open to anyone
- No further authorisation checks
- Often free for researchers



 Services requiring user identity (for support, tracking, fair use)

 Repositories with terms of use requiring acceptance

 Collaborative tools (need user accounts for sharing/versioning)

 Services with usage quotas per user

Examples:

- "Research Cloud Computing: Access via SURFconext (institutional authentication)"
- "Data Submission Service: EOSC AAI authentication required, open to all researchers"
- "Jupyter Hub: Institutional login, all authenticated users receive basic quota"

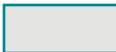
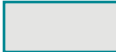
Access Policy Options – Restricted Access



RESTRICTED

- Authentication and authorisation required
- Access granted by criteria (affiliation, project membership, data sensitivity)
- May require legal agreements (DTA, MTA, ethics approval)
- Access is per request or per project

When to use:

-  Sensitive data repositories (health, personal, confidential)
-  Specialised infrastructure (limited capacity, competitive access)
-  Commercial or proprietary datasets with licensing
-  Services requiring training/certification before use

Examples:

- "Clinical Data Repository: Restricted to approved researchers with ethics board clearance and signed Data Transfer Agreements"
- "National Supercomputer: Restricted access via competitive project proposals"
- "Proprietary Drug Database: Licensed access for institutional subscribers"

Access Policy Options – Proprietary Access



PROPRIETARY

- Commercial or fully closed access
- Requires exclusive or institutional authentication
- May involve license fees
- Limited integration

When to use:



Note:
Most EOSC Nodes avoid Proprietary access in Charter Section 3.
If you list it, justify why it's valuable for Federation.

Use brokers for EOSC

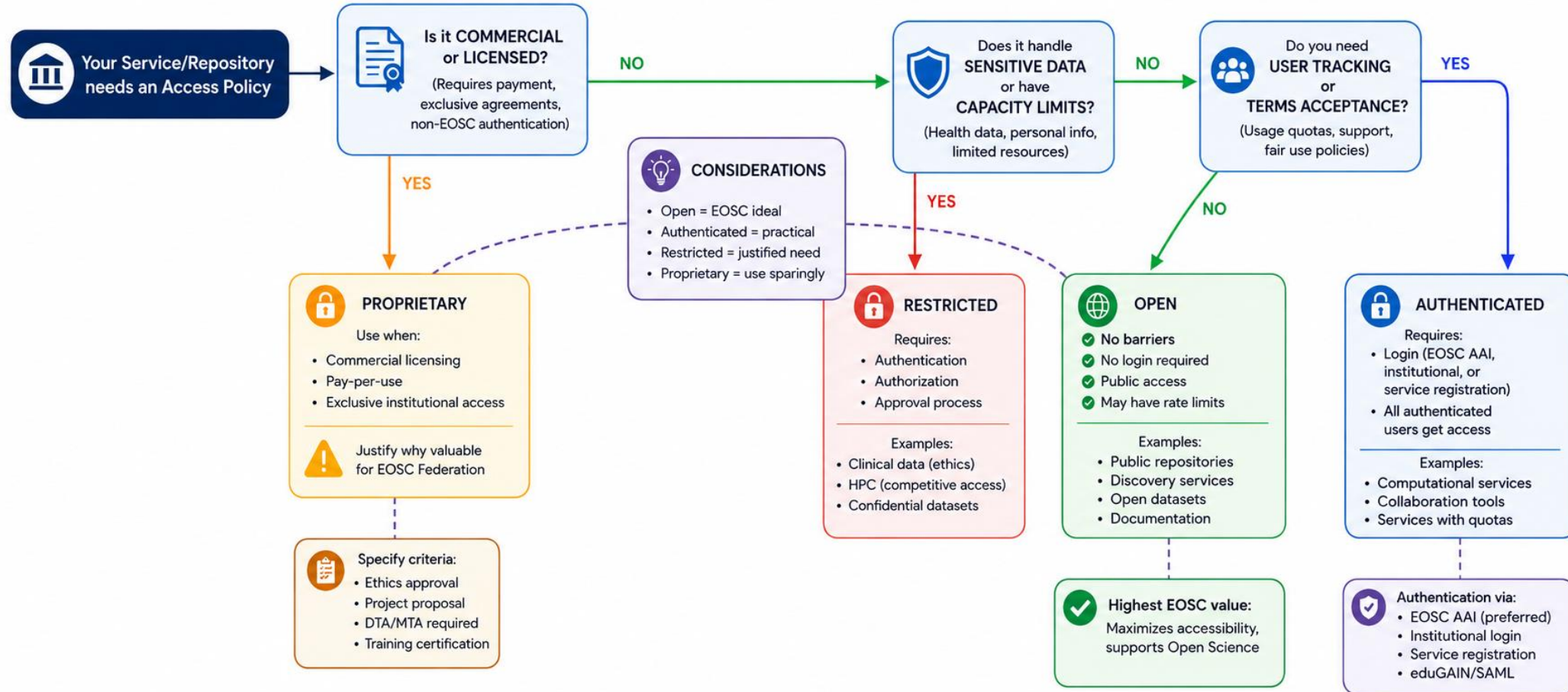
license fees

Services with exclusive institutional access only

Examples:

- "Proprietary Climate Model: Licensed access via institutional subscription (non-EOSC authentication)"
- "Commercial Genome Database: Pay-per-use API access"

Choosing the Right Access Policy



Federating Capabilities

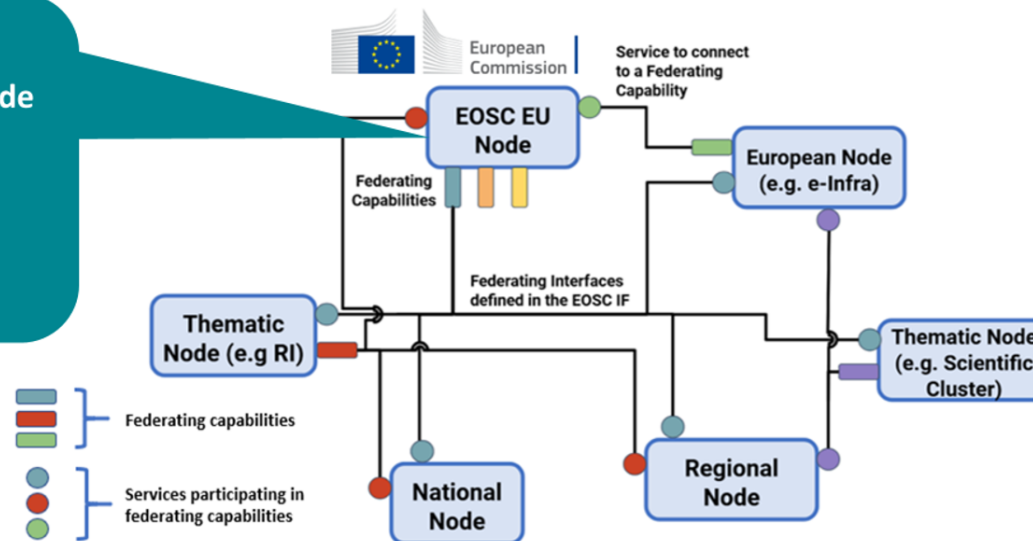
eOSC | Federation Building the Roadmap for 2026

Operational structure

- Evolution of federating capabilities and the interoperability framework

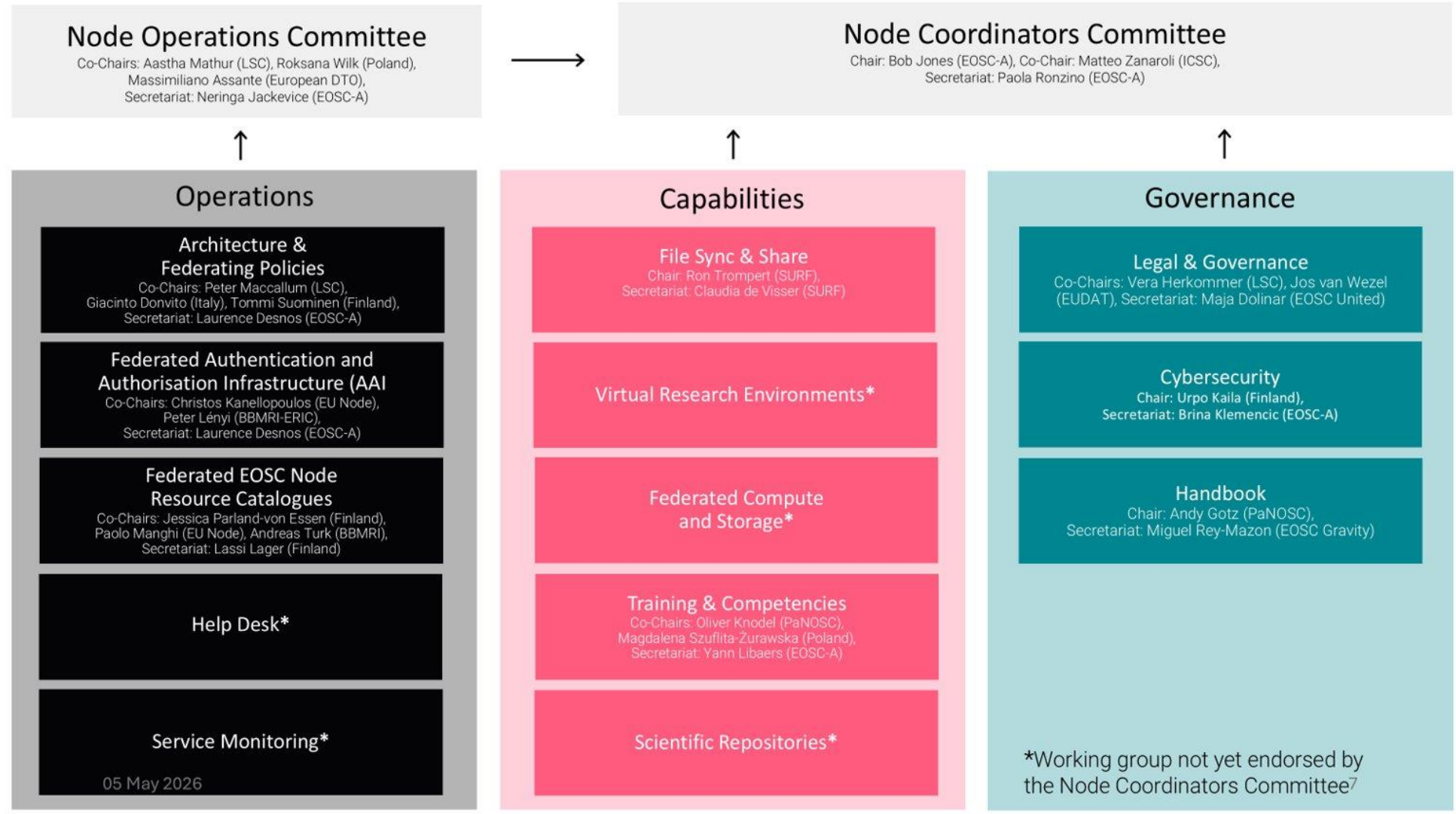
The EOSC Federation is dependent on the fed. capabilities operated as services by the EU Node

- Resource Catalogues & Registry services
- Fed. AAI
- Helpdesk
- Service Monitoring
- Etc.



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Federation-wide Infrastructure & Nodes Capabilities



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Federation Shared Infrastructure



Federated AAI

Single sign-on across all EOSC nodes — enabling seamless, policy-compliant access for researchers



EOSC Catalogue

Exposure of node services and datasets through the common EOSC resource catalogue with FAIR-aligned metadata



Helpdesk

Node-level user support integrated with the federation-wide helpdesk system, ensuring consistent service for the research community



Monitoring

Continuous service monitoring feeding into federation-wide dashboards to maintain transparency, reliability and SLA compliance

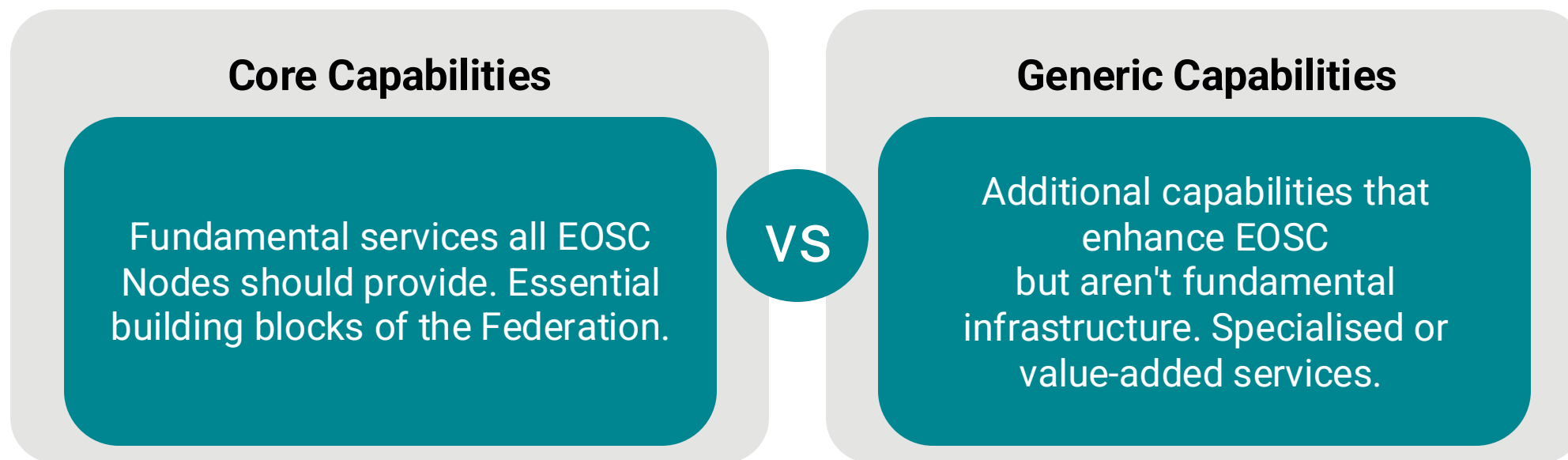


Service Mgmt System

Structured service management framework (FitSM) governing how node services are operated, improved and reported

Progressively being adopted by all nodes as part of enrolment and transition to production

Every service must specify which EOSC capability it provides.



Federation Contribution

Core Capabilities

Fundamental services all EOSC Nodes should provide.
Essential building blocks of the Federation.

	Core Capabilities
EOSC Core Capabilities	Data Repository - Store and preserve research data
	Compute - Provide processing/analysis resources
	Storage - Offer research data storage
	AAI (Authentication & Authorisation) - Federated identity
When to claim Core	Your service directly provides one of these four capabilities
	It's a primary offering, not incidental
Examples	Marine Data Repository → Core: Data Repository
	National HPC Service → Core: Compute
	Research Drive Cloud Storage → Core: Storage
	SURFconext Federated Login → Core: AAI

Federation Contribution

	Generic Capabilities
Common EOSC Generic Capabilities	Data Discovery - Search/find datasets across repositories
	Data Transfer - Move data between systems
	Workflow Orchestration - Automate research pipelines
	Generic Capabilities
When to claim Generic	Your service provides value-added functionality
	It enhances Core capabilities
	It's specialised for certain communities/use cases
Examples	Data Discovery Service → Generic: Data Discovery
	Jupyter Analysis Environment → Generic: Data Processing
	Workflow Engine → Generic: Workflow Orchestration
	DOI Minting Service → Generic: Persistent Identifiers

Generic Capabilities

Additional capabilities that enhance EOSC but aren't fundamental infrastructure. Specialised or value-added services.

Examples: Service → Capability Mapping

Example 1: Marine Data Discovery Service

Service function: Federated search across 15 oceanographic repositories

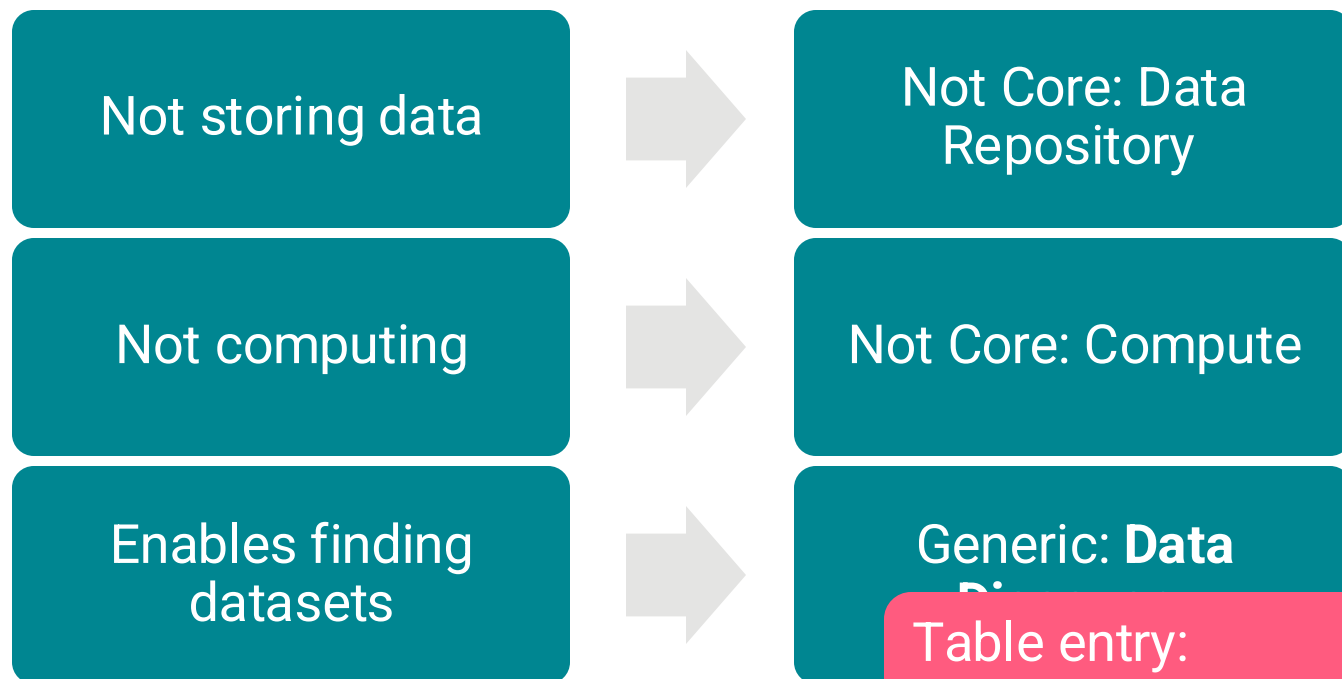
Mapping decision:

Table entry:
Federation Contribution: Generic Capability - Data Discovery

Examples: Service → Capability Mapping

Example 2: National HPC System

Service function: High-performance computing infrastructure for research

Mapping decision:Directly provides
processing resourcesCore: **Compute**Table entry:
Federation Contribution: Core Capability - Compute

Example 3: Metadata Catalogue

Service function: Searchable index of dataset descriptions (not datasets themselves)

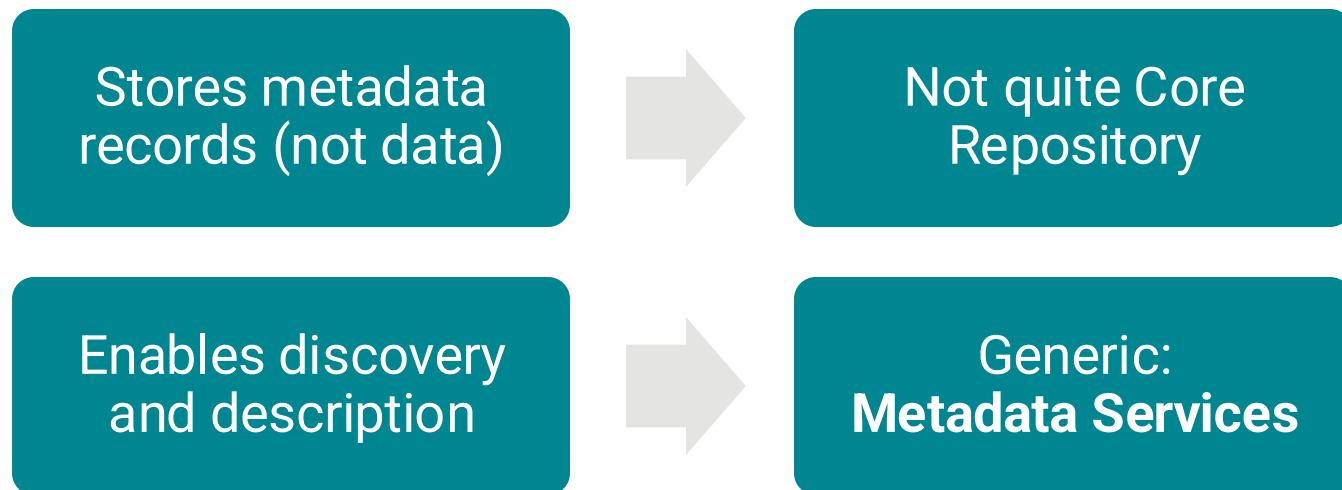
Mapping decision:

Table entry:
Federation Contribution: Generic Capability - Metadata Services

Examples: Service → Capability Mapping

Example 4: Research Cloud Storage

Service function: Cloud-based file storage and sync for researchers

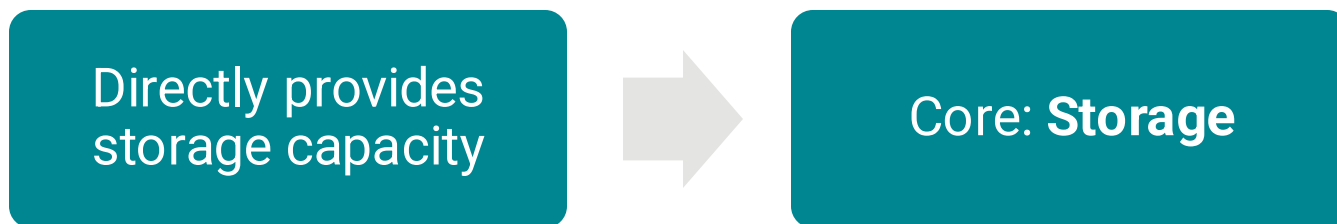
Mapping decision:

Table entry:
Federation Contribution: Core Capability - Storage

Can One Service Provide Multiple Capabilities?

Yes, but choose the PRIMARY capability for the table.

Example: Service: Research Data Repository with integrated analysis tools

Capabilities it provides:

- Data Repository (stores datasets)
- Data Processing (runs analyses)
- Persistent Identifiers (assigns DOIs)

Table entry:

Federation Contribution: Core Capability - Data Repository (primary function)

In Description column, mention:

"...with integrated analysis tools and DOI assignment"

Why primary only:

Table format has one capability column. Choose the most essential function.

Common Mistakes in Capability Mapping

- **Too Generic**

X

Federation Contribution:
"Research Support"

✓

Federation Contribution:
Generic Capability - Training
& Support

Why:
"Research Support" is vague.
Use taxonomy terms.

- **Claiming Core When It's Generic**

X

Jupyter Hub → Core
Capability: Compute

✓

Jupyter Hub → Generic
Capability: Data Processing

Why:
Jupyter provides specialised
processing (notebooks),
not general HPC compute
infrastructure.

Common Mistakes in Capability Mapping

- **Not Aligning with EOSC Taxonomy**

X

Federation Contribution:
"Machine Learning Platform"

✓

Federation Contribution:
Generic Capability - Data
Processing (ML tools)

Why:

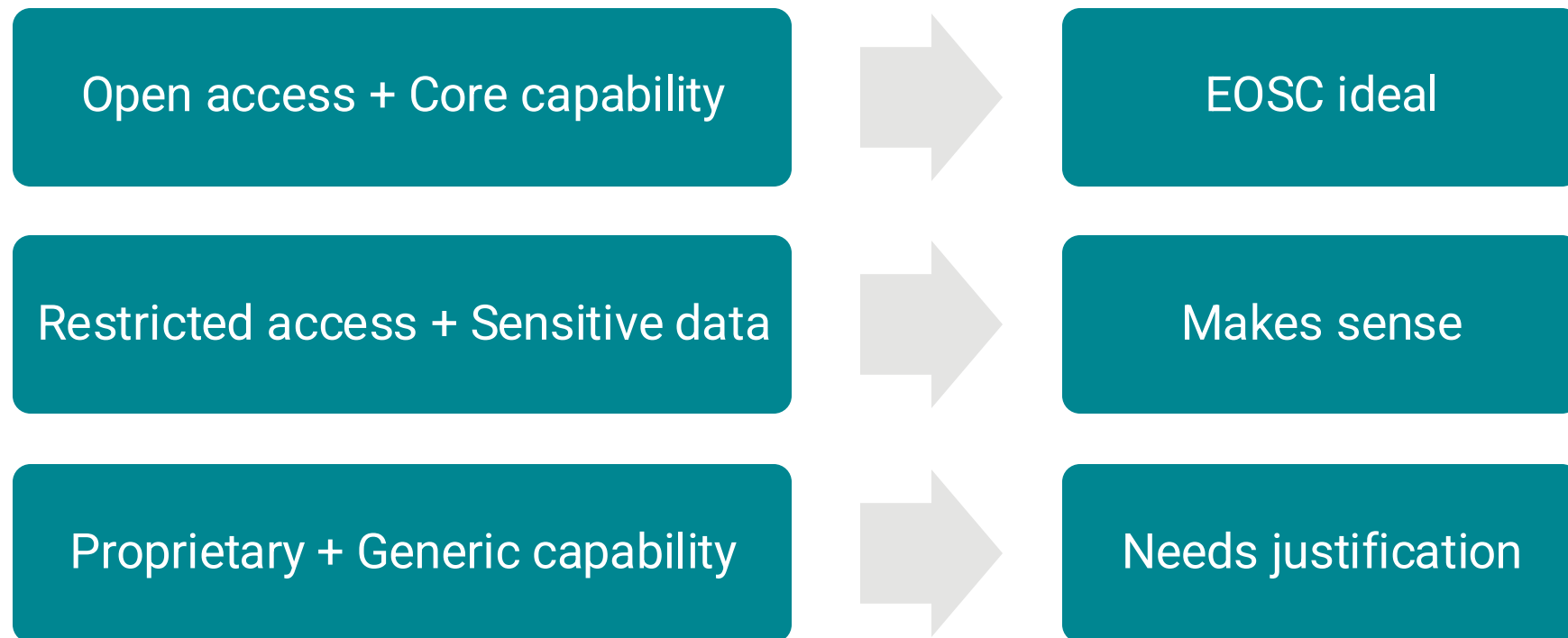
Use standard terms, add specificity in parentheses if needed.

The two columns work together:

Service	Access Policy	Federation Contribution	Makes Sense?
Public Data Repository	Open	Core: Data Repository	Yes
HPC System	Authenticated	Core: Compute	Yes
Sensitive Health Data	Restricted	Core: Data Repository	Yes (justified by sensitivity)
Public Discovery Service	Proprietary	Generic: Data Discovery	Questionable (why is discovery proprietary?)

Access Policy + Capability

Evaluators check logical consistency:



When in doubt: Check EOSC Service Catalogue (<https://eosc-portal.eu/catalogue>) for how similar services are categorised.

For each service/repository, select access policy and map its capability:

Access Policy of Services/ Repositories

Follow the decision tree (slide 7) and record your answers.

Federation Contribution

Is it one of the 4 Core Capabilities?

- ☐ Data Repository
- ☐ Compute
- ☐ Storage
- ☐ AAI

If not Core, which Generic Capability?

- ☐ Data Discovery
- ☐ Data Processing
- ☐ Workflow Orchestration
- ☐ Metadata Services
- ☐ Persistent Identifiers
- ☐ Training & Support
- ☐ Other:

Repeat this assessment for each offering. Save your results.

Thank you!