

Minimum Requirements for a Project Charter

Module 5: Technical Compliance

Topic 4: Building Your Technical Integration Roadmap



The Six Setup Steps

Your roadmap should follow this sequence rather than inventing your own:

Compliance with the EOSC Node Reference Architecture (Mandatory)

align your infrastructure to the Node architecture in Topic 3.

Publish/expose resources to the EOSC Federation Catalogue (Mandatory)

the Resource Hub registration from Topic 2.

Connect to existing Federating Capabilities (Mandatory + Recommended)

following each capability's Interoperability Guidelines as they're published.

Professionally operate the digital infrastructure (becoming Mandatory in 2026)

implement a Service Management System (FitSM-based, or ISO-20000/ITIL-compatible) and ensure cybersecurity controls are in place.

Access to Node resources via eduGAIN IDPs (Mandatory)

the AAI integration from Topic 1.

Enable new Federating Capabilities (Optional)

only if your Node is contributing new shared infrastructure, not something most Nodes need at Charter stage.

Writing the Roadmap

Weak

“Phase 1: AAI integration, Catalogue registration, and Core Capabilities implementation, months 1-24.”

Everything happening across the entire 24 months tells an evaluator nothing about sequencing or priority.

Strong

“Steps 3 and 4 (Catalogue registration, AAI via eduGAIN) complete within 6 months of Charter approval for our two TRL 7+ services. Step 1 (Node Reference Architecture alignment) runs in parallel. Step 2 (Service Management System) follows in months 6-12, ahead of the 2026 mandatory deadline. Step 5 (connecting to Helpdesk, Monitoring, and SMS Federating Capabilities) completes by the 2026 deadline for each, as their Interoperability Guidelines are released.”

The second version ties each step to the actual mandatory/2026 deadlines rather than an arbitrary internal timeline, which is exactly what makes a roadmap credible against a document evaluators also have in front of them.

Governance Readiness

Section 5 pairs “governance and technical readiness” explicitly. Two concrete governance steps apply here:

Signing the EOSC Federation MoU

a **mandatory prerequisite** to becoming a Node, separate from any internal MoU your own consortium partners sign with each other.

Appointing five key roles

Coordinator, Operations Manager, Cybersecurity Officer, Legal/Privacy Officer, and Communications Officer.

These must be named individuals at the time of application (Module 8 covers this in more depth for the Charter’s contacts section, but Section 5 is where you confirm the roles exist and are staffed).

Map your roadmap against the six steps above:

Step 1 (Node Reference Architecture) – status and timeline:

Step 2 (Service Management System) – status and timeline:

Step 3 (Catalogue registration) – status and timeline:

Step 4 (AAI via eduGAIN) – status and timeline:

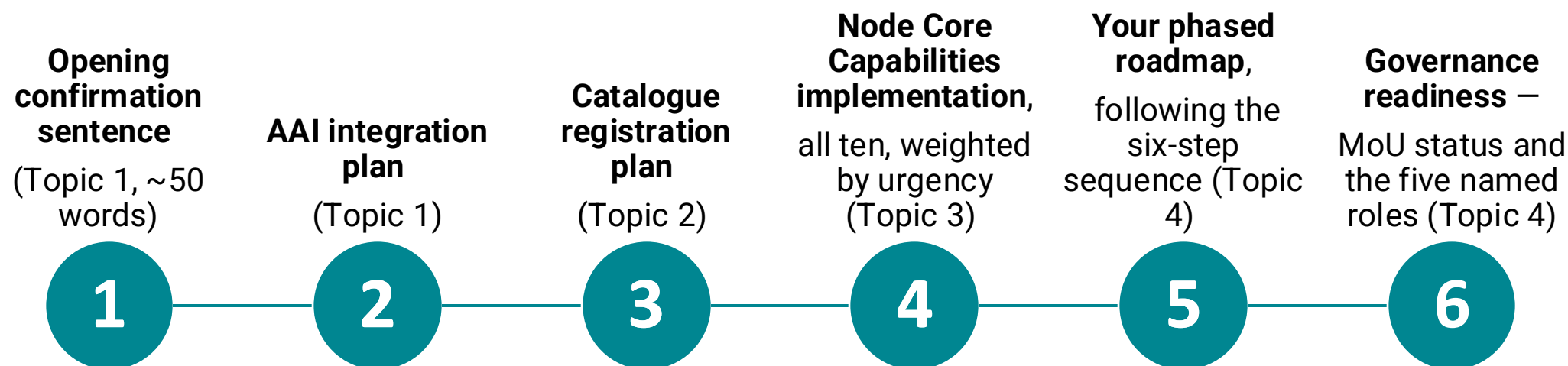
Step 5 (Connect to other Federating Capabilities) – status and timeline:

Governance: MoU signed? ☐ Yes ☐ In progress ☐ Not yet

Five key roles named: Coordinator: _____ Operations Manager: _____ Cybersecurity Officer: _____ Legal/Privacy Officer: _____ Communications Officer: _____

Assembling Your Section 5 Draft

Section 5 is one continuous narrative — so it helps to know the order your “Try This” answers should flow in before you start writing the actual Charter text:



Together, these six pieces fill your two pages.

If any one of them is running long, it's usually the roadmap or the Core Capabilities section — both can be tightened by cutting detail on capabilities that are merely recommended (Accounting, Order Management, Application Deployment Management) rather than trimming the mandatory or 2026-mandatory pieces.

Thank you!