The EOSC EU Node Resource and Services Onboarding (RSOP) Policy

Developing an Onboarding Services Policy

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Ten questions for any onboarding policy

EACH QUESTION: HOW THE EOSC EU NODE ANSWERS IT · WHAT TO DECIDE FOR YOUR NODE

1. **What is the RSOP and where does it come from?**
   Introduction
2. **What is the scope of the policy?**
   §1–2
3. **Who can contribute, and with what restrictions?**
   §3.1
4. **What can be onboarded?**
   §3.2–3.3
5. **What kinds of requirements apply?**
   §3
6. **What are the operational requirements?**
   §3, §4, §7
7. **What are the technical requirements?**
   §3.2, Annex B
8. **What is onboarding, and how does it work per case?**
   Annex A
9. **How are services integrated?**
   Annexes B–C
10. **What do the annexes provide?**
    Annexes A–E

An introduction to the RSOP

QUESTION 1 OF 10 · RSOP INTRODUCTION

- **Why the name?**
  - **Resources and Services:** two classes of onboardable items, each with its own eligibility and process
  - **Onboarding:** of items by third-party Contributors; distinct from Node enrolment (Node Registration Policy) and user contributions (UAP/AUP)
- **Who issues it?** The Operating Unit: European Commission, DG CNECT C.1
- **When did it come into effect?** Version 1.0, 26 June 2026
- **How was it developed?** Experience from onboarding Wave 1 Node services in testing, EC and Tripartite endorsement

Multiple onboarding/integration options and modalities were afforded to Wave 1 Nodes; first round of services integrated in EEN's testing environment and showcased in EOSC Symposium 2025



FOR YOUR NODE

Which policies do you already have (access, use, privacy)?

Who owns and issues your policy?

What has your own onboarding experience taught you?

Anatomy of the RSOP

TEN SECTIONS AND FIVE ANNEXES, IN FOUR BLOCKS

Core rules	Obligations	Standard provisions	Annexes (mechanics)
§1 Purpose	§4 Compliance of Contributors	§6 Data privacy and control	A Onboarding processes
§2 Scope	§5 Enforcement and modification	§7 Security incident response	B Technical requirements for services
§3 Eligibility: Contributors, Services, Resources		§8 Disaster recovery	C Infrastructure hosting
		§9 Helpdesk support	D Inclusion criteria
		§10 Limitation of liability	E Curation

Direction: keep the core rules short and stable; put processes and technical specifications in annexes you can update.

What is the scope of the policy?

QUESTION 2 OF 10 · RSOP §1 PURPOSE, §2 SCOPE

- **Purpose:** the rules and conditions under which legal owners of **third-party** Resources and Services onboard them
- **EOSC EU Node is a production infrastructure** for international, interdisciplinary research
  - **Not a channel to market:** commercial providers follow EU and national public procurement rules
- **Discretionary, not a right:** first come, first served, on a best-effort basis; onboarding is at the Operating Unit's discretion and can be revoked
- **Clear boundaries:** user contributions fall under the UAP/AUP; Node enrolment under the Node Registration Policy



FOR YOUR NODE

What is your mandate: thematic, national, regional?

What is explicitly out of scope, and where do you redirect it?

Is onboarding a right or at your discretion?

Who are the third parties?

QUESTION 3 OF 10 · RSOP §3.1 CONTRIBUTORS

- **Contributors** must meet all of the following:
  - **Legal entity** in the EU27, a Horizon Europe Associated Country, or an intergovernmental organisation of EU interest
  - **Compliance** with the onboarding guidelines and the EOSC Federation Handbook (ethics, legal, technical, security; openness, FAIR, interoperability)
  - **Added value** to EOSC, including European collaboration
  - **Alignment** with open science and multi-disciplinary, cross-border research
  - **Sustainability:** financial and operational
- **Evidence:** self-declaration in the Contributors Dashboard; signed statement, documents or public information on request



FOR YOUR NODE

Legal entities only, or also projects and individuals?

Which countries and organisation types?

Do you accept commercial providers?

Self-declaration or verified evidence?

What can be onboarded?

QUESTION 4 OF 10 · RSOP §3.2 SERVICES, §3.3 RESOURCES

1

Services

Integrated with the Node

Production → Resource Hub, registries, User Space

2

Data Sources

Resource, incl. harvestable targets

Harvested into the Knowledge Graph and curated

3

Training Materials

Resource

Published in OpenPlato (Moodle-compatible)

4

Interoperability Guidelines

Resource, approved by Federation governance

Deposited in Zenodo; listed in the Resource Hub

NOT ONBOARDED

- Research products stored internally by the Contributor
- Aggregators and metadata catalogues
- Catalogues of services as Data Sources (onboard as a Service instead)
- Narrow scope: redirect to thematic or national Nodes, or the OpenAIRE Graph

FOR YOUR NODE

Which types matter to your community? Where does each land in your Node? What do you exclude and redirect?

What kinds of requirements have we set?

QUESTION 5 OF 10 · RSOP §3 ELIGIBILITY

	Services	Data Sources	Training Materials	Interop. Guidelines
Scope	Multi-country, multi-disciplinary	Primarily international, interdisciplinary	Relevant to the Node, Federation or open science	Approved EOSC Interoperability Guideline
Ownership	Contributor fully accountable	Own or affiliated outputs, or demonstrable added value	Wholly produced, or all rights transferred	Wholly produced, or all rights transferred
Access	Open access; no paid or freemium models	Open access	Open access; English (+ EU27)	Open licence; English (+ EU27)
Maturity	TRL 7; support, maintenance, SLAs	TRL 7; support commitments	–	–
Technical & operational	AAI, SMS, capacity, FOSS, sovereign hosting	Catalogue registration, PIDs, SMS, availability	Moodle-compatible (OpenPlato)	Deposited in Zenodo

For your Node: keep the same dimensions for every type and calibrate the thresholds per type.

What are the operational requirements?

QUESTION 6 OF 10 · RSOP §3.2, §4 COMPLIANCE, §5 ENFORCEMENT, §7 SECURITY

- **Service management:** an SMS based on ISO/IEC 20000 or FitSM, aligned with ITIL
- **Capacity and availability:** up to 500 daily and 50 concurrent users; availability at the Node's production threshold
- **Support:** maintenance and SLAs; Level 2/3 helpdesk; technical, operational and security contacts
- **After onboarding:** the Contributor is solely responsible for operation, security and GDPR, and must report changes
  - **Conformance evaluations** by the Operating Unit, periodic or ad hoc
  - **Incidents** reported immediately to the CSIRT
  - **Breaches** lead to suspension or offboarding



FOR YOUR NODE

What service management maturity do you require?

What capacity and availability do your users need?

How will you check compliance after onboarding, and offboard?

What are the technical requirements?

QUESTION 7 OF 10 · RSOP §3.2 SERVICES, ANNEX B

- **Maturity:** TRL 7 minimum
- **Identity:** EOSC AAI compliance (mandatory)
- **Openness:** free and open-source software, fully documented; original licence or EUPL; documentation and training under CC BY 4.0
- **Sovereignty:** all components on infrastructure in the EU27 or Associated Countries
- **Security and privacy:** risk assessment and controls; published Privacy Statement with GDPR roles; backup and disaster recovery
- **Quality:** automated quality assurance; PIDs where applicable

?

FOR YOUR NODE

Which requirements are mandatory, which optional?

What is your stance on open source and sovereignty?

How will you validate: documents, tests, or both?

How does onboarding work?

QUESTION 8 OF 10 · RSOP ANNEX A ONBOARDING PROCESSES

1

Authenticate

Contributors Dashboard, open to authenticated users under the UAP

2

Register as Contributor

One Contributor Representative, who may delegate

3

Iterative review

Accept or reject; reapply after 3 months; disputes to EOSC Tripartite Governance

4

Onboard items

Per type: Services, Data Sources, Training, Guidelines

5

Operate and comply

Report changes; conformance evaluations

Offboarding: by the Contributor or the Operating Unit, and irrevocable; de-registering a Contributor offboards all its items.

For your Node: one entry point or several? Who reviews, and who arbitrates disputes? Do you need cooling-off periods before reapplying?

Onboarding depends on the case

QUESTION 8 OF 10 · RSOP ANNEX A

Services	Data Sources	Training Materials	Interoperability Guidelines
• Review plus technical validation against Annex B • Testing and staging access; acceptance criteria set by the Operating Unit • Production: Resource Hub, registries, User Space	• Iterative review • Harvested into the Knowledge Graph (Annex D) • Curated (Annex E)	• Iterative review • Published in OpenPlato, incl. curated collections	• Iterative review • Listed in the Resource Hub and registries
Reapply after 6 months	**Reapply after 3 months**	**Reapply after 3 months**	**Reapply after 3 months**

Direction: keep resource tracks light, and invest the effort where integration happens: services.

Services: environments and integrations

QUESTION 9 OF 10 · RSOP ANNEX B TECHNICAL REQUIREMENTS FOR SERVICES

Testing
Development use

↓

Staging
Validation only; integrated with the Node's staging

↓

Production
Same configuration as Staging

Integration	Status	What it means
AAI	**Mandatory**	EOSC AAI for authentication
Monitoring	**Mandatory**	Provide availability data, or register in the Node's monitoring
Helpdesk	**Mandatory**	Run Level 2/3 support units, or integrate an existing system
Accounting and Order Management	**Mandatory**	Required under the virtual credit model
User Space	**Optional**	Surface the service in the user's workspace

Services: access, credits and hosting

QUESTION 9 OF 10 · RSOP ANNEX B, ANNEX C INFRASTRUCTURE HOSTING

ACCESS GROUPS

AP-B	**Investigator**	**Required**
AP-A1	**Collaborator**	**Optional, equal or lower limits**
AP-A	**Observer**	**Optional, equal or lower limits**
AP-0	**Explorer**	**Not allowed (unauthenticated)**

Service Access Policy aligned with the Node's automated authorisation, the AUP and the service's capacity plan; a template may be provided.

VIRTUAL CREDITS

Mandatory if hosted on Node infrastructure. Users and Groups spend credits from their wallets; the billing model and Service Weights are set by the Operating Unit.

HOSTING (OPT-IN, FULL OR PARTIAL)

Managed container platform (OKD/Kubernetes) and OpenStack VMs, with storage and networking, at PSNC and Safespring. Free, as-is, for Node users only, revocable. Current contract to 13 Feb 2027; 4-year framework contract planned to 2031.

What do the Annexes provide?

QUESTION 10 OF 10 · RSOP ANNEXES A–E

A

Onboarding processes

Contributor registration, and the review, acceptance, rejection and offboarding of each item type

B

Technical requirements for services

Environments, integrations, Service Access Policy, access groups, credits, security, licensing

C

Infrastructure hosting

Container and VM resources, providers and terms of use

D

Inclusion criteria

What enters the Knowledge Graph from each source (OpenAIRE, CORDIS, CELLAR, Node catalogues, …)

E

Curation

Automated spam detection, confirmed by manual curation

For your Node: annexes are where you publish the mechanics: processes, specifications, criteria. Version them separately.

Starting points for your Node’s policy

HIGH-LEVEL DIRECTIONS

1. **Define your mandate and scope**
   and where you redirect what falls outside it
2. **Decide who may contribute**
   and how you verify it
3. **Choose your item types**
   each with its own track and destination
4. **Use shared requirement dimensions**
   and calibrate thresholds per type
5. **Treat compliance as continuous**
   and plan for offboarding from day one
6. **For services, specify integration**
   environments; mandatory and optional integrations
7. **Keep the core stable**
   and put mechanics in versioned annexes
8. **Align with the Federation**
   Handbook, Interoperability Guidelines, Resource Hub, Node Registration Policy

Thank you



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