The Sustainability WG "Fair Lady*" document
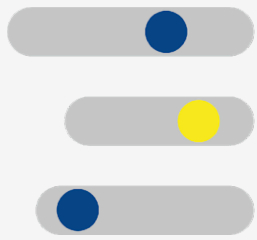
* olim Iron Lady

Jean-Yves Berthou, Inria

Member of Sustainability Working Group

5 février 2021
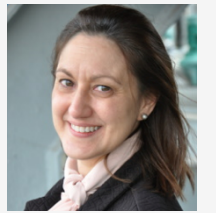Séminaire MESRI *"Structuration de l'EOSC en France"*

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WHAT

Provide strategic, legal and financing recommendations for an operational, scalable and sustainable EOSC federation

after 2020

WHY

A clear understanding of key strategic, financial and legal aspects is essential for the second phase of the EOSC implementation

Towards a sustainable EOSC

HOW

- Analyse business models and implications on legal entity, costs, regulations, financial strategies, supporting NDI alignment

- Map potential legal entities, taking into account national and European legislation
- Examine options for a governance framework to oversee EOSC operations and development

- Analyse regulatory/policy environments and assess impact of proposed structures and funding streams at national & European level
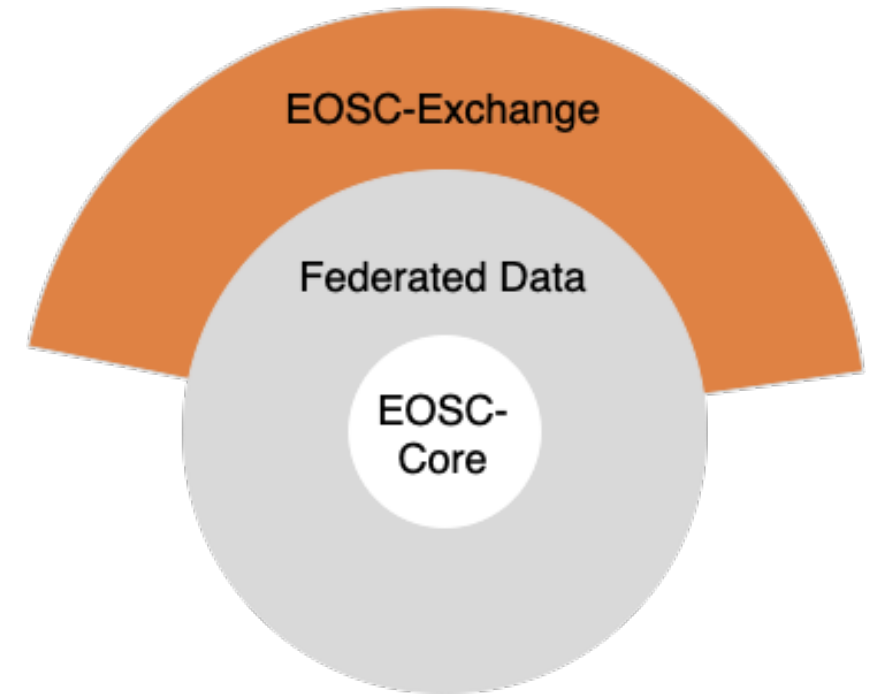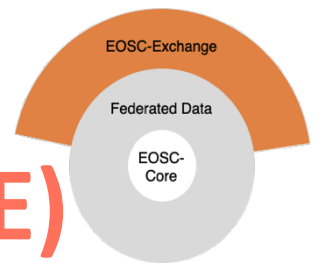
https://www.eoscsecretariat.eu/working-groups/sustainability-working-group

First iteration – a Minimum Viable EOSC (MVE)

- Main focus and added value: connect disciplinary infrastructures and enable cross-disciplinary research

- Establish an initial MVE that will enable the federation of existing and planned research data infrastructures dedicated to **publicly funded researchers**

First iteration – a Minimum Viable EOSC (MVE)

- The EOSC-Core:
  - A standard mechanism for naming and locating data and services
  - A mechanism for discovery of and access to data and services across the federated EOSC ecosystem.
  - A common framework for managing user identity and access
- EOSC-Exchange: a digital marketplace
  - Providing rich set of services to exploit FAIR data and encouraging its reuse to publicly funded researchers
  - Rivalrous services (to transport, store and compute research data, etc.) will be made available via EOSC-Exchange by
  - Participation as a service provider requires to conform to predefined Rules of Participation

MVE – funding and incentives for service providers and researchers

- Estimated cost of operating *EOSC-Core*: 7 million Euros per year

- Funds for developing, operating and maintaining the services included in EOSC-Exchange is principally the responsibility of the service providers that operate them, may be available free of charge or against payment but remain free at the point of use

- Funding sources: private and public, actions would be necessary at a political level

- Incentives for service providers and researchers :
  - enlarge eligible costs of EC proposals to request access to resources in EOSC-Exchange (NSF example)
  - Enable EC funded projects to buy EOSC-Exchange services from commercial service providers
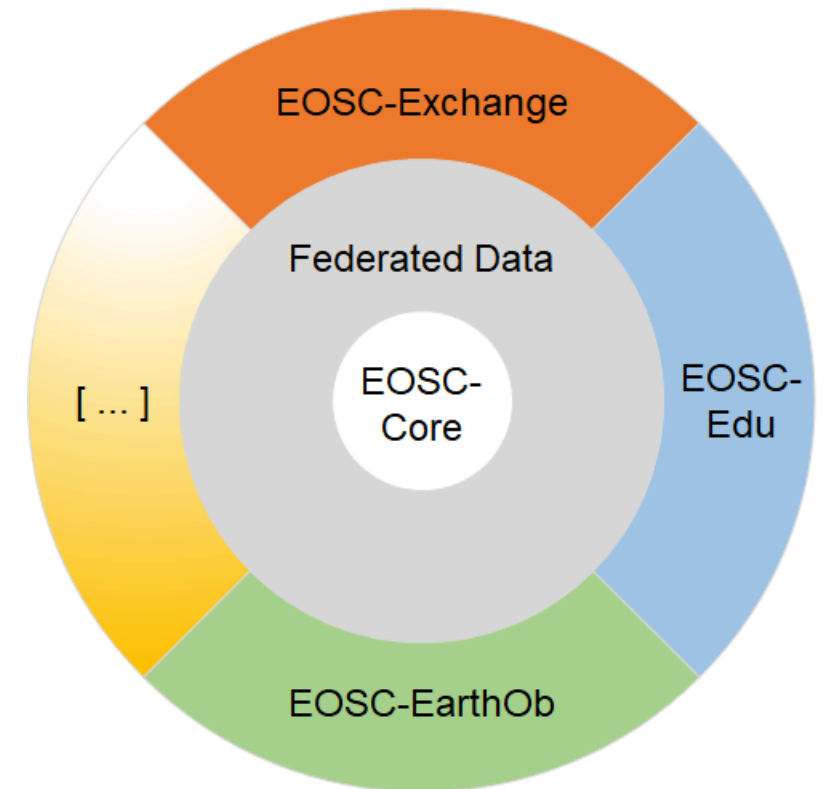
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MVE – funding and incentives for service providers and researchers
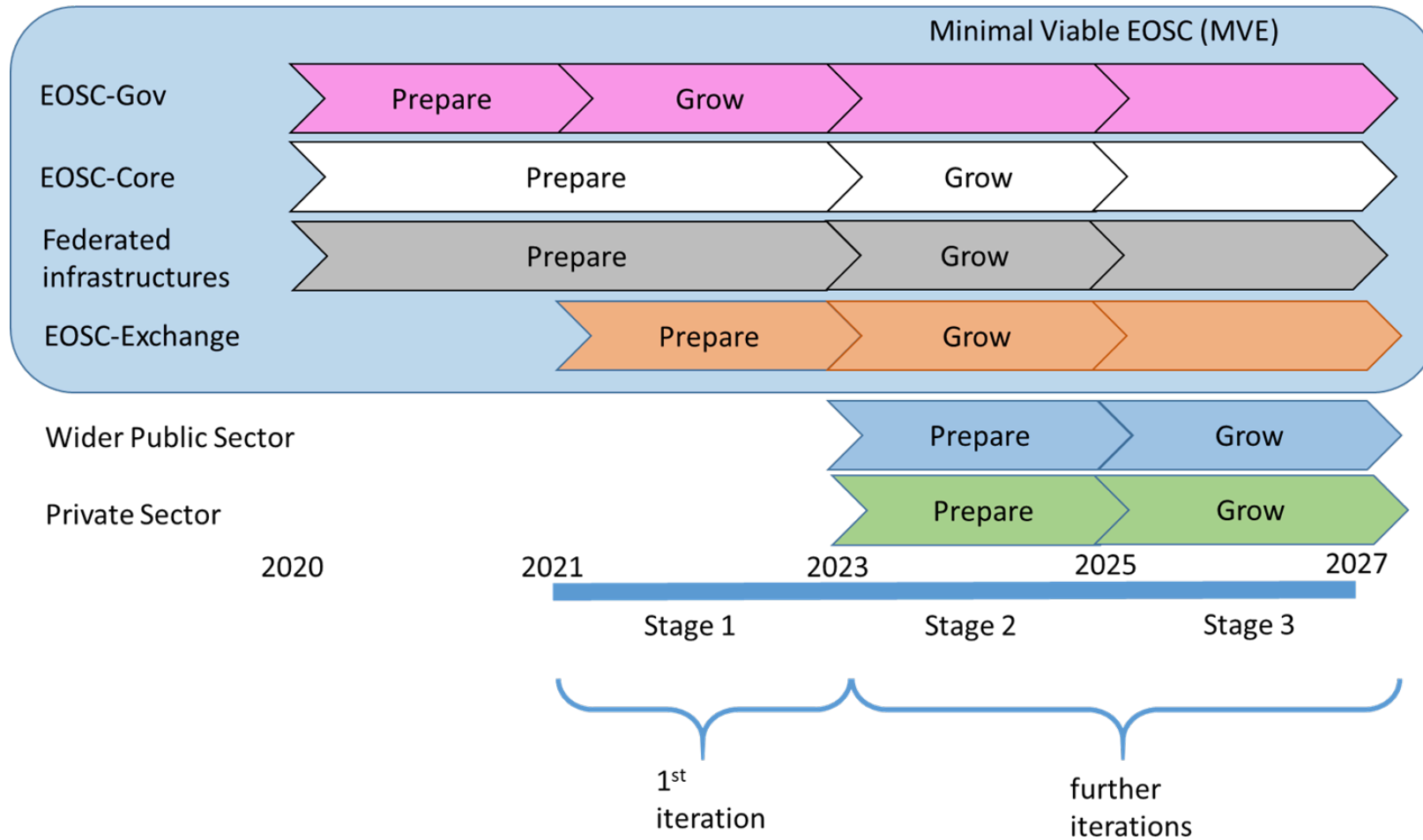
MVE Funding, a smooth transition

- Transition period, 2021-2023: MVE build on projects funded via Horizon 2020 funding calls (including INFRAEOSC-03-2020, INFRAEOSC-07-2020), EOSC-related projects as well as contributions committed by the EOSC Association members.

- After transition period, participants' financial contributions progressively increased, by the end of Horizon Europe, the shift of financial responsibility is to be completed

- Several proposed formulae for the sharing of the costs of operating EOSC-Core: research population size (Eurostat); Research population size, weighted with GDP; GDP based, subscription based, consumption based and various combinations there of; GDP based contribution taking into account EU policies regarding digital divide and inclusion

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Further iterations – Serving the Wider Public Sector & Private Sector

- Further iterations dedicated to requirements of private sector end-users and wider public sector

- Enable industry to exploit open data and associated services for commercial gain without distorting market competition

- EOSC-Edu & EOSC-EarthOb identified as first candidate examples
  to engage with wider public and business sector

- Additional engagement opportunities to be considered in further iterations of EOSC

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Timelines

Conclusions

- Divergence across and within stakeholder groups about the benefits and costs of EOSC as well as the disruption it may cause to existing structures, decision making processes and funding models
    - EOSC must acknowledge that such tensions exist and work to reconcile them

- Alignment with EU marketplace initiatives : synergies with initiatives such as GAIA-X, EuroHPC, bloXberg, Industry Commons, …

- There must be an objective assessment of what has been achieved with each iteration

- The creation of the **EOSC Association** is an important achievement and it could provide a forum where the stakeholders resolve their differences and confirm their commitment to EOSC

The MVE will be considered operational when key datasets and services provided by EOSC federated projects will be exploitable by end-users who are external to these projects

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