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D3.1 - Network strategy, roadmap and workplan

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TERMINOLOGY

| Terminology/Acronym | Description |
|---------------------|---|
| EC | European Commission |
| EOSC | European Open Science Cloud |
| EOSC EDEN | EOSC EDEN for Enhancing Digital preservation strategies at European and National level (an INFRA EOSC project and sibling of the FIDELIS project) |
| CPPs | EOSC EDEN's core preservation processes |
| CTS | CoreTrustSeal |
| GA | Grant Agreement to the project |
| KPI | Key Performance Indicator |
| SIG | Special Interest Group |
| TDR | Trustworthy Digital Repositories |
| TTRAM | FIDELIS's Transparent Trustworthy Repository Attributes Matrix |

Executive summary

The FIDELIS TDR Network brings together digital repositories committed to the trustworthy, long-term stewardship of research data. Soft-launched in April 2025 with 72 provisional members, the Network now faces a critical transition: FIDELIS project funding concludes in December 2027, and the Network must become self-sustaining beyond that point.

The central challenge is converting provisional members into committed members. This requires addressing concerns around perceived value, senior management buy-in, financial constraints, and competition from other networks and membership bodies.

The strategy responds to this challenge through three mutually reinforcing objectives: crystallising a compelling membership value proposition; embedding members in governance and Network activities; and testing and stabilising a sustainable financing model. Together, these aim to transform the Network from a project-delivered offering into a member-run organisation with durable relevance and impact.

Concrete actions to deliver this include producing a Network charter, developing an independent brand and online presence, establishing a governance committee and general assembly, delivering training and capacity-building activities, and agreeing stewardship arrangements for key shared outputs. A sustainability plan and host arrangement for the Secretariat will be finalised ahead of the Network's hard-launch in Q4 2027, at which point membership fees will be introduced.

A fifteen-point roadmap tracks these activities from Q4 2025 through to December 2027, with two General Assemblies serving as key decision-making milestones. The strategy will be updated in 2027 to reflect progress and emerging priorities.

1. Introduction

In this document, the FIDELIS TDR Network (hereafter referred to as the Network) strategy for 2026-2027 is presented in the form of a diagnosis of the **challenges** to address, guiding policies ("**strategy**" options), and **concrete actions**¹. The strategy is intended to ensure continuation of the Network after the FIDELIS project concludes in 2027, and is to be updated in 2026. The analysis is supported by the work undertaken by the FIDELIS project in 2025, see also deliverables D2.1² and D2.2³.

The Network brings together digital repositories committed to trustworthy management and long-term stewardship of research data. To date, the Network has developed under a time-limited project framework, with a soft-launch in April 2025 and provisional membership to pilot shared approaches, criteria and services that strengthen trustworthiness in repository practices. Through the FIDELIS project the Network explores knowledge exchange (e.g. on repository onboarding in EOSC), joint stakeholder advocacy (e.g. position

¹ Following the "strategy kernel" methodology described by Rumelt, R. (2011) Good Strategy Bad Strategy: The Difference and Why It Matters.

² Paulsen, T., & Cilento, W. (2025). D2.1 - A proposed business model, Business propositions for the FIDELIS Network (V1.0). Zenodo. <https://doi.org/10.5281/zenodo.17791251>

³ Venkataraman, S. & Meijer, J. (2025). D2.2 - FIDELIS TDR Network Establishment. Zenodo. <https://doi.org/10.5281/zenodo.17976725>

statements), upskilling of TDRs through a training & support programme and harmonisation of key TDR concepts (e.g. the TTRAM⁴).

The Network now faces a critical transition: current project funding and project-led structures will conclude in 2027. To ensure continuity, credibility and impact, the Network must evolve into a member-driven organisation capable of operating sustainably beyond the project's lifetime.

This strategy sets out how that transition will be achieved over the next 1.5 years. It is addressed to current and prospective members and summarises the core challenges, guiding choices and principal steps needed to establish a durable value proposition, member-led governance, and a realistic and fair model for sustaining the Network's activities.

2. Challenge

The Network was soft-launched by the FIDELIS project in April 2025 and has 72 provisional members to date with membership steadily growing. With a project KPI for membership of *low=30, medium=50 and high=80*, membership growth is not the challenge at this stage.

However, the membership is provisional with an application process which has been kept purposely minimal (endorsement of the TRUST principles) and, importantly, free. While this was a good way for the FIDELIS project to quickly build up a membership base to co-create the Network, it is still uncertain whether there will be organisational commitment to the Network membership when membership requirements change.

In the transition from provisional to regular membership there will be higher expectations to members, in the form of potential membership fees and in-kind participation to sustain a minimum viable network. This leads to the risk of membership loss in the transition towards sustainability of the Network.

The key challenge is to convince a sufficient number of provisional members to transform their provisional membership to a regular membership to ensure the Network's relevance and sustainability once the FIDELIS project ends in December 2027.

The following considerations are expected to play a role in the decision making process for regular membership of the FIDELIS TDR Network by member organisations:

- **Senior management buy-in.** The representatives of organisations currently interacting with the FIDELIS project and participating in Network activities may not necessarily be those that make the decision for regular membership. Relevant management buy-in needs to be secured.
- **Value perceived by relevant management and TDR practitioners.** The value proposition needs to be clear: what does membership bring to the organisation and its subject matter experts. The value is likely to be different for mature TDRs compared to less mature repositories. Network members must be given enough in return that benefits them. If they do not perceive tangible benefits, it is likely they will opt-out of full membership status.
- **Financial considerations** due to limited budget.

⁴ <https://eden-fidelis.eu/fidelis-ttramatrix>

- **Fit into organisational membership portfolio.** Larger organisations will have a broader membership portfolio where Network membership needs to fit in. Membership fatigue and competing networks in the repository and research data management community landscape will play a role, e.g. the CoreTrustSeal (CTS⁵) and EOSC Association⁶. The TDR Network needs to occupy a unique niche to warrant investment of resources.
- **Available staff time and expected contribution expectations.** Membership takes time, what is expected or required from members? Effort required to keep Network activity and facilitation ongoing, whether through a Secretariat or other budgeted activities, or in-kind activities which members would explicitly be required to do or expected to contribute to.
- As well as the FIDELIS project, there is also the EOSC EDEN project, which together are producing outputs that are of direct relevance to the Network members and which will have a symbiotic relationship

3. Strategy

The key challenge is to *convince a sufficient number of provisional members to transform their provisional membership to a regular membership to ensure the Network's relevance and sustainability once the FIDELIS project ends in December 2027.*

To address this challenge, the FIDELIS project will pursue the following strategy with three key objectives:

Use the remaining project period to transform the Network from a project-delivered offering into a member-run "club with benefits" by:

1. *crystallising a minimal but compelling membership value proposition,*
2. *embedding members in governance and Network activities, and*
3. *testing and stabilising a sustainable organisational hosting and membership financing scheme.*

4. Concrete actions

To implement the strategy described above will require a series of concrete actions intended to project a coherent course of action where the individual actions reinforce each other.

4.1 Crystallising a minimal but compelling membership value proposition

The value-add of the Network must be clearly defined and communicated, both to retain existing members and to attract new ones. This will also be contingent on the governance and sustainability plans being drafted separately, which will be published before the end of the FIDELIS project.

⁵ <https://www.coretrustseal.org/>

⁶ <https://eosc.eu/>

Define and articulate the membership value proposition. Produce a written charter that captures the Network's unique benefits, common values, and key differentiators – including its European and EOSC focus, the shared legal and funding challenges this implies, and the ties being established with relevant entities and projects. This provides a reference point for all members and a foundation for all outreach. Activities executed by the FIDELIS project on TDR advocacy, harmonisation and standardisation, increased legal understanding and training and support are to be included.

Promote a levelling-up agenda. Related to the above, actively target both mature and bigger as well as smaller and less mature repositories to demonstrate the concrete benefits Network membership offers them. Ensuring that all members can see a clear return is essential to broadening and sustaining the membership base.

Build a recognisable and independent Network identity. Develop consistent branding and a strong online presence – including social media and a members-only Network Forum – that reflect the Network's values, vision, and ambitions. Both must be clearly distinct from the FIDELIS project, as they will need to outlive it. Complementary promotional materials aimed at senior management should accompany this, given that financial and membership decisions are typically made at that level rather than by those attending Network activities day-to-day.

4.2 Embedding members in governance and Network activities

A healthy and vibrant Network requires members to be genuinely invested in its direction and activities, not merely passive participants. Governance structures and shared activities are the primary means of achieving this.

Establish governance structures that give members ownership. Constitute a general assembly for annual decision-making and community engagement, formalise interest and working groups around topics of demonstrable relevance to members, and continue developing the Network Secretariat to oversee day-to-day management and implementation of the charter. Together, these give members meaningful agency over the Network's direction and are central to long-term retention.

Test potential post-project approach for skills, training, and peer capacity-building. Build on the training and support activities being undertaken through FIDELIS Pillar 4, using these as a template for future delivery. Actively seek alignment with EOSC EDEN engagement activities, including the EDEN-FIDELIS Bootcamp series⁷, and explore potential formal links with the proposed EDEN Expert Curation and Digital Preservation Network⁸, where membership overlap is likely. Raising the capabilities of the broader repository community reinforces the Network's relevance and impact.

Explore joint advocacy on behalf of the Network members through short position statements and concrete interaction with the EOSC governance around the theme "TDRs and the EOSC Federation". Explore effective mechanisms for joint advocacy, effective membership engagement in joint advocacy efforts and appropriate mechanisms to get membership endorsement for particular positions.

Seek active membership engagement in harmonisation and standardisation efforts of the FIDELIS project. Identify use cases among Network members to evaluate and provide

⁷ <https://eden-fidelis.eu/events/2nd-eden-fidelis-bootcamp>

⁸ <https://eden-fidelis.eu/expert-curation-network>

feedback on the building blocks for technical and organisational federation of repositories that FIDELIS Pillar 3 is exploring and/or recommending.

Explore stewardship of key shared outputs. Explore leveraging the Network for long-term maintenance of e.g. EOSC EDEN's core preservation processes (CPPs), Digital Curation network and FIDELIS's Transparent Trustworthy Repository Attributes Matrix (TTRAM). These are valuable, ongoing resources for the community and the Network is the natural home for them. Doing so also strengthens the Network's authority and relevance to its members.

4.3 Testing and stabilising a sustainable organisational hosting and membership financing scheme

Long-term sustainability requires both an institutional foundation and a financing model that members find credible and proportionate.

Develop a sustainability plan for a minimum viable TDR Network including Network financing, resourcing, governance and Secretariat after the project phase, based on interaction with Network members and experiences with network value-add.

Secure a suitable organisational solution for the legal-administrative hosting of the Network and its secretariat. This will be investigated through three main options:

- hosting by one of the Network membership organisations
- hosting by the EOSC Association
- forming an independent legal entity dedicated to the Network

5. Roadmap

Between Q2 2026 and the end of the FIDELIS project in December 2027, a number of known concrete actions can be mapped out. The following table and Figure 1 illustrate these and will be implemented.

Table 1 Activities mapped out by time and each given a corresponding number for ease of cross referencing.

| No.* | Time | Activity |
|------|---------|---|
| 1 | Q4 2025 | Network's SIG-Legal launched: A special interest group on legal issues impacting repositories. |
| 2 | Q1 2026 | Secretariat to further mature and develop internal processes |
| 3 | Q1 2026 | Establish Governance Committee: a group of membership representatives that will, facilitated by the FIDELIS project, produce a concrete recommendation to the Membership for light-weight membership-driven governance. |

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| 4 | Q3 2026 | Network charter: drafting and consultation of a written charter capturing the Network's unique benefits, common values, key differentiators, and membership value proposition. |
| 5 | Q2–Q4 2026 | Branding and online presence: development of Network branding, social media presence, and the members-only Network Forum, distinct from the FIDELIS project identity. |
| 6 | Q4 2026 | Governance Plan: finalisation of the governance structure following desk research, member input, and Governance Committee recommendations. |
| 7 | Q4 2026 | Execute 1st GA: the 1st General Assembly is a milestone in the FIDELIS project due in November 2026 and will be the first opportunity to bring together Network member representatives to make pending decisions on governance and sustainability. |
| 8 | Q4 2026 | Sustainability Plan: finalisation of the business model – including the cost drivers, shared resourcing model and membership fee structure. Network membership consultation to take place during production of the plan. |
| 9 | Q1–Q3 2027 | Training and capacity-building: delivery of training and support activities building on FIDELIS Pillar 4, aligned with EOSC EDEN Bootcamp activities and exploring formal links with the Expert Curation and Digital Preservation Network. |
| 10 | Q3 2027 | Conclusion regarding potential stewardship arrangements for EDEN's Core Preservation Processes (CPPs) and FIDELIS's Transparent Trustworthy Repository Attributes Matrix ahead of the hard-launch. |
| 11 | Q3 2027 | Future Secretariat host decided: in anticipation of the hard-launch of the Network and feeding into its long-term sustainability plan and the introduction of membership fees. |
| 12 | Q3 2027 | Execute 2nd GA: an opportunity to fully launch the Network and take stock of FIDELIS project accomplishments. |
| 13 | Q4 2027 | Hard-launch network |
| 14 | Q4 2027 | introduce membership fees |
| 15 | Q3 2025 - Q4 2027 | Explore joint advocacy through joint position statements and interaction with EOSC tri-partite governance, supported by FIDELIS strategic alliance work |

(*See corresponding numbers in the Workplan section below.)

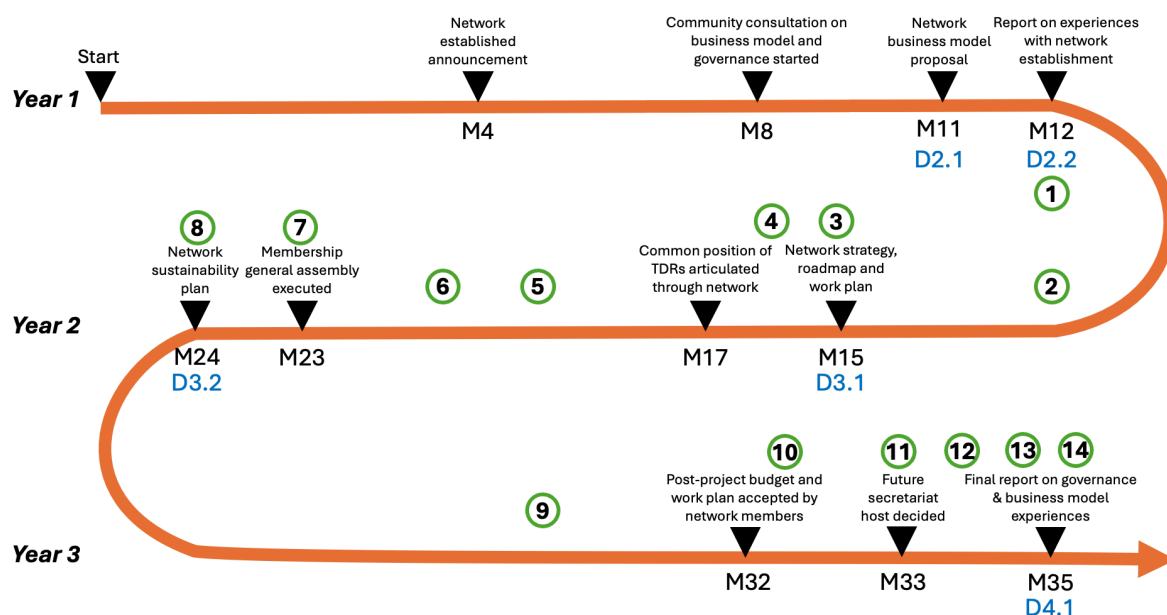


Figure 1 Roadmap of Network activities⁹

6. Workplan

Continuing from the roadmap laid out above, the following table outlines how activities will be executed and by whom.

Table 2 Activities mapped by whom and how each activity will be delivered and each given a corresponding number for ease of cross referencing.

| No* | Activity | Who? | How? | Detail |
|-----|-------------|---------------------------------------|---|--|
| 1 | Legal SIG | Members, FIDELIS Pillar 2 facilitates | Virtual meetings, asynchronously | A group of volunteer members that will investigate the state of the art in legal issues relating to repositories and their significance for the Network and its members. |
| 2 | Secretariat | DANS, Trust-IT, Sikt | Virtual meetings, asynchronously, TDR Network Forum | Network facilitation and day-to-day operations, fulfilled by project partners in Pillar 2. |

⁹ Shown as numbers in green circles and corresponding to the numbers in the Roadmap and Workplan tables, and mapped against deliverables and milestones detailed in the FIDELIS grant agreement. The table is adapted from Figure 1 of FIDELIS D2.2: Venkataraman, S. & Meijer, J. (2025). D2.2 - FIDELIS TDR Network Establishment. Zenodo. <https://doi.org/10.5281/zenodo.17976725>

| | | | | |
|---|--------------------------------|---|--|---|
| 3 | Governance Committee | Members, Secretariat | Virtual meetings, asynchronously | A group of volunteer members that will provide ongoing advice and guidance on Network governance considerations, and at the outset will advise on the initial governance structure. |
| 4 | Network charter | Secretariat, Members | Drafting by Secretariat, consultation with members, ratification at 1st GA | A written charter capturing the Network's value proposition, common values, key differentiators, and membership benefits. Provides a reference point for all members and a foundation for outreach and branding. |
| 5 | Branding and online presence | Secretariat, Trust-IT | Iterative development, TDR Network Forum, social media | Development of a consistent visual identity and online presence, including the members-only Network Forum. Branding must be clearly distinct from FIDELIS and designed to outlive the project. Promotional materials aimed at senior management will be produced in parallel. |
| 6 | Governance Plan | DANS, Sikt, TAU-FSD, Governance Committee | Network members ratify, GA | Finalisation of governance model and ratification by Network members at the 1st GA. |
| 7 | 1st General Assembly | Secretariat | Virtual | Virtual meeting to bring together Network GA representatives to ratify the governance and sustainability plans and make other key pending decisions. |
| 8 | Sustainability Plan | Sikt, DANS, TAU-FSD | Network members ratify, GA | Finalisation of sustainability model, including the cost drivers, shared resourcing model and indicative membership fee structure, and ratification by Network members at the 1st GA. |
| 9 | Training and capacity-building | FIDELIS Pillar 4 partners, Secretariat, EOSC EDEN | Workshops, Bootcamps, virtual collaboration | Delivery of training and support activities building on templates developed through FIDELIS Pillar 4. Aligned with EOSC EDEN Bootcamp activities; formal links with the Expert Curation and Digital Preservation Network to |

| | | | | |
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| | | | | be explored where membership overlap exists. |
| 10 | Stewardship arrangements for CPPs and TTRAM | DANS, Secretariat, Members | Agreement via GA or Governance Committee | Formal agreement on the long-term maintenance and ownership of EDEN's core preservation processes and FIDELIS's TTRAM, ensuring these key resources remain available and actively maintained after the project ends. |
| 11 | Future Secretariat host decided | Members, GA | Virtual poll, GA decision | Network members and GA will be consulted to decide which organisation will sustain and host the Secretariat in the long term. Contingency arrangements will also be agreed in the event the host relationship is disrupted. |
| 12 | 2nd General Assembly | Secretariat | Virtual | Virtual meeting to bring together Network GA representatives, formally launch the Network, and take stock of FIDELIS project accomplishments. |
| 13 | Hard-launch Network | Secretariat | 2nd GA | Transition the Network from an entity composed of provisional members to one operating under its ratified governance and sustainability frameworks, with full membership terms in effect. |
| 14 | Introduce membership fees | Secretariat | 2nd GA | Following the hard-launch of the Network, membership fees are introduced before the project ends and project budget ceases. |
| 15 | Joint advocacy | Network members, FIDELIS project Pillar 2 | Position statements | Using position statements endorsed by membership and interactions with relevant EOSC Governance, supported by the FIDELIS project's activity on strategic alliances. |

(*See corresponding numbers in the Roadmap section above.)