

**28-02-2026**

## **D7.3**

# **Exploitation Plan Final Report**

Publication Date: 28/02/2026  
Due Date: 28/02/2026  
Authors: Elia Bellussi  
Contributors: Christos Kanellopoulos (GÉANT), Nicolas Liampotis (GRNET), Hannah Short (CERN), Sally Chambers (DARIAH), Licia Florio (NORDUNet), David Groep (Nikhef NWO-I), David Kelsey (UKRI STFC RAL)  
Version: 1.0  
Document Code: D7.3  
Publishing Organisation: EGI Foundation

### **Abstract**

This document describes the AARC Exploitation Plan for the Key Exploitable Results.

### **Copyright**

© Members of the AARC community.

This work is licensed under a Creative Commons Attribution CC-BY 4.0 Licence





# Table of Contents

<b>Executive Summary</b> .....	<b>4</b>
<b>1 Objectives and Key Exploitable Results</b> .....	<b>5</b>
1.1 Project Objectives and KER Mapping .....	5
1.2 Key Exploitable Results.....	6
1.2.1 KER1 — Updated AARC Blueprint Architecture .....	8
1.2.2 KER2 - Recommendations for a common long-term strategy for AAI services and best practices.....	13
1.2.3 KER3 – Updated interoperability framework .....	18
1.2.4 AARC TREE — Success Stories by Key Exploitable Result .....	23
<b>2 Conclusions</b> .....	<b>26</b>

Acronym	Definition
AAI	Authentication and Authorisation Infrastructures
BPA	Blueprint Architecture
DoA	Description of Action
EOSC	European Open Science Cloud
IP	Intellectual Property
IPR	Intellectual Property Rights
KER	Key Exploitable Result
RI	Research Infrastructure
TRL	Technology Readiness Level
WG	Working Group

## Executive Summary

AARC TREE is a project of the AARC (Authentication and Authorisation for Research and Collaboration) community, funded under Horizon Europe call HORIZON-INFRA-2024-EOSC-01. It was designed to ensure continued development, maintenance, and promotion of the AARC community outputs that underpin the federated identity ecosystem for European and international research.

The project delivered three Key Exploitable Results (KERs) addressing: the AARC Blueprint Architecture (BPA), a common long-term AAI strategy, and the AARC Interoperability Framework. Together, these results provide the conceptual and technical backbone for federated Authentication and Authorisation Infrastructures (AAs) that serve the broader Research and Education ecosystem, including initiatives like EOSC.

All three KERs have reached a mature operational stage (TRL 9) and have achieved broad adoption across European and international research infrastructures.

# 1 Objectives and Key Exploitable Results

The AARC TREE project — funded under Horizon Europe call HORIZON-INFRA-2023-DEV-01 (Grant Agreement No. 101131237) — takes the AARC Blueprint Architecture (BPA) and its suite of accompanying guidelines as the basis to drive the next phase of integration for research infrastructures: expanding federated access management to integrate user-centring technologies, expanding access to federated data and services (authorisation), and consolidating existing capacities while avoiding fragmentation and unnecessary duplication.

The project is structured around four main objectives, as defined in the Grant Agreement Description of Action, and delivers three Key Exploitable Results (KERs) that together address those objectives. Table 1 maps each project objective to the KER(s) it underpins and the primary work package responsible.

## 1.1 Project Objectives and KER Mapping

Project Objective	Linked KER(s)	Description	Primary WP
(i) Requirements & Landscape Analysis	Input to all KERs	Capture and analyse new Authentication and Authorisation interoperability requirements (supporting emerging integration use-cases across the thematic area) and provide a landscape analysis of AAI services — including gaps — in the RIs represented in AARC TREE.	WP3
(ii) Technical & Policy Guidelines	KER1 — Updated AARC BPA KER3 — Updated Interoperability Framework	Define and validate new technical and policy guidelines for the AARC BPA that address RI use-cases, improving the integration of RIs across thematic areas and increasing the ability of RIs to support emerging needs.	WP1 WP2 WP4
(iii) Expand Adoption & Validation	KER1 — Updated AARC BPA KER3 — Updated Interoperability Framework	Expand the number of research communities that can implement the AARC BPA and/or the AARC guidelines, by providing a validation environment and toolkits. At the same time support existing AARC communities in adopting new guidelines.	WP4

Project Objective	Linked KER(s)	Description	Primary WP
(iv) Compendium & Stakeholder Alignment	KER2 — Common Long-Term AAI Strategy	Bring RIs, e-Infrastructures and relevant stakeholders together to align strategies to integrate new technologies, better interoperate and share resources across thematic areas, and produce a compendium and recommendations for different stakeholders.	WP5 WP7

*Table 1: AARC TREE Project Objectives and linked Key Exploitable Results (source: Grant Agreement No. 101131237)*

The four objectives are mutually reinforcing. Objective (i) provides the requirements input — through WP3 landscape analysis and use-case collection — that drives the technical and policy work under objectives (ii) and (iii). Objective (iv) ensures that the resulting knowledge is synthesised and disseminated to a broad audience of research infrastructures, policymakers, and funding bodies.

## 1.2 Key Exploitable Results

The DoA defines three Key Exploitable Results for AARC TREE. These were identified at the outset of the project and are already known and established within the AARC community. All three KERs are collectively owned by the consortium partners and published under a CC-BY 4.0 open licence, in line with the project's open science commitment and the IP management strategy described in D7.2.

KER	Title	TRL	IPR / Access	Exploitation Path
KER1	Updated AARC Blueprint Architecture for emerging technologies and services in pan-European research infrastructures	9	Collectively owned by consortium partners CC-BY 4.0	Integration with RIs, EOSC and industry, starting from relevant project partners. Individual exploitation plans developed with the support of all partners. Promotional materials (slides, factsheets) produced by T7.1.
KER2	Recommendations for a common long-term strategy	9	Collectively owned by consortium	Adoption by RIs and relevant stakeholders including decision makers and policy-

KER	Title	TRL	IPR / Access	Exploitation Path
	for AAI services and best practices		partners CC-BY 4.0	making bodies. Strong support from Dissemination and Communications for promotion at relevant events, web, and professional social media.
KER3	Updated AARC Interoperability Framework	9	Collectively owned by consortium partners CC-BY 4.0	Adoption of harmonised AAI services based on the AARC framework by RIs, starting from relevant project partners. Strong support from Dissemination and Communications.

*Table 2: AARC TREE Key Exploitable Results — overview (source: Grant Agreement No. 101131237 and D7.2 Exploitation Plan)*

KER1 and KER3 are the primary technical outputs of the project, directly addressing objectives (ii) and (iii). KER1 — the Updated AARC Blueprint Architecture — provides the foundational reference architecture for federated AAI, while KER3 — the Updated Interoperability Framework — provides the accompanying policy and technical guidelines that enable independent research infrastructures to achieve interoperable federated identity management. KER2 — the Recommendations for a Common Long-Term AAI Strategy, published as the AARC Handbook — addresses objective (iv) by making the BPA and its guidelines accessible to a broad, non-specialist audience.

All three KERs have been delivered and published by the end of the project reporting period (M24). They are available under open licences on Zenodo with persistent DOIs and on the AARC community website (<https://aarc-community.org/>), ensuring the broadest possible adoption and long-term accessibility beyond the project lifetime.

### 1.2.1 KER1 — Updated AARC Blueprint Architecture

The 2025 revision of the AARC Blueprint Architecture (AARC BPA) provides a reference architecture for federated Authentication and Authorisation Infrastructures (AAIs) supporting research collaborations. It introduces a refined functional capability-based model structured around Identity Management, Collaboration Management and Service Integration, clarifying functional responsibilities while preserving backward compatibility with previous AARC BPA versions.

The revision strengthens interoperability across independent AAI deployments, supports modular implementation, and accommodates both community-first and identity-first user workflows. It also establishes a foundation for future credential paradigms, including verifiable credentials.

The AARC BPA 2025 enables sustainable, interoperable federated access across European and international research infrastructures. The AARC BPA 2025 shows broad European and international alignment.

Elements of its architectural model are reflected in the EOSC AAI Architecture 2025 and referenced within national and international identity federation initiatives, including IAM4NFDI and the Australian Access Federation (AAF).

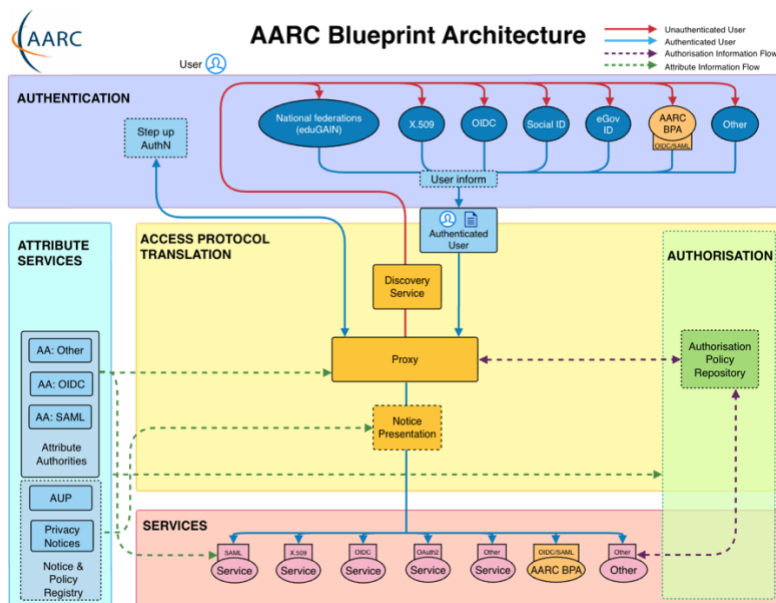


Figure 1 - AARC Blueprint Architecture - Technical Overview

## AARC Blueprint Architecture

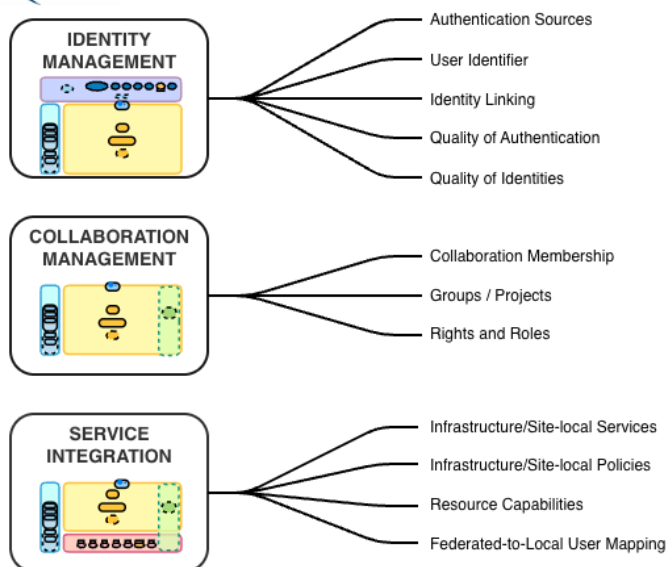


Figure 2 - AARC Blueprint Architecture - General Overview

### 1.2.1.1 KER1 – AARC TREE Deliverables Correlation Table

The following table maps all AARC TREE project deliverables that are related to KER1: Updated AARC Blueprint Architecture for Emerging Technologies and Services in Pan-European Research Infrastructures.

Deliverable	Title	Description	Due Month	Relevance to KER1	Relevance Category
D1.1	Blueprint Architectures Initial Revision	Guidance on the Federation Concept, and Community Attributes	M15	Directly precedes and informs the AARC BPA 2025 described in KER1; establishes initial architectural updates consolidated in the final release.	Core (direct output)

Deliverable	Title	Description	Due Month	Relevance to KER1	Relevance Category
D1.2	Final Blueprint Architectures Version 2024	Final Federation Concept, Federated Authorisation, and Decentralised Identities	M24	This is the primary output corresponding to KER1: the AARC BPA 2025 with the refined functional capability model (Identity Management, Collaboration Management, Service Integration).	Core (direct output)
D2.1	Trust Framework for Proxies and Sncf Research Services	Trust framework, guidelines and best practice for BPA proxies and interaction with research services	M15	Supports the trust and interoperability goals of KER1; aligned with the future OpenID Federation integration mentioned in KER1's next steps.	Policy & Trust Framework
D2.2	AARC Policy Development Kit Revision	Evolved suite of guidelines and templates for research and infrastructure communities	M24	Provides updated policy tools aligned with the BPA 2025 adoption strategy described in KER1, supporting the interoperability and market expansion goals.	Policy & Trust Framework

Deliverable	Title	Description	Due Month	Relevance to KER1	Relevance Category
D3.1	Landscape Analysis of AARC BPA Adoption	Landscape of deployment of AARC BPA AAI and the adoption of AARC guidelines	M10	Provides the evidence base for KER1's adoption claims (>1,000 users, multiple operational deployments) and supports the reach across European and international RIs.	Adoption & Validation
D3.2	Use-Case Collection and Analysis	Collection of requirements and use-cases from RIs in context of AAI BPA to provide input for technical and policy work	M12	Feeds user requirements into the BPA 2025 revision; underpins the community-first and identity-first workflows described in KER1.	Adoption & Validation
D4.1	Validation Tests Results	Report describing results of the pilots and developed validation tools	M22	Validates the technical maturity (Result Maturity Level 9) claimed in KER1 through concrete pilot results and testing across diverse operational environments.	Adoption & Validation
D5.1	Compendium of AARC Best Practices & Recommendations	Webpage and report containing the compendium and recommendations	M23	Consolidates best practices derived from the BPA 2025; directly supports the community guidance objectives and	Dissemination & Exploitation

Deliverable	Title	Description	Due Month	Relevance to KER1	Relevance Category
				the replicability model described in KER1.	
D7.2/D7.3	Exploitation Plan	In-depth description of how project results, developments and branding will be communicated	M6, M24	Covers the exploitation and market expansion strategy for KER1, including outreach to new adopters and implementers of the AARC BPA beyond the current AARC community.	Dissemination & Exploitation

#### 1.2.1.2 Summary of progress towards objectives and details for each task

The result has reached a mature stage as a reference architecture with multiple operational deployments across research and e-infrastructures, enabling interoperable federated and cross-border access to distributed services and being maintained through active community governance. Future work focuses on its evolution towards support for identity wallets and verifiable credentials, further alignment with emerging trust frameworks such as OpenID Federation, and broader adoption beyond traditional research infrastructures.

### **1.2.2 KER2 - Recommendations for a common long-term strategy for AAI services and best practices**

The Authentication and Authorisation for Research and Collaboration (AARC) Compendium - which will be published as the AARC Handbook - is intended as an introductory guide to implementing federated identity management for research collaborations, based on the AARC Blueprint Architecture.

This guide introduces Authentication and Authorisation Infrastructure (AAI). A glossary of key terms and their definitions is provided, as well as a list of Frequently Asked Questions.

The compendium covers several different topics, including: what is the AARC Blueprint and why has it been developed, how to implement an AAI service outlining a number of implementation scenarios. An overview of the landscape of existing AAI solutions is provided including commonly used software and services as well as hosted services.

Specific topics such as technical requirements, security, data protection and policy related issues are covered, including how to build the necessary bridges between legal, policy and technology.

The AARC Handbook has been written with several audiences in mind:

1. Research Community Management
  - a. Audience: research community management
2. AAI Implementors and Operators
  - a. Audience: AAI implementors and operators
3. Funding Agencies
  - a. Audience: funding agencies
4. All
  - a. Audience: all

## 8. Summary & Recommendations

Created by Hannah Short, last updated on Jan 06, 2026 · 1 minute read

### AUDIENCE: RESEARCH COMMUNITY MANAGEMENT

Research Collaborations should **prioritise establishing an AARC Compliant AAI as an early cornerstone of their infrastructure**. As the pressure for researchers to become active increases it will be increasingly tempting to adopt sub-optimal AAI mechanisms that will ultimately impact research productivity. Early investment in a common, AARC-compliant AAI significantly reduces long-term costs, operational complexity, and disruption, compared to retrofitting identity solutions once communities are already established.

Wherever suitable, the **adoption of a hosted AAI solution is encouraged** to minimise overhead and ease future interoperability between AAI.

### AUDIENCE: FUNDING AGENCIES

Funding agencies should not only **fund shared AAI solutions and hosted services** but also **require early involvement of AAI operators in grant proposals**, ensuring best practices are followed and avoiding delays or suboptimal implementations due to late or unfunded AAI integration.

Ongoing **funding for Research AAI communities of best practice** (such as the AARC Projects or FIM4R) is essential. These are critical resources for new or evolving research collaborations who require customised guidance to navigate this complex, specialised domain and identify the best AAI solution for their unique requirements.

### AUDIENCE: AAI IMPLEMENTORS AND OPERATORS

Organisations providing complete AAI solutions should focus on **optimising the setup time for research collaborations**. This includes easy to follow documentation, quick-start guides, responsive support and clear information on pricing and/or eligibility.

### AUDIENCE: ALL

The wider Research AAI community should remain active and responsive to requests for guidance from new or evolving research collaborations.

Figure 3 - Audience mapping

### 1.2.2.1 KER2 – AARC TREE Deliverables Correlation Table

KER2 is delivered primarily through WP5 (Compendium & Recommendations, M14–M24, co-led by CERN and DARIAH). It synthesises outputs from WP1, WP2, and WP3 into a compendium of AARC best practices and recommendations for a common long-term AAI strategy accessible to a broad, non-specialist audience. The table below maps all project deliverables to KER2, indicating the nature of each contribution.

Deliverable	Title	Description	Due Month	Relevance to KER	Relevance Category
D5.1	Compendium of AARC Best Practices & Recommendations	Webpage and report containing the compendium and recommendations for a common long-term strategy for AAI	M23	This is the KER2 artefact itself. Synthesises the AARC BPA (WP1), the policy and technical guidelines (WP2), and the use-case	Primary Output

Deliverable	Title	Description	Due Month	Relevance to KER	Relevance Category
		services in pan-European Research Infrastructures. The primary deliverable of WP5 and the direct embodiment of KER2.		analysis (WP3) into a compendium accessible to a broad audience: RI Managers, Funding Agencies, AAI Implementors, and a general research audience.	
D3.1	Landscape Analysis of AARC BPA Adoption	Landscape of deployment of AARC BPA-compliant AAI and adoption of AARC guidelines within the RIs represented in AARC TREE, produced at M10 as the starting point for compendium content.	M10	Provides the baseline landscape and adoption data that informs the strategic recommendations in KER2. The compendium situates its recommendations against this documented landscape of current AAI deployment practices.	Direct Input
D3.2	Use-Case Collection and Analysis	Collection of requirements and use-cases from RIs in the context of the AAI BPA, providing input for the technical and policy work of WP1 and WP2, as well as the compendium content of WP5.	M12	Grounds the KER2 recommendations in documented RI requirements and real-world use cases. The compendium structure and audience targeting were shaped by the use-case analysis performed in this deliverable.	Direct Input
D4.1	Validation Tests Results	Report describing results of the pilots and	M22	Provides validated implementation experience that	Validation & Testing

Deliverable	Title	Description	Due Month	Relevance to KER	Relevance Category
		developed validation tools, covering cross-RI pilots of technical and policy guidelines including WISE AUP/Privacy Notices interoperability and OpenID Connect Federation deployments.		enriches the practical guidance in KER2. Evidence of what works in real deployments strengthens the authority and credibility of the compendium recommendations for decision makers and funding bodies.	
D7.1	Communication and Dissemination Plan	Clear dissemination strategy for project results as well as engagement with the targeted audiences, promotion, outreach, and co-design activities.	M6	Defines the dissemination and outreach strategy for KER2. The compendium outreach campaign at M23–M24 (T5.3) is executed under this plan, targeting Research Communities, Funding Agencies, and AAI Operators.	Dissemination
D8.1	AARC TREE Strategy Document — Who, What, Why?	AARC TREE Strategy document describing the strategic approach of the project and a list of activities to advance the AARC BPA Framework and deliver recommendations to ensure the sustainability of AAls for the	M4	Provides the strategic framing — sustainability, stakeholder alignment, long-term vision — that underpins the KER2 recommendations. The compendium's long-term strategy orientation directly reflects the direction set in this document.	Supporting Context

Deliverable	Title	Description	Due Month	Relevance to KER	Relevance Category
		scientific community.			

#### 1.2.2.2 KER2 – Summary of progress towards objectives and details for each task

The first version of the AARC Handbook has been published at the end of the AARC TREE project. This will be further iterated by the AARC Handbook Editorial Board and the wider AARC Community.

### 1.2.3 KER3 – Updated interoperability framework

The AARC Interoperability Framework provides structured policy and technical guidance to support interoperable deployment of AARC BPA-compliant AAls. It comprises thematic guidelines addressing identity and access management practices, trust and policy harmonisation, and operational interoperability, together with the Policy Development Kit (PDK) that supports policy harmonisation across collaborations and infrastructures. The framework is use-case driven and evolves through community feedback and implementation experience. Endorsed by AEGIS, it is governed collaboratively by research infrastructures, AAI operators, architecture & policy experts. By defining shared expectations and common implementation patterns, the framework reduces fragmentation and enables consistent cross-border federated access across research ecosystems.

#### 1.2.3.1 KER3 – AARC TREE Deliverables Correlation Table

KER3 is delivered through WP2 (Trust Policy Harmonisation and Interoperability, M1–M24, co-led by Nikhef/NWO-I and UKRI-STFC). It provides the structured policy and technical guidelines — including the Policy Development Kit — that enable independent research infrastructures to achieve interoperable federated identity management. The table below maps all project deliverables to KER3, indicating the nature of each contribution.

Deliverable	Title	Description	Due Month	Relevance to KER	Relevance Category
D2.1	Trust Framework for Proxies and Sncfti Research Services	Trust framework, guidelines and best practice for BPA proxies and interaction with research services. Covers the Operational Trust Framework for Community and Infrastructure BPA Proxies and the evolution of Sncfti.	M15	First release of the KER3 Interoperability Framework. Delivers the trust and information security guidelines for infrastructure membership management and proxy components, providing RIs with a structured policy baseline for interoperable	Primary Output

Deliverable	Title	Description	Due Month	Relevance to KER	Relevance Category
				federated access.	
D2.2	AARC Policy Development Kit Revision	Evolved suite of guidelines and templates for research and infrastructure communities. Final version of the PDK including revised community policy templates, cross-sectoral trust guidelines, and eID/eIDAS assurance guidance.	M24	Final and complete delivery of KER3. Extends the Interoperability Framework with lightweight community policy templates, new cross-sectoral trust guidelines in OIDC Federation-based models, and updated PDK templates aligned with the AARC BPA 2025.	Primary Output
D1.1	Blueprint Architectures Initial Revision	Guidance on the Federation Concept and Community Attributes. Initial revision of the AARC BPA, incorporating harmonised community user attributes and OpenID Connect Federation deployment profiles.	M15	The BPA is the architectural reference that the KER3 Interoperability Framework is built upon. D1.1 provides the foundational architecture that the trust and policy guidelines in D2.1 operate within, ensuring alignment between architecture	Direct Input

Deliverable	Title	Description	Due Month	Relevance to KER	Relevance Category
				and policy layers.	
D1.2	Final Blueprint Architecture Version 2024	Final Federation Concept, Federated Authorisation, and Decentralised Identities. Complete updated AARC BPA incorporating all WP1 task outputs including authorisation guidelines and decentralised identity guidance.	M24	The complete BPA 2025 that the final KER3 Policy Development Kit (D2.2) is aligned with. The PDK revision explicitly reflects changes in the AARC BPA 2025, ensuring the Interoperability Framework remains coherent with the updated architectural model.	Direct Input
D3.1	Landscape Analysis of AARC BPA Adoption	Landscape of deployment of AARC BPA-compliant AAs and the adoption of AARC guidelines within the RIs represented in AARC TREE.	M10	Identifies current policy and trust framework gaps across the RI landscape. This baseline informs the prioritisation and scope of the trust guidelines and PDK revisions delivered under KER3, ensuring the framework addresses documented real-world	Direct Input

Deliverable	Title	Description	Due Month	Relevance to KER	Relevance Category
				interoperability barriers.	
D3.2	Use-Case Collection and Analysis	Collection of requirements and use-cases from RIs in the context of the AAI BPA, providing input for the technical and policy work of WP1 and WP2.	M12	Provides the RI policy requirements and use-cases that directly shaped the scope of the KER3 guidelines. The cross-sectoral trust guidelines and PDK lightweight templates in D2.2 were developed in direct response to requirements documented here.	Direct Input
D4.1	Validation Tests Results	Report describing results of the pilots and developed validation tools, including cross-RI pilots for WISE AUP/Privacy Notices interoperability and automated validators for interoperability guidelines.	M22	Validates the KER3 guidelines in real production environments. The WISE AUP and Privacy Notices pilot (starting M6 in collaboration with WP2) directly tests the trust framework outputs. The automated validator suite enables ongoing conformance checking	Validation & Testing

Deliverable	Title	Description	Due Month	Relevance to KER	Relevance Category
				against KER3 guidelines.	
D7.2/D7.3	Exploitation Plan	In-depth description of how project results, developments and branding will be communicated. Includes exploitation paths, IPR management, and impact indicators for all three KERs.	M6 / M24	Documents the exploitation strategy for KER3, including the adoption path via AEGIS governance, integration with RIs starting from project partners, and dissemination support. The KER3 exploitation path commits to strong community governance through AEGIS beyond the project lifetime.	Dissemination

### 1.2.3.2 KER3 – Summary of progress towards objectives and details for each task

The guidelines and Policy Development Kit (PDK) are publicly available, actively maintained, and used by research infrastructures and AAI operators deploying AARC BPA-compliant AAls. The framework is governed through AEGIS under an established community process that incorporates implementation feedback and evolving use cases. Multiple independent infrastructures have adopted the guidelines to implement policy alignment and interoperability practices in operational production environments, demonstrating sustained real-world application.

### 1.2.4 AARC TREE — Success Stories by Key Exploitable Result

This chapter collects evidence of achievements and adoption mapped to each of the three AARC TREE Key Exploitable Results.

KER1 captures the first major revision of the AARC Blueprint Architecture since its original release in 2019. The success stories below document the breadth of adoption of the existing BPA (which establishes the baseline impact) and the specific achievements of the AARC BPA 2025 revision delivered by AARC TREE.

#	Achievements	Evidence (from AARC website)	Source
1	AARC BPA underpins major European e-infrastructures and RIs	The AARC BPA today underpins the AAI of major e-infrastructures (GÉANT, EGI, EUDAT) and research infrastructures across Europe — such as DARIAH, EISCAT, MARIS and the EOSC AAI.	<a href="#">One Year of AARC TREE (March 2025)</a>
2	AARC BPA 2025 released — first major update since 2019	Release of the AARC-BPA-2025 revision, shaped by extensive input from research communities and real-world deployment experience. The architecture introduces simplified terminology, streamlined protocols (focus on OIDC/OAuth 2.0), new Identity and Collaboration Management capabilities, and an enhanced authorisation model with OAuth 2.0 Proxied Token Introspection.	<a href="#">AARC BPA 2025 announcement (July 2025)</a>
3	Structural alignment with the EU Digital Identity Wallet (EUDI Wallet)	The most significant change in AARC BPA 2025 is the shift towards Identity Management and Collaboration Management capabilities, which decouples user identification from dynamic collaboration membership entitlements and structurally aligns the architecture with the issuer roles required by emerging wallet-based paradigms such as the EUDI Wallet.	<a href="#">AARC TREE Final Event (February 2026)</a>
4	23 Research Infrastructure interviews grounding the revision	To ensure alignment with real-world needs, AARC TREE conducted 23 interviews with Research Infrastructures and is piloting key components of the guidance, including the new attribute profile and layered notice management. An online validation platform is under development to support adoption and self-assessment.	<a href="#">AARC BPA 2025 announcement (July 2025)</a>

5	Continuous community validation through AEGIS and EOSC AAI WG	Continuous feedback from the AARC Engagement Group for Infrastructures (AEGIS) and the EOSC AAI Working Group ensures specifications remain practical and community-driven.	<a href="#">AARC BPA 2025 announcement (July 2025)</a>
---	---	---	--

KER2 is embodied in the Compendium of AARC Best Practices and Recommendations (D5.1, M23). The success stories below document the process by which the Compendium was developed with community input and the strategic value it delivers to a broad audience of research infrastructures, policymakers, and funding bodies.

#	Achievements	Evidence (from AARC website)	Source
1	AARC Compendium published — practical recipes for AAI adoption	AARC TREE published a compendium of AAI practices within the R&E community, providing practical recommendations to support the sustainable deployment of the AARC BPA and of AARC BPA-compliant AAI. The compendium aims to reduce start-up time for research collaboration and facilitate interoperability in the coming years by providing concise information and recipes to follow.	<a href="#">AARC TREE Final Event (February 2026)</a>
2	Dedicated Compendium Workshop at CERN with broad community participation	On 17 September 2025, the project held a dedicated workshop at CERN (co-located with the OSCARS Composability Workshop) to gather community input on the Compendium. Four use cases helped fine-tune the AARC Guidelines, outlined implementation challenges, and explored how the Compendium would be instrumental in facilitating wider adoption, particularly by Research Infrastructures.	<a href="#">Compendium Workshop Summary (September 2025)</a>
3	Compendium addresses non-specialist audiences including funders and policymakers	Workshop feedback confirmed the need to ensure accessibility for both technical experts and non-specialist audiences, including funders and policymakers, and to address sustainability, governance, and funding challenges to maintain AAI tools beyond project lifetimes.	Compendium Workshop Summary (September 2025)
4	Long-term sustainability strategy for AAI services formalised	Work is underway on recommendations for a long-term strategy for AAI services in pan-European Research Infrastructures. A dedicated	<a href="#">One Year of AARC TREE (March 2025)</a>

	workshop was organised to support this, and the strategy work feeds directly into the Compendium of Best Practices and Recommendations due at project end.	
--	--	--

KER3 is delivered through the Policy Development Kit v2 (D2.2, M24) and its associated trust framework (D2.1, M15). The success stories below document specific technical and policy achievements that together constitute the updated Interoperability Framework.

#	Achievements	Evidence (from AARC website)	Source
1	Policy Development Kit v2 — simplified and restructured for small communities	The PDK released in 2019 was deemed still too complex. The AARC policy team has now compressed all the work in a clear sequence of steps and related policy documents, offering a clear framework for federated security policies particularly aimed at small communities that may not have sufficient in-house expertise.	<a href="#">AARC TREE Final Event (February 2026)</a>
2	Modular trust framework (AARC-I082) for proxy operators published	AARC TREE defined a modular trust framework (AARC-I082) underpinning PDK v2. It distinguishes between stable, high-level policies and adaptable operational procedures, and clarifies responsibilities across five key stakeholder groups: Research Governance, Users, Authentication Sources, Collaboration Management, and Service and Infrastructure Providers.	<a href="#">AARC BPA 2025 announcement (July 2025)</a>
3	Snctfi v2 provides an assessable trust baseline for federated ecosystems	Snctfi version 2 offers a focused, assessable trust baseline for proxy operators, drawing on established community practices such as Sirtfi and the REFEDS Data Protection Code of Conduct. This helps infrastructures reliably identify trustworthy providers in federated ecosystems where many rely on external proxies.	<a href="#">AARC BPA 2025 announcement (July 2025)</a>
4	OAuth 2.0 trust mechanisms between proxies documented	An informational document on methods for establishing trust between OAuth 2.0 proxies explores approaches for enabling trust and interaction between Authorization Servers and Resource Servers across different domains,	<a href="#">One Year of AARC TREE (March 2025)</a>

		facilitated through Trust Authorities issuing authoritative statements within an identity federation.	
5	Notice Management guideline improves user experience across RIs	The Notice Management guideline focuses on improving the user experience by reducing the number of clicks. By making notices machine-readable and signalling acceptance, it enables infrastructures and services to re-use existing acceptance and not to have to intervene in the research flow.	<a href="#">One Year of AARC TREE (March 2025)</a>

## 2 Conclusions

The AARC TREE project has delivered on its objectives as planned and has successfully engaged the research community beyond the formal scope of the project.

One of the project's primary goals was to ensure that AARC continues to serve as a recognised forum where research communities worldwide can collaborate, address common challenges, and develop shared use cases. The AARC community — even beyond the period of direct project funding — will continue to support and promote the results of AARC TREE, ensuring that federated access solutions and emerging user-centric identity technologies can be deployed in an interoperable manner to benefit the scientific community.

Discussions have also begun on extending the successful AARC approach to support broader education-related use cases. This area will be further explored in collaboration with key stakeholders, including Erasmus+, the European Student Card initiative, university alliances, and other relevant actors.