

EGI-InSPIRE Extension

1 Summary

Presently at EGI.eu and its associated partners, the EGI Global Tasks are embedded within the EGI-InSPIRE project and its costs and activities are not transparently visible to the community. Exposing these activities and their costs¹ has helped identify a set of activities taking place at EGI.eu and within the community – the Core EGI Activities – that must be sustained to maintain EGI at its current level as a production infrastructure not only during any project extension but onwards into the future.

Within the project activities can be categorized into:

- EGI Global Tasks including:
 - Activities *critical* to EGI and *preventing the degradation* of EGI's capability
 - Activities that contribute to the *growth* and *development* of EGI
 - Other activities that no longer need to be run by EGI
- NCI International Tasks and support for routine national and support activities
- Specific development activities (e.g. the operational tools)
- Specific support activities

A project extension would allow the project to expand its activities from supporting Heavy User Communities (a focus for PY1-3 with the SA3 activity which has now ended) to putting our efforts into outreach to smaller and individual researchers (the 'long-tail' of researchers in the ERA) and to establish or focus on activities that would be eligible for continued funding within Horizon 2020.

In summary, there would be no change to the scope of activities during PY4, however some activities may have less effort committed to them to ensure some funded activity during the 6 months of PY5 as described in Section 2. Subject to the agreement of the EGI Council, in PY5 and beyond, support will be assured for EGI's Core Activities – a subset of the current EGI Global Tasks – that are critical for the operation of EGI and prevent its degradation and these are described in Section 3. Significant changes in service functionality and major new community, technical or the development of our human capital would have to await support through successful Horizon 2020 projects. The extension would not provide any additional support for national operational activities unless partners have unused funding they can carry forward from PY4.

¹ <https://documents.egi.eu/document/1552>

2 EGI-InSPIRE Extension

To achieve a six month no cost extension of the project the following constraints are being used:

- There will be no movement of funds between partners.
- Priority is given to ensuring the critical and anti-degradation EGI Global Tasks continue running in PY4 and beyond – see Section 3.
- Other activities (lower priority EGI Global Tasks, NGI International and General Tasks) are expected to stop at the end of PY4, use up a partner’s remaining funded effort, or continue as best-effort.

Specific activity for each work package is described below. Activity described in Section 3 is expected to continue regardless of the work package it is located in.

WP1 (NA1): Management

This activity is based completely at EGI.eu and the effort being placed on administration, technical management and quality assurance will be reduced in PY4 to continue effort beyond PY4 until the end of the project.

WP2 (NA2): Community Engagement

Changes are broken down for each individual task, but in general at EGI.eu effort will be reduced in PY4 and redirected to activities that will continue for 6 months in PY5 and in any funded follow on projects. Other partners can choose to reduce their effort levels during PY4 so they can continue funded effort in PY5, or continue at current efforts in PY4 and work on an unfunded basis during PY5. The priority for partners should be NGI International Liaisons and their contribution to virtual teams.

- **Activity Management:** Continuing at reduced levels at EGI.eu and at other partners through the NGI International Liaisons (either as funded or unfunded effort).
- **Marketing & Communications:** The project website will be maintained but the monthly Director’s letter will be stopped to be replaced by targeted letters around major community events/meetings and blog posts produced (like the newsletters) as required. The EGI presence at external events will be aligned with activities from the EGI Champions and the NGI International Liaisons, and while effort in coordinating the event will be provided by the central team the staffing of the stands will have to be supplemented by the NGI or the supported discipline area.
- **Strategic Planning and Policy Support:** From the start of PY4 a technical secretariat will no longer be given to policy groups and the individual groups will have to appoint a secretary from within the participants. Liaison activities will focus around the ESFRI projects, e-IRG and the IGTF/EUGridPMA only. The EGI Compendium will form a defined part of PY4 and PY5 activities.
- **Community Outreach:** Effort will be concentrated on developing the human networks being established in the EGI Community through the NGI International Liaisons and the EGI Champions. This task will provide the effort to establish these channels (both within and

external) to the EGI Community which will be supplemented by the Forums which will change to smaller meetings with a more 'internal' format.

- **Technical Outreach to new Communities:** The Collaboration Services provided within NA2 (Training Marketplace, Applications Database and CRM) will continue to be developed until the end of PY4 after which they will continue to be operated and any maintenance will be unfunded effort only. Effort at EGI.eu will be reduced to focusing on building liaisons with ESFRIs and new communities by supporting and participating in virtual teams.
- **NGI Distributed Competency Centre:** Will stop at the end of PY4 and participation in virtual teams and other activities will be on an unfunded effort basis.

WP4 (SA1): Operations

During PY4 there will be no significant change in the overall scope of the activities. However, the experience during to date of running the EGI Global Operations Tasks indicates that some effort redistribution could take place at the start of PY4 to fine-tune effort and to shift resources into areas that need more effort. This planned redistribution is being refined and will be discussed with the relevant partners during the EGI Community Forum.

During PY5 general national partner activities in SA1 will continue at an unfunded effort basis if resources are available. EGI Global Operations Tasks that are part of the core activity will continue (See Section 3) but other activity is expected to reduce to the minimum needed to operate the infrastructure.

WP5 (SA2): Provisioning the Software Infrastructure

The end of PY3 sees a major change in the structure of the technology providers and the degree of integration that can be expected between the different product teams that were previously part of the EMI and IGE projects. As part of its longer term software strategy, EGI is focusing on the a platform model where it has responsibility for the EGI Core Platform (the services needed to operate and manage the infrastructure) and the EGI Cloud Platform (the services needed to operate a federated IaaS based infrastructure). This is a smaller set of software components that need to be integrated than has taken place to date.

The definition of the quality criteria will focus on the components in the EGI Core Platform and on the quality requirements that developers need to comply with for their components in a Community Platform to integrate successfully with the EGI Core Platform. There will be fewer releases and therefore less verification effort will be needed. The bulk of the software components that currently make up UMD will then become part of several Community Platforms. The responsibility for the coordination, maintenance, development, integration and verification of components in a Community Platform falls to the platform integrators from the middleware developers community or from the research community that uses the virtual research environment delivered by that platform.

As a transition during PY4, the reduced effort needed to define and verify the components needed directly by EGI will be used to help coordinate these Community Platform activities, through the UMD Release Team. Effort in PY4 will be expanded to adapt the Software Repository to this new operating

environment which will enter into maintenance only mode for PY5. The federated cloud activities will continue as planned in PY4 and in PY5 will cease to become a funded activity and revert to a coordinated community activity.

WP6 (SA3): Heavy User Communities

This activity stops at the end of PY3 and this will not change.

WP7 (JRA1): Operational Tools

This activity will continue as planned in PY4. Effort in PY5 will be provided for maintenance of critical operational tools as part of the core EGI activities – see Section 3.

WP8 (SA4): Accelerating EGI’s Strategic Objectives

The SA4 mini-projects are due to end at the end of PY4 and this will not change and no new funded activity is planned for PY5.

3 Core EGI Activities

At the Evolving EGI Workshop in January 2013, community input was received on the impact of different EGI Global Tasks undertaken by EGI.eu and its partners in the community. The activities assessed as being critical and preventing degradation are reported below as seen as 'core' to EGI's continued operation and these will be the focus of effort in PY4 and beyond. These tasks will change over time as services evolve, are retired or new services introduced, and may expand and contract as the funding from the participants in EGI.eu changes over time.

3.1 Critical EGI Global Tasks

The following are the tasks deemed critical to the continued operation of EGI where the activity types are O=Operation, C=Coordination, M=Maintenance, D=Development, S=Support.

Service	Activity	PM	Cost (€)	Partner (s)
Operational Tools and Meta-service Monitoring	O	0.9	€18,706	CERN
Service Availability Monitoring (SAM) central service	O M C	23.8	€454,973	CERN, SRCE
Collaboration Tools (e.g. wiki, Indico, mailing lists, etc.)	C D O	3.4	€23,682	CESNET
1st Level Support	C S	18.3	€140,160	CESNET, INFN, JUELICH, LIU
Verification of acceptance criteria	C	5.6	€28,093	CISC, LIP
Operations Portal	M C S	19.9	€125,260	CNRS
Staged Rollout	C	4.1	€17,840	CSIC, LIP
Admin, Finance and Secretariat	C	1.3	€16,271	EGI.eu
Application Porting Support	C	11.2	€75,096	EGI.eu
Governance Body Coordination	C	1.9	€21,650	EGI.eu
Operations Manager Coordination (e.g. OMB)	C	5.2	€64,351	EGI.eu
Supplier Management (e.g. TCB)	C	3.4	€34,568	EGI.eu
Technical Solutions Consultancy	C	2.8	€18,774	EGI.eu
User Community Coordination (e.g. UCB)	C	3.8	€32,564	EGI.eu
Security (Incident Response, Monitoring Tools, Liaison, Operations & Policy Coordination)	S C M O	20.4	€215,464	FOM, CESNET, STFC
Tools (Grid Services) for Resource Centre certification	O	1.4	€14,628	GRNET
Software Provisioning Infrastructure	O	3.7	€26,732	GRNET, AUTH, IASA, ICCS
Message Broker Network	O M	6.9	€64,450	GRNET, SRCE
Coordination of Tool Development	S C	6.5	€47,188	INFN
Ticket triage and assignment	S C	9.0	€57,907	INFN
2nd Level Support	S C	18.3	€140,160	INFN, JUELICH, LIU, CESNET
Incident Management Tool (EGI Helpdesk)	C M O	16.2	€144,076	KIT-G
GOCDDB	M O	5.7	€45,008	STFC
Accounting Repository & Portal	C O M	8.2	€82,395	STFC, FCTSG
TOTALS		202	€1,909,996	

3.2 Anti-Degradation EGI Global Tasks

The following tasks are seen by the EGI Community as preventing the degradation of EGI. When funded in addition to the critical tasks (which ensures EGI continued operation) these ensure that EGI's activity remains at similar service qualities.

Service	Activity	PM	Cost (€)	Partner (s)
Event Organisation	C	3.8	€32,564	EGI.eu
Project Management and Planning	C	17.0	€129,317	EGI.eu
Reports and Briefing Documents	C S	26.1	€182,175	EGI.eu
Collaboration Agreements	C	3.5	€24,290	EGI.eu
Policy Development Process Management	C	0.5	€3,795	EGI.eu
Requirements Gathering and Analysis	C S	12.0	€80,460	EGI.eu
Technical Solutions Consultancy	S	11.2	€75,096	EGI.eu
Application Porting Support	S	2.8	€18,774	EGI.eu
Promotional Material, Copywriting, Web Content, Events	S	31.4	€193,097	EGI.eu
Grid Oversight	S C	14.1	€140,382	CYFRONET, SARA
Staged Rollout	S	12.3	€53,520	CSIC, LIP
Operations Portal	D	8.8	€68,102	CNRS
Verification of acceptance criteria	S	16.7	€84,280	CISC, LIP
Accounting Portal	D	4.1	€20,236	CISC (FCTSG)
Collaboration Tools (e.g. wiki, Indico, mailing lists, etc.)	M S	10.2	€71,045	CESNET
Service Availability Monitoring (SAM) central service	D	2.8	€42,667	CERN, SRCE
TOTALS		183	€1,277,413	

3.3 Core EGI Activities at EGI.eu

The Core EGI activity that takes place at EGI.eu is part of a larger activity – see earlier for the complete list of activities. Examining the activities taking place directly at EGI.eu that are seen to be critical or prevent the degradation of EGI (presented in the previous sections): yields:

Service	Activity	PM	Cost (€)
Admin, Finance and Secretariat	C	1.3	€16,271
Application Porting Support	C	11.2	€75,096
Governance Body Coordination	C	1.9	€21,650
Operations Manager Coordination (e.g. OMB)	C	5.2	€64,351
Supplier Management (e.g. TCB)	C	3.4	€34,568
Technical Solutions Consultancy	C	2.8	€18,774
User Community Coordination (e.g. UCB)	C	3.8	€32,564
Event Organisation	C	3.8	€32,564
Project Management and Planning	C	17.0	€129,317
Reports and Briefing Documents	C S	26.1	€182,175
Collaboration Agreements	C	3.5	€24,290

Policy Development Process Management	C	0.5	€3,795
Requirements Gathering and Analysis	C S	12.0	€80,460
Technical Solutions Consultancy	S	11.2	€75,096
Application Porting Support	S	2.8	€18,774
Promotional Material, Copywriting, Web Content, Events	S	31.4	€193,097
TOTALS		137.9	€1,002,842

The following activities taking place at EGI.eu were seen as contributing to the growth of EGI and these are the services that would be stopped in PY4 unless they are:

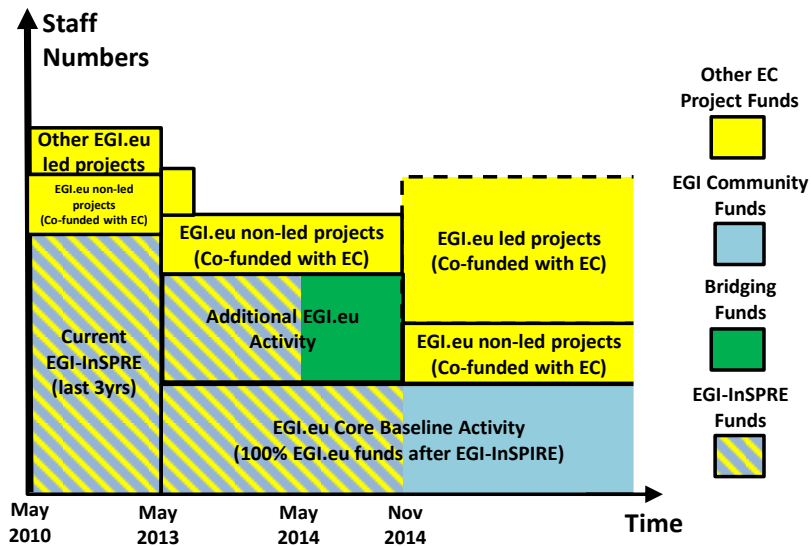
- Administrative activities need to support EGI.eu's participation in EC projects where the costs are covered explicitly within the project or part of the organisation's overhead charges.
- Technical activities that are seen to be fundable and to be funded by EC projects within Horizon 2020 starting in Autumn 2014.

Service	PM	Cost (€)
Admin, Finance and Secretariat	3.9	€48,812
Project Management and Planning	51.0	€387,950
Policy Development Process Management	1.6	€11,386
Secretariat Support to Policy Groups	2.2	€15,181
Collaboration Agreements	5.2	€36,435
Event Organisation	11.3	€97,692
TOTALS	72.2	€597,456

Effort levels at EGI.eu are therefore bounded by undertaking activities that are just critical and non-degrading (137.9PM – 11.5FTE) and in addition contributing to the growth of EGI (210.1PM – 17.5FTE).

4 Conclusions

The proposed EGI-InSPIRE extension will have an impact on the EGI.eu staffing profile – shown below. The project extension, with the support from the EGI Council, will allow key staff to be retained beyond the sustainable delivery of EGI’s Core Activities supported by just the participation fees. These experienced staff will then be available to focus on these new activities over the next 18 months and then be supported in the future by Horizon 2020 projects.



The primary impact at EGI.eu is that community activity would be reduced and refocused through a DoW amendment on reaching the ‘long-tail’ of researchers. This activity would be aligned to the projects being proposed in Horizon 2020 and this 18 month period would provide a transition to the new model. Expertise and critical mass would be retained during the whole of 2014 to help build these new projects.

Within the other partners in EGI-InSPIRE those staff working on EGI Global Tasks seen as being critical or preventing the degradation of EGI would continue beyond PY4 with similar contributions from the partner and EGI.eu (50:50). Other project activities would either need to use local unallocated EC funding or become an unfunded best effort contribution during the project extension.