EGI-InSPIRE PY4 and PY5

V 7.0 – 13 Nov 13

This document summarizes the changes proposed to the description of work of EGI-InSPIRE for year PY4 and PY5 following the recommendations received during the PY3 review and the need to ensure:

1. the continuation of support of a subset of NGI international tasks
2. the support to a few EGI strategic and innovation activities to ensure their evolution towards maturity.

# Executive Summary

Changes to the DoW are proposed both for PY4 and PY5.

* PY4 changes are proposed to implement actions to follow the PY3 reviewers’ recommendations
* PY5 activities are proposed to ensure continuation of human coordination and of other strategic activities. Starting with PY5 many EGI Global tasks, will evolve into EGI Core Activities, and the tasks will be no longer part of the EGI-InSPIRE PY5 work plan.

PY5 of EGI-InSPIRE will mark a new phase of European e-Infrastructure activity: an EC funded project activity (EGI-InSPIRE) will complement community funded services (the Core EGI Activities) coming from the EGI Council fees and national services operated by the NGIs.

The EGI-InSPIRE PY5 activities were informed by a survey sent to the EGI-InSPIRE collaboration and rely n funds that are projected to be unspent by the end of PY4. Partners will have to decide:

1. To actively participate in PY5, submit a Form C for PY5 and engage in other reporting activity,
2. To contribute voluntarily to tasks on an unfunded basis during PY5 with reduced reporting requirements.

Depending on this decision partners will be invited to continue to contribute to specific tasks described later in this document.

The following table provides an overview of the proposed changes in PY4 and PY5 for each activity.

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| --- | --- | --- |
| **Activity**  | **PY4 Proposed changes** | **PY5 Proposed changes** |
| **NA2** |
| **NA2.1 Activity Management** | None**Affected partners**: none | Support of the NILs will be moved to task TNA4.1 Community Outreach**Affected partners**: NGIs |
| **NA2.3 Strategic planning and policy support** | New* Business development to consolidate EGI Solutions: solutions lifecycle, PKIs, PoC of business models, coordination with the technical outreach team and the human networks for the promotion of the solutions.

Continues* Tracking the scientific output for scientific impact evaluation through openAIRE services
* development of the final sustainability plan
* new MoUs (monitoring of existing ones at reduced effort)
* EGI Compendium (reduced effort)

Stopped* DRI ERIC
* Secretary support to EGI policy groups
* Scientific peer review (responsibility of implementation of a EGI distributed resource pool moves to SA1
 | Activity continues at EGI.eu (NA4.3)Stopped* Security policy development and EGI representation at EUGridPMA continue outside of the project as EGI Core Activity

**Affected partners**: No effort for STFC and FOAM |
| **TNA2.2 Promotion and Communication** | * Concentrate effort on events for outreach to new user communities according to the priorities defined by the technical outreach team
* Collaborate with business development (TNA2.3)

**Affected partners**: Reduced effort at EGI.eu | Changes: * Focus activities on communication for outreach to communities and business development

**NA4.3****Affected partners:** effort is allocated to EGI.eu (from EGI.eu unspent budget or NGI unspent budget) to continue a minimum set of communication activities |
| **TNA2.4 Event Management** |  | **NA4.1*** Support Community Forum 2014 and a community workshop
* Support human networks (this includes NILs formerly NA2.1 and NGI operations managers formerly SA1.1), research and technology champions
 |
| **TNA2.5 Technical outreach to new user communities** | Define outreach plan for PY4 and PY5 to drive TNA2.2 priorities**Affected partners:** no effort changes | CRM support stopsMaintenance/development of AppDB and TMP moves to JRA2 **Affected partners:** LIP, CSIC, GRNET. Effort levels will be defined according to the technical roadmap |
| **TNA2.6 Distributed Competency Centre** | New* Establish a new network of Technology Champions with the contribution of user communities and technology providers
* Involvement of Technology Champions in the DCC

**Affected partners:** Effort of NGI inactive partners will be transferred to theEGI.eu Travel budget to establish a partnership with external partners | **TNA4.4****Affected partners:** EGI.eu, NGI |
| **SA1** |
| **TSA1.1 Activity Management** | None | The support of NGI operations managers moves to **TNA2.1** Human Networks**Affected partners:** NGIs |
| **TSA1.7 Support** | New* NGI effort can be booked to participate to the Distributed Competency Centre for support of new user communities

**Affected partners:** NGIs | The available effort for support is refocused to outreach and moved to **TNA4.4** to support the Distributed Competency Centre**Affected partners:** NGIs |
| **All other SA1 tasks** | None | Global tasks are supported externally as EGI Core Activities. Remaining SA1 effort of active NGI will be allocated to:* Outreach through participation to the NGI Distributed Competency Centre (NA4.4)
* Federated Cloud (SA6)
* Business models and pay per use (SA6)
* Mini Projects (SA7)

**Affected partners:** NGIs |
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|  |
| --- |
| **SA2** |

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| **TSA2.6 Federated Cloud** | None | Moves to **SA6**. This activity can be supported by remaining NGI SA2 effort in PY5 for current SA2.6 partners, and/or by allocating unspent NGI budget.* Technical evolution of the services
* PoCs
* Operations

**Affected partners:** SA2.6 partners |
| **All other tasks** | None | All other tasks become EGI Core Activities and are externally supported**Affected partners:** SA2 global task partners |
| **SA6 Federated Cloud and business development** |
| **SA5.2 EGI Federated Cloud** | New in PY5 | **SA6*** Operations
* Development

**Affected partners:** NGIs. NGI effort is refocused on business models for NGIs interested in engaging into this activity. |
| **SA5.3 Business Models** | New in PY5 | **SA6*** NGI and/or RC and user community participation to the experimentation of new business models

**Affected partners:** NGIs. NGI effort is refocused on business models for NGIs interested in engaging into this activity. |
| **JRA2 Tool development** |
|  | New in PY5 | New* AppDB, TMP (to be verified), SAM, Accounting

**Affected partners:** effort allocated to CNRS**,** GRNET, STFC, SRCE. The final list of activities to be supported will be depend on the availability of funding and the development priorities |
| **SA7 Mini Projects** |
|  | New in PY5 | New* Mini Project (cloud, outreach, business models, new PoCs)

**Affected partners:** effort allocated to NGIs and EGI.eu according to 1. The availability of funding and 2. The expertise and interest in participation of the NGIs |

# Changes to PY4

Changes are proposed to the DoW in PY4 to meet some of the reviewers’ recommendations:

1. REC 1. “**It will be essential to maintain the strategic planning activities. The Strategy and Policy team should continue working at their current pitch and quality, which are now proving very effective**.” This task at EGI.eu will continue but at a reduced level of funding at EGI.eu. This is necessary to ensure the continuation of strategic and policy planning during PY5 of the project. A subset of the current activities will be continued in PY4 and PY5. Other activities will be put on hold, or continued as EGI Council policy activity if possible. due to the need to ensure the evolution focusing on supporting planning activities (e.g. EGI Compendium, Product management lifecycle, metrics/KPI, pay-for-use and associated legal models). Effort will be reduced in areas such as MoUs and supporting internal policy groups.
2. REC 5. “**It would be pertinent to consider a robust business development function at executive level in the management team**.” This function will be provided through EGI.eu and will closely interact with technical outreach activities to new user communities and the communication team. This function will be implemented in PY4 and it is proposed that its support will continue in PY5.
3. REC 6. “**It is crucial to maintain and extend the targeted outreach work to new communities**

**and also to carefully consider the new technological requirements and opportunities**

**these communities bring with them**.” Outreach activities will be strengthen through the extension of the contribution to the Distributed Competence Centre to user communities, technology providers, and by allowing NGIs to book effort not only in task NA2.6 but also SA1.7. Mini Projects will be supported in PY5 to study new service PoCs and to fund specific outreach activities.

The following sessions describe the changes proposed to the DoW in PY4.

## NA2

### TNA2.2: Promotion and Communication

Activities continue as in PY1-PY3, but with a closer cooperation with the Policy and Strategy team at EGI.eu to ensure that the EGI Solutions are properly promoted. Participation to events will be defined according to the priorities for technical outreach.

### TNA2.3: Strategic Planning and Policy Support

This task at EGI.eu will continue at a reduced level at EGI.eu, new activities will be started, others will be run at a reduced level at EGI.eu or will be stopped.

During PY4 and PY5, the main focus of this activity will be:

1. Consolidate the EGI service and solutions portfolios by sourcing business development expertise that will support the definition of a mature lifecycle process integrated with KPIs and business models for sustainability. This includes activities around market analysis, definition of proofs of concepts of new services and definition of business models to generate revenue streams.
2. Coordinate with the Marketing and Communication Team and the related Human Networks to ensure proper promotion of the EGI solutions and with the EGI.eu Technical Outreach Team to feedback requirements into the evolution roadmap;
3. Completion and adoption into the EGI processes of the OpenAIRE services to enable the community to track the scientific output for scientific impact evaluation and open access;
4. Development of the final sustainability plan including the identified solutions, their business models and possible revenue streams.

Consequently, to ensure available effort, the following activities will be put on hold:

1. The DRI ERIC initiative was well developed and disseminated in the key policy bodies, further work requires commitment and active engagement from other e-Infrastructures;
2. Secretary support to policy groups will be suspended and will be sourced internally among the group members, limited support will be provided to maintain the policy development process;
3. The EGI Compendium will focus only on the data collection, the analysis and publication will be performed only if resources outside this activity can be found;
4. The monitoring of MoU execution will be done on a best effort basis and more responsibility will be delegated to the key technical contacts, the dedicated annual report will not be published.

### TNA2.4: Technical outreach to new user communities

The team at EGI.eu in collaboration with the NILs will be responsible of defining the outreach priorities and strategy for PY4 and PY5 to concentrate available effort on new user communities that have significant impact.

### TNA2.6: Distributed Competency Centre

Since PY2, under the NA2.6 task of the EGI-InSPIRE project a Distributed Competency Centre (DCC) already exists across the NGIs to provide human and technical assets for Virtual Team projects. During PY4 this Distributed Competence Centre will be revitalized.

1. VT effort will be concentrated on the support of new user communities by focusing its use to activities and projects that help the EGI community identify, reach out to, engage with and support new communities
2. Outreach to new user communities will be prioritized in collaboration with the NGIs to ensure critical NGI mass around the support to new communities and to concentrate effort on new communities with significant impact in the short and medium term.
3. Participation to the Competency Centre will be strengthened by extending it to Technical Champions from existing user communities and technology providers according to their expertise and interest in participated to the DCC. Travel support will be granted to the Technical Champions. Expressions of interest in participating will be collected through the User Community Board and the Technology Coordination Board. NGIs will be allowed to also book effort from activity TSA1.7 Support to integrate existing effort already available to NGIs within task NA2.6.
4. Information about available expertise across NGIs, User Communities and Technology Providers will be collected to define the technical support skills and assets that exist in the DCC.

The interaction between the DCC and Business Development, the NILs and the Champions is illustrated in the following diagram.



## SA1

### SA1.7: Support

In PY1-PY3 effort in this task was concentrated on support to Resource Centre administrators and existing user communities. From PY4 NGIs will be allowed to book effort in this task to participate to the Distributed Competency Centre and reinforce the existing effort available in task NA2.6.

# PY5

An extension of EGI-InSPIRE of 6 or 8 months will take place. The following sessions describe the activities proposed in PY5.

## From EGI Global Tasks to Core EGI Activities

All EGI Global Tasks will cease at the end of PY4. From 1st May 2014 the agreed Core EGI Activities (as agreed by the EGI Council) will continue *outside* the reporting channels and management of the extended EGI-InSPIRE project and be reported and paid for through EGI.eu only. The Core EGI Activity taking place outside of EGI.eu will be complemented by staff at EGI.eu funded by the participation fee and staff funded by EGI-InSPIRE. Some of the work previously funded as EGI Global Tasks will continue as ‘normal’ project activities within EGI-InSPIRE PY5, with the view that funding for these will continue in follow-on projects. These activities are not Core EGI Activities. This change affects activities SA1 and SA2.

Governance, effort, costs and activity reporting around the Core EGI Activities will be made directly to EGI.eu and the EGI Council. These reports can be made available to the EC reviewers as ‘evidence’ at EC reviews to show the contribution made by the EGI Community to providing a sustainable production infrastructure for distributed computing in Europe. It is expected that these activities will form part of the complementary effort the EGI Community makes alongside current EC projects (the EGI-InSPIRE extension) and future EC project activity. This would amount to an estimated contribution of €2.4M in cash and in-kind by the EGI Community to European coordination activities alongside future EC projects.

* **Action EGI.eu (TF/CB/CG): Specify the reporting processes needed for the Core EGI Activities**

## NA4 Community Engagement

The Community Engagement work package will refocus its efforts around establishing and supporting EGI’s Human Networks and the NGI Distributed Competency Centre for outreach to new user communities.

### TNA4.1: Activity Management

This task will have effort at EGI.eu to manage the coordination of the different tasks at EGI.eu and for supporting **Human Networks**.

This task is refocused around the coordination, management and expansion of EGI’s human networks in order to develop and support our outreach to new research communities. These human networks are therefore provided as a service for use by different functions within EGI to reach out to different stakeholder groups.

The Human Network will include:

* NGI Operations Managers
* NGI International Liaisons
* Research Champions
* Technology Champions

The Research and Technology Champions will be managed directly by EGI.eu as they do not fit within the NGI structure. The management includes the activities needed to reinforce and to grow these human networks and includes the relevant mechanisms for their selection and support (e.g. monthly meetings, arranging technical content for webinars, virtual hackathons, etc.).

For NGI partners who are able to be active partners (i.e. report effort and complete a Form C) in the extension, travel funds and staffing effort will be delegated to the partner. For inactive partners the funds will be administered by EGI.eu.

**Action PMB: One event (Helsinki) if a 6 month extension and a October/November workshop (if an 8 month extension)**

The coordination of this activity will remain at EGI.eu. Those partners who are able to be active in PY5 *and* are willing to commit to NGI Operations Manager and/or NGI International Liaison roles will receive support for their staff. In addition to staff at EGI.eu, TNA2.4 will fund:

* Provide travel support through EGI.eu’s Central budget of Research and Technology Champions: 1 trip quarter/person

For NGI technical leadership (Operations Managers & International Liaisons), fund at maximum EC rate for active project partners (including staff and travel) and 100% travel for partners providing voluntary unfunded effort. Travel is estimated at 1 trip/person plus attendance at the Community Forum 2014.

### TNA4.2: Marketing and Communication

This task will be based at EGI.eu and continue from PY1-3 activities but at a reduced activity and effort focusing on:

* Closely targeted communications material for the different human networks (e.g. bulletins, news items, social media)
* Communicating and promoting EGI’s activities at user targeted events according to the priorities for outreach to new communities (e.g. booths, materials, talks, poster templates)
* Offering training around communications and other topics to the human networks
* Assessing the impact of outreach through the human networks
* Promotion materials based on use cases in the AppDB
* Promotion of community activities (e.g. scientific paper repository, scientific use cases, federated cloud)
* Articles in user facing publications (e.g. project newsletters, iSGTW)

Outreach efforts targeted to heavy user communities (i.e. in the newsletter, via the news channel) and the operations and resource provider community will not be a priority, instead the focus will be on new user communities. Policy focused outreach will be reduced with no further articles for top-level policy publications or high-cost booths at general policy events. In-house graphic design activity will be significantly reduced.

* **Action NoN: Assess effort and central budget required for events and printing.**

### TNA4.3: Strategic Planning and Policy Support

This activity continues as in PY4 with the exception of Security Policy development and EGI representation in EUGridPMA, which are externally supported as EGI Core Activities. The affected partners are FOM and STFC.

### TNA4.4: NGI Distributed Competency Centre

Support off the NGI Distributed Competency Centre continues and will be funded through:

* Unspent budget of active partners already contributing to the DCC;
* Other NGI unspent budget.

## SA6 (New for PY5)

This work package replaces SA1 which stops. The operational coordination of EGI’s production infrastructure that takes place at EGI.eu and the supporting services needed to federate national infrastructures at a European level will become an activity that now takes place outside of the EGI-InSPIRE project structure. It will be a complementary activity funded directly and solely by financial contributions by all participants in EGI.eu and partial in kind contributions from those hosting the Core EGI Activities.

### TSA5.1: Activity Management

This task based at EGI.eu focuses on the management and reporting of the activity taking place just in the work package.

### TSA5.2: EGI Federated Cloud

This task focuses on the operational and technical evolution of the EGI production cloud services, both in terms of capacity and new services. This will be achieved by supporting new resource centres in their transition to providers of production cloud resources, and supporting new user community in their implementation of use cases in the cloud infrastructure. The task supports also the technological evolution of existing cloud services and the expansion of the technical solution portfolio offered to cloud users, by exploring more flexible and transparent cloud storage and network services, with the purpose of deploying a proof of concept of the new services.

This task also supports the operations of the tools needed to integrate the cloud resources in the EGI production infrastructure, namely a SAM box for the services availability monitoring.

**Action DW: Review current activity and determine the effort levels and the work needed to operate on a production basis and evolve during 2014.**

### TSA5.3: Business models

Support will be provided to NGIs to participate to the proof of concepts of business models related to the use of grid and cloud services like pay per use, whose investigation started in PY3. These will benefit from tools for resource application and allocation demonstrated as outcome of development activities taking place in activity SA4 during PY4.

## SA7 Mini Projects (New for PY5)

Activities supported by Mini Project will need to be in one of the following areas:

* cloud,
* technical outreach to new user communities,
* business models,
* new service Proof of Concepts

Effort for this activity will be allocated to NGIs and EGI.eu according to

* The availability of funding
* The expertise and interest in participation of the NGIs
* The outcome of the mini project review

## JRA2 Tools (New for PY5)

This new activity will support the maintenance and/or development of a subset of community and operations tools: AppDB and TMP (previously supported in TNA2.5), SAM and Accounting (previously supported in JRA1).

* AppPDB and TPM are not part of the EGI Core Activities. Further developments of the service will be mainly focused on the the Virtual Appliance Marketplace extension. This will ensure that the Virtual Appliances extension of the Applications Database fits and are interoperable with the services of the EGI Federated Cloud platform.
* TPM: the future development activities are being assessed.
* SAM: maintenance of the current SAM tool is supported as EGI Core Activities. Support of SAM will be discontinued by CERN after April 2014. For this reason, JRA2 will support the further development of SAM to complete the work already supported through the Availability Mini Project.
* Accounting: the maintenance of the APEL central repository and the portal will be part of the EGI Core Activities. JRA2 will fund development activities deemed necessary to support other strategic activities
	+ Cloud Accounting
		- Revision and extension of the cloud accounting usage record.
		- Storage accounting for transient data storage.
	+ Data usage accounting
		- Storage accounting for transient data storage.
		- Data usage accounting GPGPU: extending the UR supported by APEL to include GPGPU usage.
		- Adoption of OGF UR v2
	+ Pay per user: extend the development of PY4
	+ CPU accounting: Migration for OGF UR v2