EGI Engagement Strategy

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**Abstract**

This document describes the Engagement Strategy of the EGI community. EGI Engagement reaches out to scientific communities, to national initiatives, to the long tail of science as well as to SMEs and industry and supports them in tackling scientific challenges using reliable and innovative ICT services and solutions. The strategy coordinates EGI members’ activities to accomplish this complex mission, ultimately contributing to the European effort of building a sustainable digital e-infrastructure ecosystem for research. The Engagement Strategy describes the specific goals of the EGI engagement activity, details the various tasks that this activity involves, provides information about the human networks and online resources and tools that help the community implement this strategy, as well as provides an action plan for the next period, June 2015 – April 2016.

Feedback to: support@egi.eu.

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**Document Log**

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**Application area**

This document is a public report produced under the coordination of the EGI Technical Outreach Manager under the EGI-Engage project with guidance from the “EGI Engagement Advisory Board”, a body which includes representatives of the existing and prospective EGI user communities and user-facing activities.

**Terminology**

A complete project glossary is provided at the following page: <http://www.egi.eu/about/glossary/>.

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# Introduction

Science today is no longer exclusively produced in single research labs or within national boundaries. Modern scientific challenges call for integrated solutions, cross-country collaborations and computing power with flexible usage to analyse vast amounts of data. E­infrastructures allow scientists to share information securely, analyse data efficiently and collaborate with colleagues worldwide.

EGI operates one of the largest, collaborative e-infrastructures in the world. EGI supports the digital European Research Area (ERA) through this pan-European infrastructure, its innovative technological building blocks, and related support teams and networks for users. These all together offer reliable ICT services, which provide uniform, cost effective, user oriented and collaborative access to computing and data storage resources in more than 30 countries. EGI’s mission is to help scientists to make the most of the latest computing technologies, such as clouds, big data and grids.

In this respect sustainability is an essential consideration for e-Infrastructures and scientific communities that such infrastructures support. Many of these scientific communities have research agendas measured in decades and need to be assured of the continued operational presence of the e-infrastructures that they adopt to support their work. EGI’s sustainability plans have become increasingly coupled with its long-term strategy: connect researchers from all fields of science with the reliable and innovative ICT services from EGI that they need to undertake their research. Evolving these services according to researchers’ needs is also inevitable, to continue providing value for research and science in Europe. Engagement is a key activity in EGI to achieve these goals. EGI Engagement has to:

1. Identify scientific communities from academy and industry that could break current scientific barriers with the use of EGI services and solutions.
2. Reach out to, and carry out discussions with these communities about ICT technologies to understand and capture details of their e-infrastructure use cases and requirements.
3. Help these communities tackle scientific challenges with the use of existing EGI solutions and by new solutions brought into, or developed within EGI as required.
4. Support scientific communities during the whole process they need to go through to become active and self‑sufficient users of EGI services and tools.
5. Act as a meeting point for research communities, a community of communities, where information and experiences relating to e-infrastructure application and adaptation can be shared.

# Target groups

EGI Engagement needs to establish partnerships with researchers of the ERA. Researchers can be engaged with at different levels. The Engagement Strategy needs to know the specific characteristics of these levels in order to be able to choose suitable and effective engagement approaches and priorities.

## Research Infrastructures

EGI provides a world-class e-infrastructure that can support researchers in pushing the frontiers of science, in particular within areas with massive data or computational requirements. In the next two years a growing number of Research Infrastructures (RIs) from the ESFRI roadmap[[1]](#footnote-1) and from national roadmaps are expected to reach implementation or operational stage. These RIs as well as the Future and Emerging Technologies (FET) Flagship Initiatives[[2]](#footnote-2) are already exploring needs of their user communities and thus they are key instruments in bringing together a wide diversity of stakeholders to look for solutions to many of the problems science is facing today. Given their international nature and awareness of the benefits of e-infrastructures the European RIs and Flagships, their preparatory projects, and other similarly large, multinational and structured scientific collaborations are considered as the primary long-term beneficiaries of EGI services and therefore the prime targets for EGI to engage with. RIs come with some advantages, and disadvantages, which need to be considered when engaging with them.

Advantages:

* Usually one point of contact exists per RI for ICT / e-infrastructure-related matters, for example a technical coordinator.
* Requirement gathering should be simpler and can build on the established network of contacts within the RIs.
* Acceptance and integration of EGI into the internal plans of the RIs should lead to a long term partnership between e-infrastructure and research infrastructures.
* Awareness of their problems and typically also of the benefits of using e-infrastructures in addressing them.
* More likely to have some internal expertise that can work with EGI and speed up collaborative work.

Disadvantages:

* Convincing a large community of an outside solution can be difficult and effort-intensive.
* RIs sometimes need to work with existing/previously chosen tools and EGI needs to integrate these to achieve technical compatibility.
* The full pay off (i.e. scientific breakthrough enabled by EGI solutions) may not be seen for a number of years.

## Research Collaborations

A second target group for EGI Engagement is the large number of highly dynamic, small-medium size research collaborations and research networks. These are typically represented by FP7 or H2020 projects at the European scale, and by similar-size national projects at the national scale. Unlike RIs and Flagships, these groups may scarcely, or not be aware of e‑infrastructures and their benefits to science, so discussions have to start at a more basic level. Such collaborations come with different unique advantages and disadvantages that need to be recognised by EGI when engaging with them.

Advantages:

* Being usually more flexible on using new technologies and tools.
* Bringing new insights and tools that could have a wider use.
* Be the possible first step in integrating a much wider community.
* Be more suited to establish spinoffs and start-ups.

Disadvantages:

* Could be not as big a pay off from a usage perspective.
* May not be aware of their e-science problems and the benefits of e-infrastructures.
* Requirement gathering may not be straightforward because of the lack of structure/connection among groups.
* Might be lacking in technical expertise.

## Long tail of science

A third target of EGI Engagement is the very small research teams and individual researchers who work on their own research agendas or personal research tasks. They are typically unaware of e-infrastructures, and despite they could in general benefit from e-infrastructures, they are likely to require only a very small subset of the services and functionalities that e-infrastructures can offer, and are likely to need these for a relatively short period (days or weeks). Their focus is more on pursuing personal research agendas then contributing to a structured scientific collaboration. Working with the long-tail of science comes with different unique advantages and disadvantages that need to be recognised by EGI when engaging with them.

Advantages:

* Successful examples of serving members of the long-tail in many, if not all of the NGIs.
* Require only a limited set of services from e-infrastructures – typically HTC, HPC and cloud services for individualistic computing without collaboration capabilities.
* A very significant source of innovation and innovative research results.

Disadvantages:

* Very difficult to tell who and when belongs to this group. The long-tail is invisible and has no identifiable contacts for pro-active engagement.
* Difficult to measure scientific outcome of the long-tail and the impact of e-infrastructures on this.
* Most of its members lack the technical expertise in using e-infrastructures. Support can be very effort intensive if considered for the whole length of the long-tail.
* May not be aware of e-infrastructures and that some of their problems can be served by e-infrastructure services.
* Requirement gathering is very difficult because of the very loose link to the long-tail and because of the dynamics of these users accessing the infrastructure.
* Most of the EGI-related national and European projects that provide support for the long-tail are coming to an end in 2014-2015.

## SMEs and industry

There is a renewed requirement for stimulating the knowledge transfer activities and outcomes produced in science and scientific innovation into business and society. This requirement are in many cases translated into requisites for funding for EGI members in such a way that knowledge transfer is not anymore a nice-to-have, but has become essential for sustainability/survival. Moreover, H2020 programmes include an ‘impact’ section that aims to go beyond the exploitation and dissemination plan at the end of each project. From now on, EGI-related H2020 proposals need to demonstrate that outcomes have a positive impact onto business and society from day 1 of the initiative. Strengthening the relationship with the business sector EGI is also fundamental part of the Open Science Commons strategy[[3]](#footnote-3) and a way to show the leadership that has been asked to take.

In order to achieve this, EGI needs a network of people with skills in business development, backed with specific, co-ordinated organisational structures, and dedicated personnel resources to establish fluid and sustained relationships with other partners for the creation of these value networks. One of the main issues to-date was having no dedicated effort within the EGI community to reaching out to the private sector. In spite of some efforts and some encouraging examples, the initiatives for business engagement have not yet progressed towards any meaningful impact. At local level there are few good examples, but they are the result of the individual initiative of some NGIs that have a clear mandate by the national or local administration, which is not the case in many other NGIs. Despite EGI members have for many years engaged a variety of research communities with mature structures, procedures and expertise for this engagement, but there is no structure or procedures for business engagement, which includes activities such as identifying the SMEs with interest to collaborate, have a clear value proposition, and create a formal engagement relationship with its associated business model.

The EGI community recently defined a ’Business Engagement programme’[[4]](#footnote-4) to help the community overcome these barriers. The programm is a framework underlying the specific future joint activities between EGI members and the different representatives of the business sector. The programme defines:

* Potential areas of collaborations between EGI members and industry:
  + Promotion
  + Market intelligence
  + Networking
  + Access to dedicated consultancy and support
  + Exploiting EGI services for pre-commercial R&D
  + Testing proof of concepts
  + Developing added-value services for reusing open research data sets.
* Provides details on the various benefits that engagement between EGI and industry would bring to the parties:
  + Increased visibility on a European and global scale.
  + Access to key information to relevant European policies.
  + Possibility to develop new products and technologies to enhance your product portfolio.
  + Adoption of new and innovative technologies.
  + Reduction of learning curve and ensuring faster and trustable results.
  + High rate of Return on Investment (ROI) for consumer partner.
  + Greater potential market for commercial services as academia moves from CAPEX to OPEX model.
  + Opportunity to expand and strengthen the customer base with new and repeated clients.
  + Access to market intelligence to gain competitive edge.
  + Possibility to provide direct input to shape future services of EGI for business opportunities.
  + Opportunity to contribute as a partner to proposals for funded projects.
* A three-tier structure for engagement that would provide formalisation of the collaboration activity and make easier starting the common activities at a local and European level:
  + EGI Business Engagement Programme Member
  + EGI Business Associate
  + EGI Business Partner
* An activity plan to implement the programme. The plan consists of
  + A promotion plan to raise awareness about engagement opportunities with EGI within the business community.
  + Establishing a network of business engagement experts within EGI. The network would be responsible for implementing and evolving the EGI Business Engagement Programm, including identifying funding opportunities.

# Engagement approaches

## The blueprint

EGI operates as a community of communities to facilitate the sharing of knowledge and services for establishing the digital science ecosystem in the ERA. This is achieved via collaborations with communities of research infrastructures, FET flagships, research collaborations, the long tail of science, SMEs and industry. EGI Engagement has to identify and reach relevant members of these communities, communicate relevant and impactful messages about the opportunities and benefits that collaboration with EGI could bring, deepen relationships until the exact scope and conditions of collaborations with mutual benefit are understood, and finally implement and maintain the relationships to bring benefits for the stakeholders. This process can be defined in a generic way and used as a blueprint to implement specific engagement plans with each of the various types of communities that have been identified in the previous section. The blueprint is depicted in Figure 1 and it consists of three phases:

1. **Outreach**: This phase identifies those communities of the ERA whose engagement with EGI could bring mutual benefit for both parties as well as to the ERA as a whole. Using communication and marketing approaches this phase raises awareness of EGI within the new community, and generates interest towards collaboration with EGI (e.g. to use specific EGI solutions in the context of the given research infrastructure). While some of these communities (or individuals from these communities) can immediately become users/partners/contributors of EGI by simply following the guidelines and tutorials that exists on the EGI and NGI websites, complex partnerships typically requires further discussions between EGI representatives and the new community. These ‘support cases’ are handed over to, and followed up in the second phase of the engagement workflow[[5]](#footnote-5).
2. **Scoping**: In this phase engagement with the new community is deepened and details about the requirements, constraints, possible solutions or contributions of the parties are exchanged and understood. An implementation plan is defined[[6]](#footnote-6) to capture the scope, timeline and other aspects of the collaboration that will result in the integration of this new community with EGI. The primary output of this phase is an integration plan endorsed by both the EGI community and the prospective partner community. The plan is handed over to the third phase of Engagement.
3. **Implementation:** This phase initiates, and then executes the integration project based on the endorsed plan. During execution the project is monitored by EGI.eu to ensure timely delivery, to recognise deviations and to initiate corrective actions. The project – after successful completion – results a new, integrated community in EGI together with any technical or other setup that was needed to complete the work. These outcomes directly benefit the integrated community to tackle scientific challenges, and benefits existing and prospective new partners of EGI in the form of reusable, customisable systems.



Figure . EGI Engagement process

### Outreach

This phase uses communication, marketing and proactive outreach techniques to communicate and disseminate EGI solutions to communities within the ERA, with the main goal to raise awareness within these communities about how these solutions could help them overcome their current problems. To be effective, this activity has to use both online and offline (face-to-face) mechanisms, and must involve a large number of experts who convey messages from EGI to the various target groups. These experts and their involvement in the Outreach phase are the following:

* EGI.eu staff:
  + Prepare online (web) and offline (printed) materials about EGI and its services that emphasise the benefits of these solutions to science, and thus can attract the attention of scientific communities of the ERA. Keep the materials up to date using input and feedback from the community.
  + Identify prospective partner/target communities for EGI within the ERA, proactively engage with them to promote EGI to their representatives using the most suitable message format and channels, such as web, email, conferences, exhibitions, ‘cold calls’.
  + Coordinate the distribution of materials, and the promotion of EGI within the NGIs through the International Liaisons (NILs), the Distributed Competence Centre (DCC) and the EGI council.
  + Coordinate the distribution of materials, and the promotion of EGI within scientific communities through the Champions, the User Community Board (UCB) and at EGI and community events.
  + Capture details of emerging engagement cases and hand these over for follow-up to those who are active in the Scoping and Implementation phases. (Follow the guidelines in <https://documents.egi.eu/document/2478>)
* NGIs and Competence Centres (NILs, CCs, council):
  + Using content and templates from EGI.eu, and from the NGIs prepare online (web) and offline (printed) materials about EGI and NGI solutions to the attention of members of the ERA. Keep the materials up to date based on input and feedback from EGI members and national partners.
  + Identify prospective partner communities for EGI and NGI from the ERA, but primarily in your country, and promote EGI/NGI opportunities to them using the most suitable message format and channels, such as web, email, conferences, exhibitions, proactive ‘cold calls’.
  + Provide feedback to EGI.eu on a regular basis about progress and achievements in community engagement and the achievements made available within these communities with the support of EGI.
  + For NILs: Coordinate the distribution of materials, and the promotion of EGI/NGI within the country and report back about this on a regular basis to EGI.eu.
  + Capture details of emerging engagement cases and hand these over for follow-up to those who are active in the Scoping and Implementation phases. (Follow the guidelines in <https://documents.egi.eu/document/2478>)
* Other communities in EGI (Champions, UCB, projects with EGI MoU, etc.):
  + Promote EGI within your community using the most suitable message format and channels, such as presentation at conferences, leaflets/demos at exhibitions, email lists, websites, social networking, etc.
  + Publish scientific papers or other impactful materials that acknowledge EGI/NGIs for the resources and services that enabled scientific progress.
  + Use the online and offline promotional materials provided by EGI.eu and help us keep these up to date.
  + Provide feedback to EGI.eu on a regular basis about progress and achievements in engagement within your community.
  + Capture details of emerging engagement cases and hand these over for follow-up to those who are active in the Scoping and Implementation phases. (Follow the guidelines in <https://documents.egi.eu/document/2478>)

### Scoping

During this phase engagement with prospective communities is deepened, and formalised in a project plan that describes the focused activity that the new community and EGI wants to carry out jointly. During this process the technical challenges and/or opportunities of the new community must be captured, understood, and matched with possible solutions and/or needs in EGI. The project initiation document must be endorsed by the representatives of both EGI and the new community, and then handed over for execution to the ‘implementation phase’. The members who are involved in the scoping phase and their responsibilities are:

* EGI.eu staff:
  + Provide guidance and templates for project formalisation (as required: template for project initiation document, Virtual Team project, MoU, etc.)
  + Invite relevant experts from EGI and the broader e-infrastructure communities to participate process of collecting and analysing the needs, opportunities and constraints for joint work with the new community (from the Competence Centres, NGIs, partner projects, etc. as required)
  + Get approval and support for the integration project from EGI, and from scientific communities.
* Members of the new community and members of EGI:
  + Capture and analyse the technical challenges and requirements of the integration
  + Participate in the technical analysis
  + Identify solutions by which the requirements can be addressed, offerings can be integrated/matched
  + Contribute to project initiation document
  + Approve project initiation document

### Implementation

During the implementation phase the integration projects are instantiated according to the plans, then executed. The projects are monitored by EGI.eu staff to ensure progress and to initiate corrective actions (such as update to project plan) if required. Compared to previous phases the execution of projects may require a different set of members. These members, their commitment level (e.g. hours/week), and expected contributions to the project should be defined as much as possible already in the project initiation document. The responsibilities of project members are:

* EGI.eu staff:
  + Help the project choose a coordinator.
  + Support the coordinator as required, e.g. monitor the project and if necessary initiate corrective actions (e.g. change to project plan).
  + Provide logistics support for the project (e.g. public website, email list, booking teleconference system for meetings, etc).
  + Contribute to project as required according to the project initiation document.
  + Disseminate project results.
* Other members of EGI and the new community:
  + Contribute to project as required according to the project initiation document.
  + Disseminate project results.

# Tools

Check that this is up-to-date.

A number of online resources and tools exist to support the execution of the Engagement strategy. These are:

* Repository of communication and marketing materials and templates: <http://www.egi.eu/news-and-media/publications/>
* Registry of upcoming events that can be relevant for EGI members to attend and promote EGI (with planned contributions from EGI): <http://wiki.egi.eu/wiki/Research_Conferences>
* To see an up-to-date picture of the support cases that are currently in the Engagement workflow, please go to <http://go.egi.eu/technicalsupportcases>. (An RT queue with public access)
* How to capture details of a new engagement case that should be followed up in EGI:
  + Capture the case in the technical-support-cases RT queue, as described in this document: <https://documents.egi.eu/document/2478> OR
  + Report back during the regular (monthly) Engagement board teleconferences OR
  + Send details in email to [support@egi.eu](mailto:support@egi.eu)
* Regular meetings for the Engagement Board:
  + <https://indico.egi.eu/indico/categoryDisplay.py?categId=36>
* Email lists:
  + NILs: [ngi-international-liaisons@mailman.egi.eu](mailto:ngi-international-liaisons@mailman.egi.eu)
  + Champions: [Champions-discuss@mailman.egi.eu](mailto:Champions-discuss@mailman.egi.eu)
  + UCB: [UCB-discuss@mailman.egi.eu](mailto:UCB-discuss@mailman.egi.eu)
  + Leaders of EGI-Engage Competence Centres: [egi-engage-wp6@mailman.egi.eu](mailto:egi-engage-wp6@mailman.egi.eu)
* NIL contact table: <http://www.egi.eu/community/ngis/NILs.html>
* Requirements Tracker: The evolution of the European Grid Infrastructure is driven by the users. Therefore capturing and following up feedback from users reached during Engagement is a key goal for all the three phases of the Engagement activity.
  + Capture the requirements in the ticket that represents the support case: <http://go.egi.eu/technicalsupportcases>
  + If no ticket exists for the case (i.e. community/project), then register it. For further information please refer to <https://documents.egi.eu/document/2478>.
* Templates for Virtual Team projects:
  + Description of Virtual Teams: <https://wiki.egi.eu/wiki/Virtual_teams>
  + Project initiation document template, and project final report template: <https://documents.egi.eu/document/1991>
  + VT project wiki page template: <https://wiki.egi.eu/wiki/VT_Template_Wiki_page>

# Plans for the next period (June 2015 - April 2016)

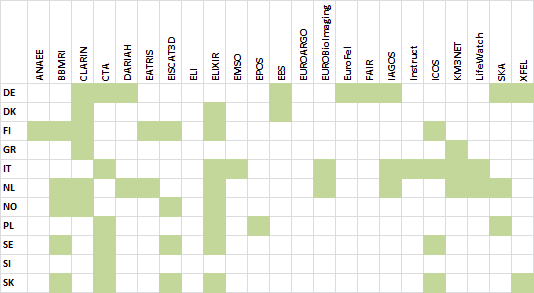
## NGI priorities (NILs and Council members to check)

An email survey has been circulated to the NGI International Liaisons of the current NGIs of EGI to assess their priorities in engaging with and supporting specific scientific communities and disciplines. The key elements of the received responses are summarised in the table below (Alphabetically ordered by NGI country code).

Note that information about national roadmaps for research infrastructures is also available at <http://ec.europa.eu/research/infrastructures/index_en.cfm?pg=esfri-national-roadmaps>, and some NGIs reported different (more up to date, or more historical) information about national roadmaps.

|  |  |  |  |
| --- | --- | --- | --- |
| NGI | Status of national roadmaps | Priorities | Next activity / possibility in EGI |
| BG | There is a roadmap that describes 9 RIs:  <http://www.mon.bg/?go=page&pageId=4&subpageId=53> | * Computational physics (fluid dynamics, semiconductor modelling) * Astrophysics (VOs) * CLARIN and DARIAH (BG-CLaDa) * BG-BBMRI (focus on HPC) * Environmental sciences (Climate change, Env. Protection) * Marine community * Integration of new HPC cluster (Xeon Phi cards and CPUs) | * Join DARIAH CC and BBMRI CC activities * Join federated open data for marine use case activity of EGI-Engage (JRA2.1) * Join GPGPU integration activity of EGI-Engage (JRA2.4) |
| CH | Switzerland has a roadmap, and the NGI is indirectly part of that roadmap as some of our activities are funded. | * To play a more active role as the "eScience Support Team" to offer the human component of eScience/eInfrastructure support. * ELIXIR and ATLAS |  |
| CZ | There is a national roadmap (<http://www.msmt.cz/file/26526/download>), and its new version is currently finalized, as a result of the international evaluation of the national infrastructures. CESNET and the largest computing centre in the Czech NGI (CERIT-SC) are included in the roadmap. | * No change since 2014: BBMRI, CTA, ELI, ELIXIR, EuroBioImaging, Instruct, ICOS. (With direct participation in ELIXIR) * Early engagement with LINDAT/CLARIN. * Supporting NGI users participating in HBP. * In contact with ELI. | Connect to ELIXR and BBMRI CC; ELITRANS project; HBP collaboration; |
| ES | There was a roadmap about the participation of Spanish nodes in ESFRIs, however funding got very limited to this in recent years. | * LifeWatch (already coordinates the respective EGI Comp. Centre). * DANUBIUS * eLTER * EMSO * Nanoscience | * Join forces with NGI Romania for harmonised activities for DANUBIUS. |
| FR | There is national roadmap and the objectives of France Grilles are defined accordingly to its point of view. | * No change since 2014: ANAEE, EISCAT3, ELIXIR, EMSO, EPOS, EURO-ARGO, EuroBioImaging, IAGOS, Instruct, ICOS, KM3NET, LifeWatch * Operating the DIRAC instance which supports aprox. 15 VOs, and an iRODS instance. | Already involved in the ELIXIR, EPOS and LifeWatch Comp. Centres. |
| HU | National roadmap does not exist. An expert group prepared a recommendation in November 2014 for the government on which ESFRI participations (from the 2010 roadmap) the government should support. Unfortunately the 2010 roadmap includes only PRACE as an e-infrastructure therefore the NGI is not recommended for support. | * Start a new project to build a federated cloud that serves Hungarian academic research institutes. (Based on OpenStack, HEXAA, WS-PGRADE, etc.) * Engage with business communities in Hungary (topics: agriculture, big data, automotive) * Implementation of a big data platform for agriculture in the Agrodat project. * Introducing cloud courses at 3 universities: Miskolc, Szeged, Óbuda. | * EGI to achieve that it’s included as an e-infrastructure on the European ESFRI roadmap so national roadmaps can include the NGIs. * Harmonise EGI FedCloud and Hungarian FedCloud. * Contribute to EGI cloud-related training with university courses. |
| PT |  | * Continue supporting HEP communities (incl. Auger and SNO++) communities. * EMSO, EPOS and LifeWatch – with Spain. * Neuroscience groups related to HBP * RNA sequencing groups (plants and animal), but with need more for HPC resources | The work being done at establishing bridges between EGI and RI / ESFRI's it's perceived as really helpful. As for infrastructure requests HPC federation would be major success together with some data federation. |
| RO | Report exists from 2008 and currently under update: <http://www.research.ro/uploads/imported/1242293614cric_eng.pdf>. NGI\_RO and the ARCAS association are contributing to the update process by making a survey on the computing requirements of the user communities and the existing resources (grid, HPC, cloud). This will result in a report on the national e-infrastructure for science and the user needs, and will be presented at the workshop "National e-infrastructure for science and its role within the  research infrastructure roadmap" (10-11.09.2015) | * Supporting WLCG collaborations (Alice, Atlas, LHCb) and HEP communities (ILC, Hone) * ELI-Nuclear Physics (eli-np.eu); Registering a new EGI site (GRIDFIN) * Nuclear & condensed matter physics (gridifin.ro) * Computational biology |  |
| UK |  | * To join up a number of activities which should provide a pipeline for researchers to move from local to national to international facilities, e.g. EGI, GridPP, EU T0, UK T0. | Prepare guidance through the EGI-EUDAT collab. on moving from national to international facilities. Make this reusable across NGIs and disciplines. |
| TR | Research infrastructure roadmap exists and it is part of the national development plan. Clinical RIs, automotive, renewable energy and photonics are priority areas in this. | * Operating Grid sites to serve the HEP community. * Recently started operating a federated cloud site to serve other national users. (e.g. Nanoscience to run Windows models) * Turkey is involved only in very few ESFRIs and the NGI did not have success with engaging with national nodes so far. Priority here is ELIXIR and Earth science. | The NGI to consider joining the EPOS and ELIXIR Competence Centre activities (as unfunded contributor/observer) |

A similar survey has been run among the NILs and Council members in 2014 to collect information on priorities for supporting research infrastructure communities. The below table presents the responses that have been received from those NGIs that did not respond to the 2015 survey.



## Action plans to engage with specific groups

The following sub-sections provide status update on engagement activities that will be in the focus for the EGI Engagement activity for the next period. All the cases are scoped at the European level, i.e. require harmonised activities at least from two NGIs and EGI.eu, and will benefit multiple NGIs. Information for these sub-sections have been pulled together from tickets that are stored in the ‘technical-support-cases’ queue of the EGI RT system. This queue was setup in April 2015 to track progress and development of international engagement and support cases across the EGI Community. Further information about the queue and its usage rules can be found in <https://documents.egi.eu/document/2478>.

### Action plan to engage with Research Infrastructures

The ESFRI Roadmap identifies new Research Infrastructures (RI) of pan-European interest corresponding to the long term needs of the European research communities, covering all scientific areas, regardless of possible location. The ESFRI roadmap is an ongoing process. First published in 2006, with 35 projects, it was updated in 2008 bringing the number of RIs of pan-European relevance to 44. The latest update focusing on projects dealing with energy, food and biology was published in December 2010.

The Roadmap 2016 update process was launched in September 2014 in Trieste. In the framework of this update, ESFRI is expecting proposals for new (or major upgrades of) research infrastructures of pan-European interest corresponding to the long term needs of the European research communities, covering all scientific areas. Proposals were submitted until 31rst March 2015[[7]](#footnote-7).

In parallel with adding new infrastructures to its roadmap, ESFRI also carries out an in-depth analysis of the research infrastructure landscape in all scientific fields in Europe. The landscape analysis will provide a comprehensive picture of the existing research infrastructures of pan-European scope, including the national/regional research infrastructures that operate international open access. During this analysis ESFRI identified priority projects which are mature enough to be under implementation in 2015-2016 and whose timely implementation is considered essential to extend the frontiers of knowledge in the fields concerned. Based on ESFRI’s landscape analysis the Council of the European Union issued a document[[8]](#footnote-8) in May 2014 to advice the member states on focusing their available national resources on prioritised projects. The document recommends support for 15 projects at three different priority levels (See table below).

To be aligned with the Council recommendation EGI should also focus its engagement and support activities on these 15 projects. The below table provides a summary of these 15 projects (in the same order as listed in the Council document), together with ongoing and suggested activities for EGI for the better support of these initiatives in the next period.

|  |  |  |
| --- | --- | --- |
| **Prioritisation of Support for Implementation** | **RI name** | **Ongoing/possible support activity in EGI** |
| Priority Projects for implementation | EPOS: European Plate Observing System | Preparatory phase of the EGI-Engage Competence Centre has started in March 2015 and continues until approx. Sep 2015. EGI members should join this activity to collect and analyse use cases and define technology plans for support. |
| ELIXIR: The European Life-Science Infrastructure for Biological Information | Preparatory phase of the EGI-Engage Competence Centre started in March 2015 and continues until Aug. EGI members should join this activity to collect and analyse ELIXIR use cases and to define respective support technologies through the ‘ELIXIR Compute Platform’ document. |
| ESS: The European Spallation Source | Members of the Swedish and Polish NGI started discussions with this community in 2014, however these did not reach mature status until now.  Representatives of EGI.eu should make high-level contact with the ‘Data Management and Software Centre’ division[[9]](#footnote-9) of ESS, based in Copenhagen. |
| Implementation support | ECCSEL: European Carbon dioxide Capture and Storage Laboratory Infrastructure | This RI does not seem to need any e-infrastructure component that EGI can offer. |
| EISCAT-3D: The next generation incoherent scatter radar system | EGI-Engage Competence Centre started in March 2015 with definition of a user portal that structures and makes available metadata and data from the EISCAT\_3D stations. |
| EMSO: European Multidisciplinary Seafloor & Water column Observatory | Initial contacts with this community have been established by the Italian NGI and EGI.eu. Collaboration will be scoped and implemented for joint activities in computing in the context of the Indigo DataCloud H2020 project. (Indigo is led by NGI Italy and EGI.eu is in the consortium.) |
| BBMRI: Biobanking and Biomolecular Resources Research Infrastructure | Preparatory phase of the EGI-Engage Competence Centre started in March 2015 and continues until Aug. During this period the members strengthen connections with the broader BBMRI community and identify relevant use cases from the community that can benefit from EGI services. One of these is foreseen to be the integration of the BioBankCloud PaaS with the EGI Federated Cloud. |
| ELI: Extreme Light Infrastructure | A new H2020 INFRADEV-3 project, titled ELITRANS, has been recently accepted by the EC to support the implementation of ELI. EGI.eu is in the project consortium, participating in the activity that will define the service layer for data and computing. Strong collaboration with NGI CZ, HU and RO are important in this activity, given that these three countries host the ELI sites. |
| CTA: Cherenkov Telescope Array | ??? Update needed - from PL, FR? |
| SKA: Square Kilometre Array | Different EGI members are directly or indirectly are collaborating with SKA:   * Members of LOFAR, one of the path-finder projects of SKA, are receiving support by IAA in Spain on the use of the EGI Federated Cloud. * EGI.eu is in discussion with ASTRON (NL) and SURFSara (NL) about introducing the ‘Science Data Centre Concept’ in both LOFAR and SKA, leading these projects to the cloud. |
| CLARIN: Common Language Resources and Technology Infrastructure | CLARIN already built its operational infrastructure consisting of identity federation, central services and contributed services. The contributed services are data and software applications and are grouped by certification level (indicating different levels of capabilities or qualities.)  CLARIN-ERIC is currently experimenting with one of the EGI Federated Cloud site to see whether it would be a suitable hosting resource for one of its central services, the Virtual Language Observatory.  Integration of community software with HTC/HPC and cloud resources is considered by the CLARIN-ERIC as national activities that should be explored and implemented by CLARIN nodes and the respective NGIs. |
| DARIAH: Digital Research Infrastructure for the Arts and Humanities | EGI-Engage Competence Centre started in March 2015. The core activity of the CC is the setup of a science gateway with compute and data catalogue facilities, on top of the EGI Federated Cloud. Two applications (one dataset and one real-time search) will be implemented in this gateway. Additional activities explored by EGI.eu and DARIAH are: (1) Re-use of the EGI collaboration services from CESNET for DARIAH; (2) Use of EGI Core services to operate central services for DARIAH; (3) Collaboration on developing e-infrastructure courses for digital humanities educational curricula. |
| Support for Sustainability and European Coverage | CESSDA: Council of European Social Science Data Archives | This RI does not seem to need any e-infrastructure component that EGI can offer. |
| SHARE: Survey on Health, Ageing and Retirement in Europe | This RI does not seem to need any e-infrastructure component that EGI can offer. |
| ESS ERIC: European Social Survey" | This RI does not seem to need any e-infrastructure component that EGI can offer. |

#### Action plan for Competence Centres (Comp.Centres to check)

Each of the EGI-Engage Competence Centres include activities aiming at engaging with the respective Research Infrastructure communities in order to maximise the exploitation of the results of the Competence Centres within those communities. For the next period the different Competence Centres are planning the following activities in this respect:

|  |  |
| --- | --- |
| ELIXIR | The CC is collecting use cases, requirements and priorities from the RI community to refine its workplan by   * Discussing use cases with the EXCELERATE INFRADEV3 H2020 project. * Collecting use cases from the CC member institutes (and their respective ELIXIR nodes). * Discussing possible use cases with the ‘Replicating life science reference datasets into EGI’ Virtual Team project. * Collecting input from ELIXIR, EGI, EUDAT and other communities through the ‘ELIXIR Compute Platform’ vision document. |
| BBMRI | The CC is collecting use cases, requirements and priorities from the RI community to refine its workplan by   * … BBMRI ELSI services?... |
| MoBrain | During the next period the CC will be focussed on technical developments in the following areas:   * Integrating the Scipion workflow enactor with the EGI Federated Cloud * Setting up a GPU testbed in EGI-Engage and integrating GROMACS and AMBER * Specifying then implementing an entry portal from the WeNMR and N4U solutions, in collaboration with WestLife VRE H2020 project.   User engagement activities will start approx. after month 6 (Sept 2015), with writing scientific publications and organising training courses and workshops focussed on the mentioned technical elements. |
| DARIAH | * The Competence Centre is working on establishing a ‘Working Group’ within DARIAH. This working group would provide better visibility, broader acceptance and possibly even external contributions to the CC from the DARIAH RI community. * The CC works on a questionnaire that will be used within the RI community to collect e-infrastructure requirements from digital humanities researchers and groups. The survey will be sent out in online form to DARIAH contact lists, and will be used to conduct 1-on-1 interviews with representatives of relevant DARIAH Working Groups. * The CC will co-locate its next meetings/workshops with the DARIAH VCC conference in spring 2016 and 2017, and with the EGI User Forums in autumn 2015 and 2016. |
| LifeWatch | Engaging with the LifeWatch community by   * …???… |
| EISCAT\_3D | During the next period the CC is focussed on specifying the scope and architecture of the web portal that would structure data and metadata from the EISCAT\_3D stations and would make these available for scientists’ queries worldwide. During the architecture definition activity the CC strongly collaborates with the EISCAT\_3D Support Project of the Nordic e-Infrastructure Collaboration (NeIC) that, among other things, develops Data Management and Processing Plans for EISCAT\_3D.  The annual EISCAT Symposiums remain the most important forum to engage with the broader RI community. (Sep 14-18, South Africa) |
| EPOS | The CC is currently in the process of engaging with relevant groups within the EPOS network and within its NGIs in order to collect technical components, user requirements and use cases towards defining an integrated system that can implemented by the CC members. …info on next steps… |
| Disaster Mitigation | During the next period the CC members will be focused on engaging with local communities in order to collect reliable data for the study of various forms of natural disasters, and to collect requirements concerning enabling international simulations. This activity targets scientific groups and institutes as well as governmental data providers as most appropriate.  The CC members also carry out internal training to inform each other on tools, services and techniques that are used and are available from the different countries for disaster prediction and mitigation researchers. |

### Action plan to engage with FET Flagship Initiatives

Future and Emerging Technologies (FET) is the ICT incubator and pathfinder for new ideas and themes for long-term research in the area of information and communication technologies. FET Flagships are ambitious large-scale, science-driven, research initiatives that aim to achieve a visionary goal. The scientific advance should provide a strong and broad basis for future technological innovation and economic exploitation in a variety of areas, as well as novel benefits for society. To prepare the launch of the FET Flagships, 6 preparatory actions (Pilots) were funded over a duration of 12 months starting from May 2011. By the end of 2012, beginning of 2013 two of the Pilots were chosen and launched as full FET Flagship Initiatives in 2013: Human Brain Project and Graphene.

|  |  |
| --- | --- |
| **Flagship pilot** | **Status and plans in EGI** |
| The Human Brain Project | Two initial meetings have been held with the representatives of EPFL. Two technical use cases have been identified. Technical specifications for these use cases are unders preparation by EGI.eu UCST. Service providers for the use cases are required. |
| Graphene | An open session on Computational Nanoscience is organised by the Slovakian NGI at the EGI Conference 2015. The session will bring together members of the nanoscience community interested in large-scale computational simulations. Some of them are also members of Graphene and can help EGI in establishing contacts and discussing collaborations with Graphene. |

### Action plan to engage with structured, international communities

#### Supporting communities that are already in the pipeline

This table includes those international communities that are currently in the Scoping or Implementation phase of the Engagement workflow[[10]](#footnote-10) and that need further support to become active and self-sufficient users of EGI services.

|  |  |
| --- | --- |
| KM3NeT Research Infrastructure | This RI community is currently in the process of establishing a network of experts interested in e-infrastructures, and collecting initial requirements from them. The idea of a joint KM3NeT – EGI workshop was discussed in 2014, but had to be delayed. Depending on the readiness of KM3NeT, and priorities in EGI, the same idea can be revisited in 2015. |
| eLTER (biodiversity) | eLTER has no ICT infrastructure and is looking at using an external IaaS. eLTER’s current problem is about data integration rather than computing. The topic of collaboration with EGI was discussed internally at the eLTER kickoff meeting in May. EGI is currently waiting for the outcome of this discussion to be able to proceed. |
| PhenoMeNal H2020 project: A comprehensive and standardised e-infrastructure for analysing medical metabolic phenotype data | The project is interested in using the EGI Federated Cloud. Initial requirements have been collected and will be discussed during a face-to-face meeting at the EGI Conference 2015. |
| DRIHM hydro-meteorology community | DRIHM team completed the integration of various hydrological models with EGI grid and cloud platforms into its community science gateway. The long-term operation of these models on EGI requires commitments from the respective Resource Providers. This can be arranged with the setup of an SLA between EGI and the DRIHM community. The setup of an SLA has recently started and will continue in the next period. |
| VERCE VRE for data-intensive seismology | Resources, a VRE portal and applications on DCIs have been established in VERCE with EGI's support. Next step is to discuss the long-term needs for resources with VERCE and long-term commitments of EGI Resource providers. |

#### Engaging with new H2020 projects

The H2020 provides structure and focus for several research communities through new EC co-funded projects. The EGI Engagement board must pro-actively monitor the landscape of newly started H2020 projects and identify those that would be suitable partners for EGI in serving the ERA. Collaborations must be arranged with these projects through MoSs. The European Commission CORDIS website can be used for the investigations. Projects that have been recently identified, contacted and are open for collaboration with EGI are summarised in the below table.

|  |  |
| --- | --- |
| Project | Suggested areas of collaboration with EGI |
| ENTICE: Decentralised repositories for transparent and efficient Virtual Machine operations | 1. Using the EGI Federated Cloud as a platform for developing and testing ENTICE innovations from the areas of VM image creation, distribution and optimised deployment. 2. Evaluating the ENTICE innovations in the context of the EGI Federated Cloud production infrastructure and possibly adopting these for use cases supported in EGI. 3. Joint training and user support activities with focus on federated IaaS cloud technologies. |
| NESUS: The Future Of Ultrascale Computing Under Study | 1. Knowledge exchange on sustainability considerations for next generation ultrascale, distributed computing systems. 2. Join research in focused areas for ultrascale, distributed computing systems. |
| CORBEL: Coordinated Research Infrastructures Building Enduring Life-Science Services | CORBEL is the cluster project of biomedical sciences research infrastructures in H2020. It is expected to start later during 2015 and should include an e-infrastructure board with an EGI representative, delegated by EGI.eu. (Similar structure than BioMedBridges) |
| ENVRI PLUS | ENVRI PLUS is the cluster project of environmental sciences research infrastructures in H2020. EGI.eu is member of the consortium and will contribute to the development and delivery of training and support activities targeting RIs. |

### Action plan for improved support for the long-tail of science (Long-tail project members to check)

Improved support for the long-tail of science is implemented through improved support for the NGIs. This is achieved by a focussed project that develops and integrates a technical platform, the ‘EGI Platform for the Long-tail of science’. The following milestones have been reached recently by the project:

* The User Registration Portal was implemented and integrated with EGI SSO identity provider (CYFRONET).
* Support for user-specific proxies has been added to the CREAM middleware, and OpenNebula and OpenStack cloud management frameworks (INFN, CESNET, CSIC).
* The user-specific proxy generation service was developed. This is available to be used by science gateways joining the platform. (INFN, NIKHEF)

The following actions need to be completed during the next period for full implementation and adoption of the platform within volunteering NGIs and within interested scientific communities:

* Setup the European virtual organisation for the long tail, integrating voluntary grid and cloud computing resources offered by the NGIs. Formalise commitments with lightweight OLAs.
* Roll-out of the new releases of the updated grid and cloud middleware services to sites that participate in the long-tail VO.
* Integrate interested science gateways with the User Registration Portal and with the user-specific proxy generator service, then connect them to the long-tail VO. The first two gateways that expressed interest in joining the platform are
  + Catania Science Gateway Framework (INFN, Italy)
  + WS-PGRADE (SZTAKI, Hungary)
* Investigate the status of identity and attribute release from EduGAIN IdPs, decide about, and implement EduGAIN integration with the User Registration Portal and with the science gateways. (To enable user login with EduGAIN IDs besides EGI SSO IDs.)
* Perform integrated tests on the setup then begin promotion campaign of the platform to the NGIs and to scientific communities who operate science gateway-based access points for their users. Engage with interested NGIs and scientific communities and train their local user support teams on the usage of the platform for the support of long-tail scientists.

### Action plan to engage with SMEs and industry (Sergio to update)

* The EGI Business Engagement Programme was discussed by the EGI Council on the 12th of February. Council members answered the following questions:
  + Is the programme fit for purpose in terms of aim and scope?
  + Are the benefits and opportunities offered by EGI exemplary?
  + Does the three-tier structure offer the right range of options for enterprises and SMEs?
  + Does the draft of implementation plan appropriately match resources and required activities?

Based on the answers the community will start implementing the strategy based on the implementation plan included in the strategy document itself.

* Actions:
  + Develop Cloud SaaS business use cases for CAE software
  + Provide big data value access of commercial relevance for integrated cloud and data offering
  + Concept definition of the EGI Marketplace

## Other action plans

### Action plan for Virtual Team projects (VT leaders to complete)

|  |  |
| --- | --- |
| Promoting Desktop Grids | VT will be closed in Lisbon, so no need to include here? |
| Support for genome analysis and protein folding | VT will be closed in Lisbon, so no need to include here? |
| Integrating life science reference datasets within the European Grid Infrastructure | To fill based on report during EGI Conference |
| Scalable access to Federated Data | To fill based on report during EGI Conference |

### Contributing to scientific events (Sara and Champs to complete)

The below table summarises those events that will be organised during the next period outside of EGI, offering good opportunities for EGI members to meet and engage with priority RIs and scientific communities, with members form the long tail of science and industry. The table provides information on the value of EGI contribution/presence at these events, as well as who is responsible within EGI for following-up the activity.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Event | Date and venue | Suggested Contribution AND Action Owner | Value of attending and possibly contributing to the event | Decision (participate? Who?) |
| ELIXIR Data Carpentry workshop | June 22-25, 2015, Utrecht, NL | The event will include a two-day hackathon to develop and improve teaching materials for computational methods in life sciences. EGI representatives could contribute with the development of a module that’s focussed on performing computational methods on EGI e-infrastructures. | Success EGI contribution could reach large number of scientists who work with computational methods in life sciences and could contribute to building a sustainable user base for e-infrastructures from life sciences. | ? |
| Software Carpentry workshop | 15-17. July, SAP Offices in Feltham, UK | Accepted training Tutorial on the EGI Federated Cloud. To be delivered by Diego (INFN-EGI.eu) and Gergely (SZTAKI-EGI.eu). | Reaching SW developers various science disciplines and promote the EGI Federated Cloud to them.  Pilot repeatable course on EGI Federated Cloud. | YES, EGI.eu |
| HPCS Conference | 20-24. July, Amsterdam, NL | Accepted training Tutorial on the EGI Federated Cloud. To be delivered by Enol (CSIC-EGI.eu) and Yin (EGI.eu). | Reaching researchers from HPC, HTC, cloud and big data domain and promote EGI Federated Cloud to them.  Pilot repeatable course on EGI Federated Cloud. | YES |
| BioSHaRE workshop on latest tools and services on data sharing in biobanking | 28 July, Milan, Italy | Programme is already defined. EGI representatives from BBMRI and data sharing topics to consider attending. | Hear about initiatives in data sharing, access and federations from the biobanking domain. Opportunities to find groups and projects that could be linked to EGI FedCloud, Data federations, life sciences and Data accounting activities. | ? |
| EISCAT Symposium | Sept 14-18, South Africa | Workshop or discussion session ‘Towards an EISCAT\_3D DMP and portal’ (Ingemar) | Liaise with the RI community NeIC project to capture details on the requirements of the EISCAT\_3D data and metadata portal. | CC?  EGI.eu? |
| National e-infrastructure for science and its role within the research infrastructure roadmap (Romania) | Sept 10-11, 2015. | Alexandru Nicolin (NGI International Liaison of Romania) | Support the NGI institutes in engaging with national user communities in order to build a stronger and more sustainable NGI. | YES,  NGI RO  EGI.eu? |
| Final BioMedBridges Symposium: Open bridges for life science data | 17-18 Nov, EBI, Hinxton, UK | An e-infrastructure workshop with the interested CCs, and with EUDAT? (Gergely, SZTAKI-EGI.eu) | Expose recent e-infrastructure achievements from life science to the biomedical RIs and build joint workplans with them. | EGI.eu?  CCs? |
| OTHER EVENTS TO ADD |  |  |  |  |

1. ESFRI roadmap: <http://ec.europa.eu/research/infrastructures/index_en.cfm?pg=esfri-roadmap> [↑](#footnote-ref-1)
2. FET Flagship Initiatives: <http://cordis.europa.eu/fp7/ict/programme/fet/flagship/> [↑](#footnote-ref-2)
3. Open Science Commons strategy: <http://opensciencecommons.org> [↑](#footnote-ref-3)
4. EGI Business Engagement Programme: <https://documents.egi.eu/document/2339> [↑](#footnote-ref-4)
5. The technical details of tracking support cases and handing them between the phases and teams, using the EGI RT system are described in <https://documents.egi.eu/document/2478>. The current list of cases can be seen on this ticket dashboard: <http://go.egi.eu/technicalsupportcases>. [↑](#footnote-ref-5)
6. This implementation plan is captured in the most appropriate form that satisfies the parties. E.g. as a Memorandum of Understanding; as a Virtual Team project; as a H2020 initiative; as an agreed PPT slideset, etc. [↑](#footnote-ref-6)
7. Towards the ESFRI Roadmap 2016: <http://ec.europa.eu/research/infrastructures/index_en.cfm?pg=esfri> [↑](#footnote-ref-7)
8. Conclusions on the implementation of the roadmap for the European Strategy Forum on Research Infrastructures <http://www.consilium.europa.eu/uedocs/cms_data/docs/pressdata/en/intm/142794.pdf> [↑](#footnote-ref-8)
9. Staff members of the Data Management and Software Centre division of ESS: <http://europeanspallationsource.se/data-management-and-software-centre> [↑](#footnote-ref-9)
10. Such cases are captured as tickets in the ‘technical-support-cases’ RT queue. The tickets can be publicly browsed at <http://go.egi.eu/technicalsupportcases>. [↑](#footnote-ref-10)