EGI Engagement Strategy

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**Abstract**

This document describes the Engagement Strategy of the European Grid Infrastructure (EGI) community. Engagement helps EGI reach scientific communities and support them in tackling scientific challenges using the reliable and innovative ICT services that are federated into EGI. Successful engagement results in long term partnership between scientific communities and the National Grid Infrastructures (NGIs), ultimately helping them and EGI become sustainable. The Engagement Strategy describes the goals and targets of EGI engagement activities, details the various tasks that Engagement covers, and provides information about the human networks and online resources and tools that help us implement engagement activities. Short term targets and metrics that facilitate strategy execution are also covered in this document.

The EGI Engagement Strategy is updated every three months through the ‘EGI Engagement Advisory Board’. Feedback can be sent directly to Gergely Sipos (Technical Outreach Manager, EGI.eu): [gergely.sipos@egi.eu](mailto:gergely.sipos@egi.eu).

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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-InSPIRE NA2 activity 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. Further information is available at http://go.egi.eu/EngagementAdvisoryBoard[[1]](#footnote-1).

**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.

The ‘European Grid Infrastructure’ collaboration (EGI) operates one of the largest, collaborative e-infrastructures of the world. EGI supports the digital European Research Area (ERA) through its pan-European infrastructure, based on an open federation of 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 grids and clouds.

In this respect sustainability is an essential consideration for e-Infrastructures and scientific communities that they 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 across the whole European Research Area (ERA) with the reliable and innovative ICT services from EGI that they need to undertake their collaborative world-class and world-inclusive research. Engagement is a key element of this EGI strategy with the following goals:

1. Identify scientific communities from the ERA that could break current scientific barriers with the use of EGI/NGI solutions.
2. Reach out to and carry out discussions with these communities about ICT technologies to capture details of their e-infrastructure use cases and requirements.
3. Help the communities address their scientific challenges with existing EGI solutions, and by bringing in new solutions to EGI as required.
4. Support scientific communities during the whole process they have to go through to become active, and self‑sufficient users of EGI e-infrastructure services.

# Target groups

EGI’s 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[[2]](#footnote-2) and from national roadmaps are expected to reach implementation or operational stage. These RIs are already exploring the current and future 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 **ESFRI RIs, their preparatory projects, and other similarly large, multinational and structured scientific collaborations** are considered as the primary potential beneficiaries of EGI services and therefore the prime targets of EGI Engagement activities. These projects and communities come with some advantages, and disadvantages, which need to be considered when engaging with them.

Advantages:

* Usually one point of contact, for example a technical coordinator exists.
* Requirement gathering should be simpler and can build on the established network of contacts of the RIs.
* Acceptance and integration of EGI into the ESFRI plans 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 could be difficult.
* Sometimes need to work with existing/previously chosen tools.
* The full pay off (i.e. scientific breakthrough enabled by EGI solutions) may not be seen for a number of years.

A second target group for EGI Engagement is the large number of **highly dynamic, small research collaborations and research networks**. Unlike RIs, 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. They come with different unique advantages and disadvantages that need to be recognised 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:

* The group is not visible, have no clearly identifiable contacts for engagement.
* 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.
* Might be lacking in technical expertise.
* Learning new tools and methods can be expensive because of the large size of the group.

# The Process

To reach its goals, EGI Engagement has to integrate specific members and online tools from the EGI community. This is achieved by a process that aligns the relevant elements into a single workflow that helps EGI reach new users, then support them in reaching scientific results by through the use of EGI services. This workflow is depicted in Figure 1 and it consists of three phases:

1. **Outreach**: This phase aims to identify those members of the ERA whose work could be lifted to the next level by EGI’s e-infrastructure services. First contact is made with them so they gain a basic understanding of the solutions that EGI provides and how these solutions could benefit specific scientific collaborations and applications. Using communication and marketing approaches this phase raises awareness of EGI within the ERA, and generates interest towards the EGI services within scientific communities. While some of these communities (or individuals from these communities) can immediately become active EGI users by following the manuals and tutorials that exists on EGI/NGI websites, complex and new ways of e-infrastructure usage typically requires expert assistance. Moreover changes and further development of EGI’s solutions to be able to support the use cases of new communities may also be required. These complex cases have to be handed over to, and followed in the second phase of the workflow.
2. **Scoping**: In this phase engagement with new users is deepened, and detailed requirements from their e-infrastructure use cases are captured and translated into focussed support project plans. The projects are formalised in collaboration with the prospective users and aim at e-infrastructure setups that can help these users solve their scientific problems with EGI’s solutions. The projects are formalised as ‘Virtual Team projects’ assembling a team of experts with specific skills to carry out specific tasks for the new community within a 3-6 month timeframe. The primary output of this phase is project plans endorsed by both the EGI community and by the prospective user community. The plans are handed over to the third phase of Engagement.
3. **Implementation:** This phase initiates, then executes the Virtual Team projects according to the endorsed plans. The projects, after successful completion, must enable the user(s) reaching new frontiers in science, and indirectly result in an increased and/or diversified use of EGI’s solutions. During execution the projects are monitored by EGI.eu to ensure timely delivery.



Figure 1. 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 scientific communities. These experts and their involvement in the Outreach phase are the following:

* EGI.eu staff:
  + Neasan O’Neill, Communications Manager at EGI.eu is the coordinator and owner of this phase ([neasan.oneill@egi.eu](mailto:neasan.oneill@egi.eu)).
  + 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 user 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 events.
* NGIs (NILs, DCC, 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 user communities for EGI and NGI from the ERA, but primarily in your country, and promote EGI/NGI services 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 scientific achievements made available 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.
  + Help EGI identify and collect (the references) of scientific publications that received support from the NGIs (resources, services).
* Members of scientific communities (Champions, UCB, projects with EGI MoU):
  + 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 that acknowledge EGI/NGIs for the resources and services that enabled scientific achievements.
  + 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 community engagement.
  + Provide technical support teams to deal with community-specific issues when using NGI/EGI services.

## Scoping

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

* EGI.eu staff:
  + Nuno Ferreira, User Community Support Officer at EGI.eu is the coordinator and owner of this phase ([nuno.ferreira@egi.eu](mailto:nuno.ferreira@egi.eu)).
  + Provide guidance and templates for project formalisation (project initiation document, wiki website)
  + Invite technology experts from EGI and the broader e-infrastructure community to participate in the requirement collection, analysis and solution identification process (from the DCC, NGIs, partner projects, etc. as required)
  + Get approval and support for the project from EGI, and from scientific communities.
* Distributed Competence Centre members (DCC), NILs, projects with EGI MoU:
  + Capture and analyse the technical challenges and requirements of the scientific community
  + Identify solutions by which the requirements can be addressed
  + Contribute to project initiation document
* Members of the scientific community:
  + Capture and provide technical requirements to EGI, and participate in their analysis with the technical experts
  + Propose solutions by which the requirements can be addressed
  + Contribute to project initiation document
  + Approve project initiation document

## Implementation

During the implementation phase the Virtual Team (VT) 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 VT projects require a relatively small number of members. These members (the type of experts), their commitment level (e.g. hours/week), and expected contributions should be defined as much as possible in the project initiation documents. The responsibilities of project members are:

* EGI.eu staff:
  + Gergely Sipos, Technical Outreach Manager at EGI.eu ([gergely.sipos@egi.eu](mailto:gergely.sipos@egi.eu)) is the owner and coordinator of this phase. He monitors the projects, and if necessary initiates corrective actions (e.g. change to project plan).
  + Nuno Ferreira, User Community Support Officer at EGI.eu ([nuno.ferreira@egi.eu](mailto:nuno.ferreira@egi.eu)) helps projects to start (membership, website, email lists, etc).
  + Contribute to project as required according to the project initiation document.
  + Disseminate project results.
* NGIs (NILs, DCC, council), projects with EGI MoU:
  + Contribute to project as required according to the project initiation document.
  + Disseminate project results.
* Members of the scientific community:
  + Contribute to project as required according to the project initiation document.
  + Disseminate project results.

# Tools

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>
* How to capture scientific leads with who scoping should follow up:
  + Report back during the regular NIL, Champion, UCB teleconference meetings
  + Email contacts to [ucst@egi.eu](mailto:ucst@egi.eu)
* Regular meetings for NILs and Champions; for the UCB, for the DCC:
  + Agenda pages of NIL meetings: <https://indico.egi.eu/indico/categoryDisplay.py?categId=36>
  + Agenda pages of Champion meetings: <https://indico.egi.eu/indico/categoryDisplay.py?categId=85>
  + Agenda pages of UCB meetings: <https://indico.egi.eu/indico/categoryDisplay.py?categId=21>
  + Agenda pages of DCC meetings: <https://indico.egi.eu/indico/categoryDisplay.py?categId=120>
* 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)
  + DCC: [dcc@mailman.egi.eu](mailto:dcc@mailman.egi.eu)
* NIL contact table: <http://www.egi.eu/community/ngis/NILs.html>
* DCC contact table: <http://go.egi.eu/dcc>
* NGI collaborations tables: These tables provide up-to-date information on active collaborations that NGIs have with ESFRI RIs, and with other scientific groups/collaborations. The tables are results of Outreach activity that took place in the NGIs until now, and therefore are important input for the Scoping phase. The tables help us keep focused on RIs/communities that have connections to multiple NGIs, and are therefore prime candidates to a European-level support activity, i.e. a Virtual Team project. The two tables are updated on a regular basis using input from the NILs, the Council and other members of the EGI community.
  + NGI-ESFRI collaborations table: <https://documents.egi.eu/document/2073>[[3]](#footnote-3)
  + NGI-community collaborations table: <https://documents.egi.eu/document/2074>3
* 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. The EGI-InSPIRE project has established a process and a database to collect, capture, process, and resolve user requirements and recommendations. Requirements and recommendations from users must be captured in the ‘RT system’, and are followed up by technical experts in EGI, and externally through the Technology Coordination Board. Details are described on this page:
  + <https://wiki.egi.eu/wiki/Requirements_Tracking>
* List of Virtual Teams (both active, and inactive): <https://wiki.egi.eu/wiki/Virtual_Team_Projects>
* Templates for Virtual Team projects:
  + 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

This section provides specific, measurable targets that the three phases of the Engagement activity aims to reach during the next January-April period.

## Cross-cutting

Goal 1: New ‘user-focussed’ EGI web portal.

Goal 2: Define a method by which the following metrics will be measured in future version of the Engagement strategy: Increased access to EGI with robot and short-lived certificates.

Goal 3: Define tools and processes by which scientific publications that received support (resources/services) from NGIs can be collected. Identify limitations in current publication collection tools and processes, and suggest improvements to these, together with an implementation plan.

Goal 4: Identify additional targets for the Outreach process (for example reaching universities with new gateway installations), and the resources reaching them would require from EGI and the NGIs. Prepare an implementation plan and include it in the next version of this strategy.

## Outreach

Goal 1: Create a full portfolio of materials around the 5 EGI Solutions including brochures, posters and content for use in presentations.

Goal 2: Re-scope the 5 solutions as text that can be “plugged into” non-EGI lead H2020 proposals.

Goal 3: Run two webinars based on the services and solutions EGI provides and put a recording of each online as reference material.

Goal 4: Prepare two webinars based on the services and solutions EGI provides for May and June 2014.

Goal 5: Book, prepare materials for the European Geological Union General Assembly in Vienna.

Goal 6: Book and prepare materials for EGI presence at the European Conference on Computational Biology (ECCB), the 18th European Bioenergetics Conference and the Federation of European Biochemical Societies.

Goal 7: Prepare a requirements capturing form to support the collection of requirements during face-to-face interviews. (Similar to HelixNebula Requirements Form)

Goal 8: The LSGC to prepare for the organisation of the 'Workshop on Clusters, Clouds and Grids for Health[[4]](#footnote-4) to be held in conjunction with CCGrid in Chicago on May 26, 2014.

## Scoping

During the next period the Scoping activity will focus on technical engagement with the ESFRI RIs and other large scientific communities that are known to be already connected to some of the NGIs. The NGI-ESFRI and NGI-community collaboration tables provide information about this. (See Appendix A and B). The ESFRI RIs, and communities ones with the highest and with the second highest number of links to EGI are highlighted with RED and YELLOW respectively in these tables. Goals to reach by the Scoping activity during the next period are:

Goal 1: By the middle of February kick-off the project scoping activity for the ESFRI RIs and the scientific communities that have the highest number of active collaborations with EGI. (These are RED in the table). This will be implemented in the form of a series of teleconference calls, initiated by EGI.eu and carried out with the involvement of the representatives of all those EGI members that have active collaborations with these RIs, communities. The NILs must collect and feed information about the status of current engagement into these calls.

Goal 2: By the end of February kick-off the project scoping activity for the ESFRI RIs and the scientific communities that have the second highest number of active collaborations with EGI. (These are YELLOW in the table). This will be implemented in the form of a series of teleconference calls, initiated by EGI.eu and carried out with the involvement of the representatives of all those EGI members that have active collaborations with these RIs, communities. The NILs must collect and feed information about the status of their engagement into these calls.

Goal 3: Define at least 4 new Virtual Team projects as a result of the scoping activity mentioned under Goal 1 and 2, and hand these over to Implementation.

Goal 4: Define at least one focused project as the follow up of the DIRAC meetings that have been conducted during December and January. Hand the project over to Implementation.

## Implementation

Goal 1: Formally close the ‘CTA design study’ Virtual Team and kick-off the science gateway implementation activity that has been agreed within the project.

Goal 2: Formally close the ‘EGI-ELIXIR collaboration’ Virtual Team and agree on follow-up actions with the representatives of ELIXIR.

Goal 3: Finish and formally close the ‘Towards a Chemistry, Molecular & Materials Science and Technology Virtual Research Community’ Virtual Team project. Setup an action plan for the VRC implementation. Particularly: a) developing a portal using WS-PGRADE technologies, b) Establish links with similar communities in the US and East Asia Pacific c) investigate the possibility of a Horizon2020 project that could support the VRC.

Goal 4: Finish and formally close the ‘Promoting Desktop Grids’ Virtual Team project.

Goal 5: Continue the ‘ENVRI study case with EISCAT-3D’, the ‘EGI-DRIHM collaboration’ projects according to their workplans.

Goal 6: Obtain an update on the status of the setups in the EGI-EUDAT-PRACE pilots and close these, or define specific goals for the next 3-6 months. Experiment with the CMMST community: a) an operational link with XSEDE, b) negotiate with PRACE a community grant managed with the GriF/WS-PGRADE tool.

Goal 7: Kick-off the new Virtual Team projects defined by Scoping during the period.

# Metrics

The table below provides an overview of the metrics that are used to monitor the execution of the Engagement strategy. These are defined and captured with a three month frequency and included in future versions of this document.

|  |  |  |  |
| --- | --- | --- | --- |
| Phase  (where relevant) | Metric | Target by end of April 2014  (Jan-April for periodic metrics) | Target by the end of July 2014 (May-July for periodic metrics) |
| Cross-cutting | * Number of entries added to the NGI engagements tables. * Number of new users * Access to EGI with robot and short-lived certificates * Number of scientific publications that received support from NGI/EGI resources/services. | +5 (to each table)  TBD (see goal above)  TBD (see goal above)  TBD (see goal above) |  |
| Engagement | * Number of scientific leads identified by Champions, and handed over for follow up to Scoping. | +3 (no events are expected to be funded by EGI for any champion during the period) | To be defined in the next version. |
| Scoping | * Number of new VTs setup during the period (based on Wiki) | 4 (expected: at least 3 ESFRI VTs, 1 DIRAC VT) |
| Implementation | * Number of VTs competed during the period (based on Wiki) | 5 (CTA, ELIXIR, CMMST, Desktop Grids, EISCAT\_3D) |

# Appendix A – ‘NGI-ESFRI Collaborations’ Table

The table below indicates which NGIs have active collaboration with which ESFRI project. Information for the table has been collected from the NILs, UCB and Council members. Explanation of the colour codes:

* If an NGI has active collaboration (even if at the early discussion level) with an ESFRI, then the respective cell is GREEN in the table.
* The name of ESFRI RIs for which EGI already has/had a Virtual Team project are highlighted with WHITE.
* The name of ESFRI RIs that have the highest number of links to EGI are highlighted with RED.
* The name of ESFRI RIs that have the second highest number of links to EGI are highlighted with YELLOW.

The table helps the EGI community monitor engagements with research infrastructures from the ESFRI roadmap, and define targets for focussed support projects (Virtual Team projects). The table is updated on a regular basis as part of this strategy using input from the NILs, UCB, the Council and other members of the community.



# Appendix B – ‘NGI-community Collaborations’ Table

The table below indicates active collaborations between NGIs and scientific communities that have the potential to evolve further in the future. Information for the table has been collected from the NILs through the ‘Outreach survey’ in Q4 2013. Explanation of the colour codes:

* If an NGI has active collaboration (even if at the early discussion level) with a community, then the respective cell is GREEN in the table. Where further information was provided about the nature/status of the collaboration it is captured in the cells.
* The name of communities that have the highest number of links to EGI are highlighted with RED.
* The name of communities that have the second highest number of links to EGI are highlighted with YELLOW.

The table helps the EGI community monitor engagements with scientific communities, and define targets for focussed support projects (Virtual Team projects). The table is updated on a regular basis as part of this strategy using input from the NILs, UCB, the Council and other members of the community.



1. The EGI Engagement Advisory Board still needs to be established. Proposed members: UCB, External Advisory Board, NILs, Champions, EGI.eu representatives. [↑](#footnote-ref-1)
2. ESFRI roadmap: <http://ec.europa.eu/research/infrastructures/index_en.cfm?pg=esfri-roadmap> [↑](#footnote-ref-2)
3. Visible to NILs, council members and EGI.eu staff. [↑](#footnote-ref-3)
4. <http://lsgc.org/ccgrid-health> [↑](#footnote-ref-4)