EGI Engagement Strategy

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**Abstract**

This document describes the Engagement Strategy of the EGI community. Engagement with scientific communities helps the EGI community become sustainable by connecting and serving researchers from all fields of science across the whole European Research Area with reliable and innovative ICT services provided by EGI. The strategy document describes the goals of EGI Engagement, the different elements it includes, and provides details about the human resources and online tools that are integrated under this activity to reach its goals. Metrics that help EGI measure the execution of the strategy are also provided.

The EGI Engagement Strategy is updated every three month based on feedback from members of the community and of the broader, global e-infrastructure ecosystem. Feedback can be sent to Gergely Sipos (Technical Outreach Manager, EGI.eu): [gergely.sipos@egi.eu](mailto:gergely.sipos@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-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 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 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 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.

Sustainability is an essential consideration for e-Infrastructures and scientific communities that they support. Many of these scientific communities frequently 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. The goals of EGI Engagement are:

1. Identify potential EGI users and user communities from the ERA.
2. Reach out and carry out discussions with them at the ICT technological level to capture their e-infrastructure requirements.
3. Address these e-infrastructure requirements using existing EGI solutions, and by further developing solutions, bringing in new solutions to EGI as required.
4. Support new communities during the process they have to go through to become active, and self‑sufficient users of EGI e-infrastructure services.

# Target groups

The overall aim of EGI is to increase the usage of the infrastructure by researchers to improve their work. In particular areas of research with massive data or computational requirements can benefit greatly from the facilities offered by EGI.

In the next two years a growing number of Research Infrastructures (RIs) from the ESFRI roadmap are expected to reach implementation. ESFRI RI projects are already exploring the current and future needs of their communities and key instruments in bringing together a wide diversity of stakeholders to look for solutions to many of the problems science is facing today. Therefore ESFRI RIs are the primary target of EGI Engagement. These communities come with some advantages, and disadvantages, which need to be addressed when engaging with them.

Advantages:

* Usually one point of contact, a technical coordinator
* Requirement gathering should be simpler
* Acceptance and integration of EGI into the ESFRI plans should lead to big increase in usage
* Already aware of their problems and the benefits of e-infrastructures
* Likely to have some internal expertise that can work with EGI

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 may not be seen for a number of years

A secondary target group for EGI Engagement are individual researchers and small research collaborations. Unlike the ESFRIs they may not be aware of e-infrastructures and their benefits so discussions have to start at a more basic level. They come with other unique advantages and disadvantages that need to be recognised when engaging with them.

Advantages:

* Usually more flexible on using new technologies and tools
* Bring new insights and tools that could have a wider use
* May be the first step in integrating a much wider community

Disadvantages:

* Not as big a pay off from a usage perspective
* May not be aware of their problems and the benefits of e-infrastructures
* Requirement gathering may not be straightforward
* Might be lacking in technical expertise

# The Process

To achieve its goals, EGI Engagement has to integrate various members and different tools from the EGI community. This is achieved by a process that aligns the elements into a single workflow that helps the identification and evolution of new users into active and self-sufficient users of EGI services. The workflow is depicted in Figure 1 and it consists of three phases:

1. **Outreach**: This phase aims to identify potential users for EGI, and make the first contact with them so they gain a basic understanding of the services that EGI currently provides and how these can benefit scientific communities and their applications. With 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 new users can immediately become active EGI users without further guidance following the manuals and tutorials that exists on EGI/NGI websites, complex and new ways of e-infrastructure usage typically requires expert assistance. Furthermore changes and further development of EGI e-infrastructure services to fit the use cases of the new user may be also required. These complex cases have to be handed over to, and followed up by the owner of the second phase of the workflow.
2. **Scoping**: In this phase engagement with new users is deepened, details and requirements from their e-infrastructure use cases are captured and translated into focussed support projects. The projects are formalised in collaboration with the prospective users aiming an e-infrastructure setup that can help the users become active and self-sufficient user of EGI. The projects are typically formalised as ‘Virtual Team projects’ assembling a team of experts with specific skills to carry out specific tasks within a 3-6 month timeframe. The primary output of this phase are 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 result in an increased, diversified use of the EGI e-infrastructure, or should deliver an output that indirectly helps EGI reach such output. The projects are monitored by EGI.eu to ensure timely delivery and to initiate corrective actions should that be necessary.



Figure . EGI Engagement process

## Outreach

This phase uses communication, marketing and proactive outreach techniques to communicate and disseminate the work of the EGI and its user communities within the ERA with the main goal to raise interest for these services. To be effective, this activity has to use both online and offline (face-to-face) mechanisms, and must involve a large number of members who convey messages from EGI into scientific communities. These members and their involvement during the 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 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 the NGI that can attract 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.
  + 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.
* 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.

## Scoping

During this phase engagement with prospective communities is deepened, and formalised in a project initiation document that describes the focused project that can specify, develop and deploy the 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 projects are instantiated and executed following their plans. The projects are monitored by EGI.eu staff to ensure progress and to initiate corrective actions (such as update to project plan) if required. Projects require a relatively small number of members, with their expertise, commitment level (e.g. hours/week), and expected contributions 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 resources and tools exist and support the successful implementation 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 research infrastructures, and with other scientific groups. 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 helps us keep focused on RIs/communities that have connections to multiple NGIs, and are therefore prime candidates to a European-level activity. The two tables are updated regularly based on input from the NILs, the Council and other members of the community during the regular meetings or emails.
  + NGI-ESFRI collaborations table: <https://documents.egi.eu/document/2073>[[2]](#footnote-2)
  + NGI-community collaborations table: <https://documents.egi.eu/document/2074>
* 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 and runs a well-defined process to collect, capture, process, and resolve user requirements and recommendations. Requirements and recommendations from users must be captured in the RT as described on this manual page:
  + <https://wiki.egi.eu/wiki/Requirements_Tracking>
* 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.

## 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, 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: 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.

## 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[[3]](#footnote-3)). 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.

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.

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

The targets for the next period are:

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.

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.

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

Goal 8: 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.

# Metrics

The table below include 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 | Metric | Target by end of April 2014  (Jan-April for periodic metrics) | Target by the end of July 2014 (May-July for periodic metrics) |
| Engagement | M1. Number of scientific leads identified by Champions, and handed over for follow up to Scoping.  M2. Number of entries added to the NGI engagements tables. | +3 (no events are expected to be funded by EGI for any champion during the period)  +5 | To be defined in the next version. |
| Scoping | M3. Number of new VTs setup during the period (based on Wiki) | 4 (expected: at least 3 ESFRI VTs, 1 DIRAC VT) |
| Implementation | M4. Number of VTs competed during the period (based on Wiki)  M5. Number of new users  M6. Increased access to EGI with robot and short-lived certificates | 5 (CTA, ELIXIR, CMMST, Desktop Grids, EISCAT\_3D)  TBD (see Goal 8 above)  TBD (see goal 8 above) |

# 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. Visible to NILs, council members and EGI.eu staff. [↑](#footnote-ref-2)
3. [↑](#footnote-ref-3)