

## EGI Business Engagement Programme

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**Abstract:**

This document outlines the EGI Business Engagement Programme defining how private organisations, with a focus on SMEs, can engage with EGI for joint collaborations. The programme outlines the opportunities and benefits for organisations to work with EGI, and defines varying levels of collaboration. The document also presents an implementation plan to develop all the needed mechanisms for the engagement to happen. This work is a result of a dedicated Virtual Team, including feedback from EGI.eu managers and a number of community representatives. This document is targeted to support the approval of the programme as a whole by EGI Management (EGI.eu Executive Board/EGI Council) in order to start the implementation, promotion and engagement activities.

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<sup>1</sup> [https://wiki.egi.eu/wiki/VT\\_Business\\_Engagement#Members](https://wiki.egi.eu/wiki/VT_Business_Engagement#Members)

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## 1 For EGI Management Approval

The key points within this report that need the endorsement of EGI Management are:

1. Is the programme fit for purpose in terms of aim and scope?
2. Are the benefits and opportunities offered by EGI exemplary?
3. Does the three-tier structure offer the right range of options for enterprises and SMEs?
4. Does the draft of implementation plan appropriately match resources and required activities?

## 2 Background

### 2.1 Motivation

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 in such a way that knowledge transfer is not anymore a nice-to-have, but has become essential for sustainability/survival.

- H2020 programmes include an “impact” section that aims to go beyond the exploitation and dissemination plan at the end of the project, which was the standard of previous projects. From now on, the proposals need to demonstrate that outcomes have a positive impact onto business and society from day 1.

The scientific big (open) data push opens a particularly promising field of opportunities for cooperation and development. A flexible, highly co-operative, and efficient network of many different parties is needed to build sustainable models of exploitation. The roles that every party has to play are very different, and they go beyond the traditional role of firms as users of the research outputs. They are also expected to become active developers, aggregators, enablers and/or marketers. For example:

- Helping in the productisation/development of the project outcome/result at an early stage by surveying the targeted consumers’ needs and/or by conducting a “Test Drive”-service.
- Supporting the distribution of the project outcome by becoming a channel to address an audience that could otherwise not be reached by the project (geographical, segment, niche).
- Adopting the outcomes of the project such as novel technologies as another input of their supply chain, i.e. a part of their business process (for example a new visualisation methodology)

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.

Strengthening the relationship with the business sector EGI is also fundamental part of the Open Science Commons strategy and a way to show the leadership that has been asked to take.

### 2.2 Barriers and solutions to them

One of the main issues to-date was having no dedicated effort within EGI-InSPIRE 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.

The members of EGI 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.

- [Example] Loss of momentum from EGEE Business Activities.
- [Example] No previous effort in EGI-InSPIRE.
- [Example] The EGI Business Engagement Programme has not yet been launched.

The language spoken by the business sector and their aspirations are different to those in use in the EGI community. There are also difficulties reported even by those NGIs with more experience in business development.

- [Example] SURFsara (NL) has reported difficulties in assessing the application of the fair competition rule in some cases and the national norms for publicly funded activities.
- [Example] CSC (FI) reported problems in selling services because insufficient productisation, and managing time-to-results expectations.

Besides, another barrier is posed by the strategic goals and organisational structures of some EGI members, whose mandate does not consider involvement with companies, or have a very limited framework for the relationship.

- [Example] France Grilles has to deal with the national policy for relating with private sector, Italian NGI and RCs have limitations to offer infrastructure services to companies.

Most of the current NGIs/Resource Centres activity is done at a local level, but this remains unknown for the rest of the EGI community except for a few reported cases. There is thus poor European coordination for managing these experiences, which is also seen in the lack of formal structures for addressing the request for cross-border access.

- [Example] Lack of a Business Engagement Programme giving a formal structure and effort to coordinate activities.
- [Example] So far, requests for cross-border access are solved ad-hoc by EGI.eu outreach team. For instance, an SME identifies the most suitable platform in another country, but that country's access policies prevent the use of resources by a foreign company.

There is also deficiency in liaising with European and national/local structures with a goal in business engagement i.e. Innovation Clusters, European and national/regional SME instruments (e.g. Horizon's 2020 SME Instrument, COSME, Enterprise Europe Network), European projects with a goal in data and computing (e.g. CloudSME, Fortissimo) entrepreneurs and business organisations (such as PIN-SME).

### **Overcoming barriers and engaging industry for common benefits**

EGI needs for a specific structure (not necessarily a legal structure) for business engagement with dedicated effort, dedicated personnel knowledgeable in business activities, and established procedures, working at local level and with European co-ordination.

- [Example] EGI.eu Strategy and Policy Team has experience in working with industry from previous projects
- [Example] Selected NGIs with proven business use cases i.e. IFCA, SURFsara
- [Example] SMEs already working with EGI i.e. 100%IT, SixSq, new business partners coming through Business Engagement VT and EGI-Engage e.g. Engineering, Gnubila, Agro-Know...

### 3 EGI Business Engagement Programme

This section defines the Business Engagement Programme and can be used as content for promotion (e.g. dedicated webpages on the EGI website, print material).

#### 3.1 Purpose and Scope

The European Commission has made engaging SMEs one of the priorities of their policy with the aim of putting SMEs in the lead for the delivery of innovation to the market. EGI aims at supporting this policy objective by exploring opportunities for synergies with SMEs as well as connecting to other SME-focussed initiatives within Horizon 2020. This will allow EGI to establish collaborations for creating mutual value, and for conducting research and development and innovation activities with the private sector.

The commercial exploitation of the final outputs/results of the development project by the participating companies is encouraged. However, for the EGI community, the main purpose of this programme is to support and drive innovation and knowledge exchange while recovering costs.

#### 3.2 Programme Definition

The EGI Business Engagement Programme is a framework underlying the specific future joint activities between EGI members and the different representatives of the business sector.

The EGI community represents a broad range of organisations with different governance, priorities and interests including different policies for commercial use. EGI will work with programme participants to agree on joint work with appropriate community members.

The creation of this Business Engagement Programme should guarantee the right of every EGI member to engage on a particular project developed under the aegis of this programme. Depending on the degree of involvement the agreement will be more generic or will be defined on a case-by-case basis. Joint activities requiring a deeper level of commitment will be submitted to a more thorough process of acceptance. The formalisation of agreements involving EGI as a federation will still be presented for approval to the relevant EGI body.

#### 3.3 Objectives and Beneficiaries

The EGI Business Engagement Programme provides an opportunity for both commercial and non-profit organisations to engage with the world's largest e-Infrastructure supporting European and global scientific and research collaborations to accelerate the adoption of the scientific outputs into society, to support innovation and knowledge transfer into the market.

EGI is open to engagement with a broad range of public and private companies of all sizes and sectors, and will develop specific offerings for different types and collaboration activities.

#### 3.4 Potential areas of Collaboration

Participants can benefit in multiple ways ranging from promotion, market intelligence, and networking through to access to dedicated consultancy and support, to exploit EGI services for pre-commercial R&D and test proof of concepts. The opportunities for developing added-value services for reusing open research data sets will be particularly encouraged. The following are examples of possible collaboration types:

Area	Opportunity	Example
<b>Computing Capacity</b>	Obtain computing capacity to test workflows, models, and applications that will be part of a future advanced ICT product or service.	SME gets computing access grant to test their in-development software on a large-scale infrastructure. Receive support for porting applications from EGI.
	Supply computing or storage resources on demand for EGI user communities complementing EGI resources.	Commercial provider technically integrates with the infrastructure and offers computer and storage capacity to user communities on a paid basis
<b>Software products</b>	Access to EGI software products, virtual appliances, and documentation.	Company accesses AppDB to find open source software products, applications in different scientific domains, and related documentation and training material.
<b>Expertise &amp; knowledge sharing</b>	Access to a highly specialised community of experts on distributed computing systems and all scientific domains.	EGI provides expertise, experience, consultancy and tools to assist a provider in designing and engineering a computing cluster and connecting it to the EGI distributed infrastructure.
	Opportunity to collaborate with EGI to deploy technological solutions for the EGI infrastructure.	SMEs can join development groups to create new technological products that can later be qualified as part of the EGI service portfolio.
<b>Big (open) data</b>	Access to the increasing amount of research data sets connected to EGI resources to assist in building your own added-value services.	A life sciences enterprise accesses EGI-connected datasets to test a protein folding algorithm then offers the new algorithm as SaaS over the EGI infrastructure.
<b>Market intelligence &amp; promotion</b>	Opportunity to interact with research communities, data centres and other members of the EGI ecosystem to gather information relevant to the company for market and product development.	Participating in EGI events and teams provides direct contact with resource providers, software developers and user communities. This helps companies produce efficient and desirable new products and services.
	Promotion and recognition of the company brand, product, and services within the EGI ecosystem.	Programme membership provides European and global visibility to the participant brand and products in the EGI community and beyond. This also establishes possibility for sponsorships and organisation of common events.

## 3.5 Benefits

### 3.5.1 For Programme Participants

The number and degree of the benefits will depend on the formula and level of involvement. Any benefit is naturally aligned with the current European policies for supporting SMEs and large commercial organisations and will naturally respect fair competition rules or any other applicable laws. By joining the participant can obtain one or several of the following benefits:

- 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.

### 3.5.2 For EGI Community

The Business Engagement Programme aligns with the current European policies to support SMEs and business development in general. In this sense, establishing more, wider, and tighter relationships with the private sector, and SMEs in particular, and other actors bring not only benefits to the EGI members, but also is a must, and a good base for ensuring the approval of future funded projects and ensuring the sustainability of the outputs after project life.

Value demonstration	Infrastructure
<ul style="list-style-type: none"> <li>• <b>Increase visibility of EGI services</b> in forums beyond the scientific community such as the private sector, media, public and business forums and in society as a whole.</li> <li>• <b>Demonstrate the value of the EGI services as creator of innovation and knowledge</b> that is transferred to society through a tight relationship with the business sector.</li> <li>• Support, develop and <b>become a visible actor in the Big Data Value Chain</b> with the private sector</li> <li>• <b>Share skills and expertise</b> on distributed computing infrastructure gathered by the EGI members to other entities (public or private)</li> </ul>	<ul style="list-style-type: none"> <li>• <b>Add complementary IT resources</b> to the infrastructure and increase the capacity and capability of EGI infrastructures.</li> <li>• <b>Improve technical services</b> offered to the research communities arising from co-operation with the different parties.</li> <li>• <b>Increase efficiency of internal operational processes</b> through partnerships. The inclusion of business partners with complementary, even very specialised, expertise can improve the efficiency of internal operations of the EGI members.</li> </ul>
Knowledge	Business
<ul style="list-style-type: none"> <li>• <b>Increase the number and variety of research innovation projects outputs</b> in which EGI members participate.</li> <li>• <b>Add new topics for research and innovation</b> coming from the interaction between the private sector and the scientific communities.</li> <li>• <b>Acquire new knowledge and expertise</b> coming directly from the business sector or gained during the process in which EGI and the Business Participants co-operate.</li> <li>• <b>Boost research publication citations/references</b> made available for the community. This is also a key indicator of the performance of the EGI infrastructure and an important measure of the value provided by EGI to the society.</li> </ul>	<ul style="list-style-type: none"> <li>• <b>Obtain free licenses or discounts</b> on usage of proprietary products/services.</li> <li>• <b>Access new category of users</b> with business potential or societal potential.</li> <li>• <b>Offer a wider range of tailor-made products, services or solutions</b> created specifically for the EGI ecosystem.</li> <li>• <b>Expand the base of business sector partners</b> for designing, applying and funding and implementing research and innovation projects.</li> <li>• <b>Access a wider number of key actors in the exploitation, dissemination and sustainability</b> of technical and scientific results arising from the EGI research and innovation projects. The co-operation with private sector is essential to this.</li> <li>• <b>Lead to potential revenue generation/cost recovery</b> through new customers for pay-for-use services based on proven services, skills and capabilities (if so agreed).</li> </ul>

### 3.6 Approving and formalising business engagement

The EGI Business Engagement Programme is a framework underlying the specific future joint activities between EGI members and the different representatives of the business sector. EGI is open to engagement with a broad range of public and private companies of all sizes and sectors, and will develop specific offerings for different types and collaboration activities.

The EGI community represents a broad range of organisations with different governance, priorities and interests including different policies for commercial use. The creation of this Business Engagement Programme should guarantee the right of every EGI member to engage on a particular project developed under the aegis of this programme. Depending on the degree of involvement the agreement

will be more generic or will be defined on a case-by-case basis. Joint activities requiring a deeper degree of commitment will be submitted to a more thorough process of acceptance.

This proposes 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. The formalisation of agreements involving EGI as a federation still will be presented for approval to the appropriate EGI body.

EGI recognises that many different businesses may want to interact with the EGI community, from small SMEs embedded in highly innovative sectors to R&D units of large enterprises, public bodies, projects, etc. The scope of activities, industry sector or scientific discipline and levels of engagements may also vary in great degree. In order to deal with it, EGI proposes a multi-level engagement programme that offers something for everyone: from simple membership to facilitate discussions and joint promotion, to some form of strategic alliance. The most important issue is deciding what all involved parties want to do together and agree on which mechanisms are the most appropriate:

- **EGI Business Engagement Programme Member**
  - Low commitment starting point, support discussion, exploration of opportunities and joint promotion. Based on lightweight generic cooperation agreement, and NDA if needed or requested.
- **EGI Business Associate**
  - Deeper engagement and memorandum of understanding to support technical interaction and reserved access to EGI services and resources.
- **EGI Business Partner**
  - Longer-term partnership and commitment based on a joint work plan and shared strategic goals.

See Annex 1 for further details regarding each level.

### 3.7 Business Programme Contact details

[businessprogramme@egi.eu](mailto:businessprogramme@egi.eu)

## 4 Activity Plan

### 4.1 Promotion plan

Raising the level of awareness about EGI work and services among European SMEs is a very ambitious objective that will require time and dedicated effort. The way to achieve it is to start with cost-effective actions and reasonably feasible objectives. We propose to create a webpage, either nested in the EGI.eu or standing-alone. A draft of the possible content for this is presented in previous section. The objective is to give a point of reference for every member of EGI. With this step, we create a seed at a smaller scale for learning from each other and testing the most suitable activities and formats for preparing the launch of the programme at a bigger scale. The experience obtained will set the basis for a serious, coherent and well-articulated programme and some success stories.

#### **Actions for promotion**

1. A dedicated webpage describing the EGI aim for engaging with SMEs and other business sector, the possible collaboration models that we can conduct, the mutual benefits and the contact details for further information.
2. Create business email address (i.e. [businessProgramme@egi.eu](mailto:businessProgramme@egi.eu)). EGI community experts will then contact the applicant to discuss the company interest, what EGI can offer, negotiate any joint work



programme and move toward a formal agreement, if applicable. The potential candidate will be requested to give few details in the first contact such as:

- Company details (name, URL)
- Contact name(s) (with position of the applicant(s))
- Area of interest for collaboration and goal

3. Prepare blog post, article for newsletter and text for Director’s Letter

4. Post social media messages

## 4.2 Network of Business Engagement Experts

A fruitful business engagement activity requires resources, of which the human component is surely the most important one. As an initial step, EGI needs to focus on building a network of business experts as a cost-effective launch for gathering with those with the necessary skills and know how. The network would also benefit from the experience that some of the EGI members have already with the business sector. This business network would be composed of NGIs/Resource Centres who have already experience in business development and those willing to develop and feed into existing Competency Centres or those being developed through the EGI outreach team.

Ideally, as activities mature and gain traction, a network of Business Engagement “Centres” could be created to perform more complex analysis, outreach and hands-on activities. Further details have been included in Annex 2.

## 4.3 Funding/Budget

It is understood that great the scope, the higher the effort required and therefore budget. Several areas of funding support have already been identified, which matches much of the initial planned activities. However, in order to expand efforts, new areas of funding opportunities need to be defined. The following sections outline current funding to support the business engagement activities coupled with potential areas for further exploration.

Overall, this programme proposes to start with cost-effective activities that does not require high investment, but focus on areas with greater impact. The activities that have a European and national/local level must be supported with funding accordingly. Some actions have been allocated some effort under the EGI-Engage programme with others can be funded by a mixed pool of revenue streams.

### 4.3.1 Actions covered by EGI-Engage

The EGI-Engage proposal covers a series of activities with SMEs. They are designed to understand the needs and requirements of the SMEs and to define specific models for the creation of synergies around other activities of the project, but also to increase the skills of the participating NGIs (and of EGI in general) to approach SMEs and figure out possible ways to collaborate.

The proposed actions are the identification of promising SMEs in appropriate forums (industrial clusters, scientific community forums, and initiatives related to Open Data, Big Data Value, and other European SME Instruments. EGI-Engage will partially leverage on open data generated in selected fields (i.e. agri-food, fishery and marine, and/or geospatial), and the use EGI resources as enabling systems. Some of produced outcomes are expected to be a good fit for commercial exploitation.

### 4.3.2 EGI Donor club

Even if the concept of the EGI donor club is not an inherit structure of the Business Engagement Programme, it is however a potential funding source, in the form of a donation or bequeath for the common good, to support its activities and an area to promote it. This is perfectly aligned with activities

such as providing services to third parties, like SMEs or non-profit organisations. A giving society structure such as a donor club creates a win-win situation for all the parties involved. Donors or giving societies obtain the right to tax deductions and/or exception, EGI get the funds for conducting activities according to its strategy, and the third parties obtain benefits that ultimately revert into society.

The donor club can have various groups at different giving levels, and offer corresponding benefits to group members. The benefits for the donors can be: access to special events, member-only newsletters, magazines, and reports, recognition in EGI publications annual report, and on the website. For each donor club / giving level, the organisation should offer a range of benefits that serve to both recognise the donor for support as well as to continue cultivating the donor for future gifts.

The EGI Business Engagement Programme can be one of the areas to support the further development of this as part of EGI's sustainability strategy.

#### 4.3.3 H2020 project calls and SME instruments

H2020 objectives support joint collaboration activities with the business sector. There are several SME instruments that also fund activities for supporting the collaboration between scientific infrastructures and SMEs. The provided funding can be distributed for activities at a European and national/local level. Understanding the objectives and mechanisms of the different H2020 calls and other instruments is therefore essential.

SMEs that are EU-based or established in a country associated to Horizon 2020 can now get EU funding and support for innovation projects that will help them grow and expand their activities into other countries – in Europe and beyond. Horizon 2020 funds high-potential innovation through a dedicated SME instrument, which offers seamless business innovation support under the section Societal Challenges and the specific part Leadership in Enabling and Industrial Technologies (LEITs).

Provided with about €3 billion in funding over the period 2014-2020, the SME Instrument helps high-potential SMEs to develop ground-breaking innovative ideas for products, services or processes that are ready to face global market competition. Available to SMEs only, which can however organise a project in the way that best fits their business needs – meaning that subcontracting is not excluded – the new scheme has opened a new highway to innovation through phased, progressive and complimentary support.

There is an opportunity for EGI, who has experience in developing EC projects, as well as to help deliver services, can join with its business partners for joint development projects as a solid funding opportunity.

#### 4.3.4 In-kind

Within EGI, many research partners are willing to provide services to each other as part of research collaborations, with these collaborative exchanges working very well as each party is typically happy with the service being provided and the community as a whole is happy that the relationship between the parties is equal. It is very hard to balance these models when one party either consumes or has to provide more services than the others.

On the commercial side, services are rarely provided free of charge, however, the in-kind model is commonly used for businesses to co-develop or exchange services when the value of the services is defined by the parties involved in the transaction of comparable value or mutual interest on a trust basis. Neither party is “paid”, but receives something that would only have had to be converted to physical currency. Clearly the parties concerned need to identify services that they are willing to exchange and define a way of ensuring the value of the services exchanged are equal – either in a single transaction or over the longer term as part of a series of transactions. Such concerns do not arise in cash based transactions. This is one very interesting component of the EGI pay-for-use activities in needing a

mechanism to demonstrate the “value” of the service, even if no money exchanges hands.

In-kind effort should not be seen as “free”, as there is a cost on both sides, however, each party obtains increased benefits than otherwise on their own. Therefore, the fundamental model of the EGI Business Engagement Programme of mutual benefit exchange is a cost effective means of operation.

#### 4.3.5 National/Local funding

Some NGIs are actively investing activities with the business sector to support the knowledge transfer to the business sector and society. A highly active business centre would require resources for conducting their activities and dedicated personnel.

### 4.4 Business Engagement Programme Timeframe

This table presents a possible timeframe for an implementation plan. It exemplifies a suitable prioritisation of the actions, which are to be executed in the beginning/simultaneously and in which order.

Business Engagement Programme Timeframe																														
Activity \ Month	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24						
<b>Funding</b>																														
Understanding funding mechanisms	█				█										█				█											
Project funding applications	█			█		█										█		█				█								
<b>Promotion</b>																														
Creation Webpage	█		█										█																	
Other promotion and dissemination activities	█			█		█										█														
Participation in external workshops	█			█		█										█														
<b>Business Centre Network</b>																														
Open survey	█		█										█																	
Negotiating/Creation	█			█		█										█														
Internal training	█						█												█											
Mapping relevant contacts assoc/Innovation Clusters	█									█																				
Identification of relevant contacts (European level)	█									█																				
Characterisation growing areas/underserved segments	█									█																				
Identify potential clients	█									█																				
Creation of first successful stories	█									█																				
<b>Events</b>																														
European SME/Business Development workshop (EGI forum)	█			█		█										█														
Workshop/Master class/Event (local level)	█																		█		█									

## Annex 1 – Summary of the three-tier level structure for engagement

This table summarises the three-tier level of relationship between EGI and business sector representatives at both European and local level, more detailed information follows:

	Member	Associate	Partner
Inclusion in marketing material/presentations/website	✓	✓	✓
Access to test bed resources and basic support	✓	✓	✓
Access to open research datasets, tools and apps	✓	✓	✓
NDA (if requested)	✓	✓	✓
Lightweight Cooperation Agreement	✓		
Limited term formal MoU (max 12-month cycles)		✓	
Opportunity to participate in EC-funded projects with EGI and partners.		✓	✓
Specialised consultancy		✓	✓
Presentation and promotion opportunities at EGI events (e.g. reduced sponsorship prices)		✓	✓
Formal allocation of resources and advanced support		✓	✓
Membership to the Business Advisory Board*		✓	✓
Long-term Partnership Agreement (e.g. 2-year) - benefiting from expertise of EGI community			✓
Stronger role in the EGI governance**			✓

\*The Business Advisory Board is a group of business representatives who advise EGI on business needs and opportunities and helps guide the strategic direction of this world-leading e-infrastructure.

\*\* The mechanism needs to be defined

### EGI Business Engagement Programme Member

This initial level allows business of all sizes to engage with EGI, get information about the research community it serves, get exposure to the community through joint promotion and get access to testbed resources, open research datasets, tools and apps. Membership in the engagement programme has a low administrative overhead.

#### Formalisation

The document for formalising the relationship can be a lightweight, standard cooperative agreement, with generic text about the collaboration. It may also include a mutual NDA, if needed. It will include generic formal statements through which the potential participant will declare their adherence to European, relevant national law, and any other EGI policies such as not misusing the resources made available for them.

### EGI Business Associate

The EGI Business Associate programme is for companies who commit to deeper level of interaction with EGI. They are eligible for all benefits listed for the previous level, including using the EGI infrastructure testbed and open research data sets, but may imply more technical engagement. In addition, an EGI Business Associate would benefit from:

- Participating in special EGI meetings and events to network with this European and global research community, opportunities to present at EGI conferences.
- Contact with technical outreach teams and systems experts to develop plans for technical engagement.
- Being eligible for formal allocation of resources.
- Membership on the EGI Business Advisory Board.

#### **Formalisation**

A Memorandum of Understanding (MoU) is best suited to formalise this relationship, because is a formal but light approach with a reasonably low barrier to engagement, which allows the future associates the flexibility they need to focus on work and maximise resources. MoU templates are already available. <https://documents.egi.eu/document/87>

#### **EGI Business Partners**

Business partners are organisations that aim to have a very deep level of commitment with EGI, sharing strategic goals in a long-term commitment. This level would be required when developing the distribution channels of a pay-for-use activity, or exploitation of technological outputs arising from EGI project activity. The last bit is particularly relevant for the development of the (big) Open Data Value activities. Business partners may have previously been Business Associates. EGI Business Partners would also have the opportunity for a stronger role in the EGI governance. The specific mechanism needs to be defined.

#### **Formalisation**

This level requires an agreement specific for each Business Partner and EGI (being it as the whole organisation or any of the EGI member(s)). It may require a Memorandum of Understanding, a contract or even a joint-business venture.

## Annex 2 – Business Engagement Centres

### European Business Engagement Centres

The network of business centres is entitled to receive guidance and support for performing the activities. Leadership and coordination will also be needed to increase the impact and the efficiency of the activities performed at the local level (see following section). There are also activities whose value emerges especially at a coordinated European level (such as liaising with European organisations or contribution to the shaping of European policy).

The activities proposed are:

- Support local business centres to formulate relevant messages towards local industry (guidelines and support).
- Organise internal trainings for acquisition of knowledge of Business Centre's on business issues and on their activity about SMEs instruments, description of business models, coordination, legal and organisational issues, PPPs, fair market, public funding use, etc.
- Coordinate and produce materials for informing funding and political bodies (e.g. EC) about the activity with industry, the exchange experiences and opportunities between industry and the whole EGI at a European level.
- Participate in events and public contributions for defining new instruments and influencing the definition of related policies.
  - Participate in external forums with a goal in connecting industry and business sector and organised by other players.
    - *Objective:* raising the awareness about EGI activity and the opportunities to engage, gathering user requirements, networking.
  - Liaise with similar programmes/activities in other pan-European infrastructures (e.g. GEANT, PRACE, EUDAT).
    - *Objective:* Exchange of information, development of common activities, lobbying for purposeful funding instruments.
  - Study and liaise with European SME instruments<sup>2</sup>.
  - And European Business Associations e.g. PIN-SME, IraSME, Enterprise Europe Network.
  - Lead the Business Engagement Programme, set best practices.
  - Organisation of events (free for SMEs) of interest for both academic and business sector, which can be co-located with EGI community forums.
    - Reaching businesses and demonstrating the value of distributed computing.
    - Opportunity to exchange knowledge and gain experience in the use of technologies (tools, APIs).
    - Addressing new challenges: Scientific Big (Open) Data with activities such as datathons, hackathons.
    - Workshops, master class, and information meetings on distributing computing at various own or external events.
  - Formats to be considered, other organisations.
    - Study Groups with Industry (<http://miis.maths.ox.ac.uk/how/>).
    - ELIXIR Innovation and SME programme.

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<http://cloudsme.eu/> - <http://www.cloudforeurope.eu/> - <http://www.cloudingsmes.eu/> - <http://www.ocdirectory.org/organization> - <http://www.eu-maths-in.eu/> - <http://www.fortissimo-project.eu/>

- PRACE industry events.
- Almere Big Data Value Centre organised events for SMEs.

### Local/National Business Engagement Centres

Dedicated Business Engagement Centres in a few NGIs (e.g. 3-7). This is a seed for future enlargement acting as a learning structure to define, develop, and test mechanisms that can later be adopted at a larger scale.

- A lightweight survey/ mailing list message among all EGI members for recruiting those willing NGIs will be conducted. Especially interesting are those NGIs with experience in liaising with the business sector.
- Proposing the creation of an 'EGI Industry Ambassador' or Business Developer figure – possibility to add the role to an existing outreach figure (NIL, champion) or creating a brand new one.

Activities that the Business Engagement Centre Network is proposed to conduct:

- Mapping and contacting the SME associations and similar organisations that can bridge with SMEs and other business at local level and identify the responsible persons and contact details.
  - This activity is essential because these organisations have a deep understanding of the needs and potential of their SMEs for collaboration with EGI. Its multiplying effect has a big impact with a relatively small effort.
- Characterise (market analysis) the most potential sectors/segments for collaboration: the ones having the largest size (number of companies), rapid growth, more dynamic, more innovative, etc.
  - e.g. Bioinformatics as undeserved segment. The new technologies in DNA sequencing are making available a big amount of data that can be processed and turned into business opportunities.
  - Food and agriculture, Earth Sciences, ...
- Produce suitable marketing materials for approaching SMEs/business localised at their local market.
  - Adaptation and localisation of the material produced at the European level and own material if needed.
  - A clear message and offering has to be developed. Some possible examples are (for more examples check:
    - Membership to Business Engagement Programme
    - Participation in selected EGI projects
    - Standard/tailor-made support package
- Participate in events and public contributions representing EGI and business engagement in their area of responsibility.
- Actively look for and reach out to SMEs/other business in their area of responsibility.
- Organise workshops, master class and similar events to raise the awareness of EGI offering and promote activities (similar to typical sales activity). Some of the NGIs have already done it by individual initiative. Those NGIs with less experience can start by participating/collaborating with the ones organised at a European level, and when ready work on a more independent basis.
- Participate in internal workshops and activities aimed to increase their skills in these activities (as those organised by the business centre network at a European level).

### Annex 3 – Example of Support Package

This is an example of one possible supporting service, which can be agreed at a local level by the EGI member and the supported Business Programme member. This can be done on a pay-for-use, or completely for free or a combination of both. The experience shows that this package is very effective in supporting SMEs and has good impact on the acquisition of future clients (on a pay-for-use business model), but also as a way of proving effective actions for knowledge transfer. The benefits can be tracked down also to the improvement of the EGI member skills in technological channels and serving users communities.

1. **Pilot:** Free access to infrastructure for a limited period of time + 10/20 hours of support consultancy. Requires an internal time tracking system for accounting consultancy time.
2. **Project development:**
  - The resource centre services such as infrastructure resources and/or consultancy are offered to the SME/company on a pay-for-use basis. The pricing strategy is aligned to market price, other pricing schemes are possible though.
  - The company deploys their software in a distributed environment. They can also purchase (not compulsory) additional consultancy services from them.
3. The developed software item (e.g. running algorithm, application) goes into **Production:**
  - The collaboration continues if the EGI Resource Centre's mandate allows selling infrastructure services for commercial production. Otherwise, the collaboration ceases here. Support for transferring the software to another resource provider (such a commercial cloud provider).

This package is divided in three phases to take into account the fair competition rules. The first two phases are considered pre-competitive, whereas the third enters into the domain of commercial production. The Resource Centres composing EGI have a very diverse nature and they can decide whether they take this model, what is the pricing policy, and when ceases or continues the collaboration. Supporting this transfer can still be part of the mission as in some nations requires that knowledge activities have to be made available to all.



## **Annex 4 – Example of Hackathon, Datathon or hybrid event**

The event can be collocated with an EGI forum or related activity. The data can be dedicated to one specific discipline (earth sciences, agriculture, or open).

Applicants are invited to register submit their entries, on open data facilitated by a research instrument infrastructure. Entries can be innovative, curated and re-usable high-quality datasets and/or data-based applications. An EGI resource centre put at the disposition of the participants computational capacity for running the test.

All applicants have to conform to the eligibility criteria stated by the organisers (EGI + Scientific Infrastructures). The entries are assessed based on agreed selection criteria. A panel of judges specifically appointed will assess the entries and decide on a winner (or several categories) and runner-up (or several) for the Hackathon, Datathon or hybrid.

The prize can be the recognition of the award in the webpage, media as winner of the contest and/or support to further development of the awarded application or idea.