



EGI-InSPIRE

ANNUAL REPORT ON EGI AND ITS EXTERNAL RELATIONS ACTIVITY

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Abstract

This document reports on the external relations activities for EGI-InSPIRE. It reviews the main activities completed during the year and the impact of these activities to date. The document covers the work of the dissemination teams, the policy development team (the policy groups within EGI that PDT support and the various categories of external partners outside of it that EGI-InSPIRE collaborates with) and of the major events organised by the event teams in EGI.eu and the NGIs.



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II. DELIVERY SLIP

	Name	Partner/Activity	Date
From	Steven Newhouse	EGI.eu	04/03/2011
Reviewed by	Moderator: Steve Brewer Reviewers: Chris Brown, R. Vandenbroucke	EGI.eu JISC BELNET	05/04/2011
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Issue	Date	Comment	Author/Partner
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2	01/03/2011	Revised ToC	D Marinovic / EGI.eu
3	04/03/2011	First draft on policy part	D Marinovic / EGI.eu
4	08/03/2011	Internal review of policy part	S Andreozzi/EGI.eu
5	08/03/2011	First draft of dissemination/events part	C Gather/EGI.eu
6	09/03/2011	Second draft on policy part	D Marinovic / EGI.eu
7	11/03/2011	Internal review of policy part	S Holsinger/EGI.eu
8	11/03/2011	Third draft on policy part	D Marinovic / EGI.eu
9	14/03/2011	Second draft of dissemination/events	C Gater/EGI.eu
10	14/03/2011	Further review	D Marinovic / EGI.eu S Holsinger/EGI.eu
11	17/03/2011	Review	S Newhouse/EGI.eu
12	05/04/2011	Response to review	C Gater / EGI.eu

IV. APPLICATION AREA

This document is a formal deliverable for the European Commission, applicable to all members of the EGI-InSPIRE project, beneficiaries and Joint Research Unit members, as well as its collaborating projects.

V. DOCUMENT AMENDMENT PROCEDURE



Amendments, comments and suggestions should be sent to the authors. The procedures documented in the EGI-InSPIRE “Document Management Procedure” will be followed:

<https://wiki.egi.eu/wiki/Procedures>

VI. TERMINOLOGY

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



VII. PROJECT SUMMARY

To support science and innovation, a lasting operational model for e-Science is needed – both for coordinating the infrastructure and for delivering integrated services that cross national borders. The EGI-InSPIRE project will support the transition from a project-based system to a sustainable pan-European e-Infrastructure, by supporting ‘grids’ of high-performance computing (HPC) and high-throughput computing (HTC) resources. EGI-InSPIRE will also be ideally placed to integrate new Distributed Computing Infrastructures (DCIs) such as clouds, supercomputing networks and desktop grids, to benefit user communities within the European Research Area.

EGI-InSPIRE will collect user requirements and provide support for the current and potential new user communities, for example within the ESFRI projects. Additional support will also be given to the current heavy users of the infrastructure, such as high energy physics, computational chemistry and life sciences, as they move their critical services and tools from a centralised support model to one driven by their own individual communities. The objectives of the project are:

1. The continued operation and expansion of today’s production infrastructure by transitioning to a governance model and operational infrastructure that can be increasingly sustained outside of specific project funding.
2. The continued support of researchers within Europe and their international collaborators that are using the current production infrastructure.
3. The support for current heavy users of the infrastructure in earth science, astronomy and astrophysics, fusion, computational chemistry and materials science technology, life sciences and high energy physics as they move to sustainable support models for their own communities.
4. Interfaces that expand access to new user communities including new potential heavy users of the infrastructure from the ESFRI projects.
5. Mechanisms to integrate existing infrastructure providers in Europe and around the world into the production infrastructure, so as to provide transparent access to all authorised users.
6. Establish processes and procedures to allow the integration of new DCI technologies (e.g. clouds, volunteer desktop grids) and heterogeneous resources (e.g. HTC and HPC) into a seamless production infrastructure as they mature and demonstrate value to the EGI community.

The EGI community is a federation of independent national and community resource providers, whose resources support specific research communities and international collaborators both within Europe and worldwide. EGI.eu, coordinator of EGI-InSPIRE, brings together partner institutions established within the community to provide a set of essential human and technical services that enable secure integrated access to distributed resources on behalf of the community.

The production infrastructure supports Virtual Research Communities (VRCs) – structured international user communities – that are grouped into specific research domains. VRCs are formally represented within EGI at both a technical and strategic level.



VIII. EXECUTIVE SUMMARY

This report describes the EGI external relations activity taking place during the first year of the EGI-InSPIRE project running from May 2010 to April 2011. The document covers the activities of the dissemination teams, the policy development team (the policy groups within EGI that PDT support and the various categories of external partners outside of it that EGI-InSPIRE collaborates with) and the major events organised by the event teams in EGI.eu and the NGIs.

Dissemination in EGI-InSPIRE aims to communicate EGI's activity both within the project and worldwide. This document summarises the dissemination activities during the first year of the project, including content developed for the main EGI website and an overview of other materials produced such as news items, newsletters and Director's Letters. The dissemination team has also highlighted the success stories achieved using the infrastructure and developed case studies for brochures, news items, blog posts and articles for external publications. The dissemination team has reached out to new and existing users of the infrastructure through events and exhibition booths, and a summary of the events attended is included. The dissemination team has made some progress in making contact with the wider Dissemination teams based in the NGIs and has held face-to-face meetings and sessions at the EGI major meetings. However, engagement by NGIs in dissemination has been slow to show results, and there is not yet a sense of a coordinated, distributed team. In future, the team needs to build on the dissemination networks across Europe, and make its expectations from the NGIs clearer, gathering requirements from the NGI's to make the best use of the central and distributed resources.

The events task provides support and management for the two large community-driven events organised by the collaboration each year: the Technical Forum and the User Forum. This review document summarises the organisational, policy and dissemination activities supporting the two large events that have been held during the first year of EGI-InSPIRE: the EGI Technical Forum 2010 in September 2010 in Amsterdam and the EGI User Forum 2011 in April 2011 in Vilnius, held in conjunction with the EMI Technical Conference. Plans are also underway for the next Technical Forum in Lyon in September 2011.

After several rounds of consultation between the PDT, Group Chairs, EGI.eu Director and Executive Board and other stakeholders, the Terms of Reference (ToRs) clarifying the purpose, composition and operational procedures have been approved for all policy groups: Technical Collaboration Board, Operations Management Board, Operational Tools Advisory Group, Operations Automation Team, User Community Board, User Support Advisory Group, Security Policy Group, Software Vulnerability Group, Security Coordination Group and EGI Computer Security Incident Response Team. The groups have started with regular meetings. One of the major objectives during the first year of EGI-InSPIRE was the establishment of the Policy Development Process (PDP). Some of the major policy papers created during the first year include dealing with the EGI role in regards to the latest strategic developments of the European Union, EGI sustainability plan, cloud and virtualisation integration into EGI, ERIC Legal Framework, and Standards roadmap.

Collaborations were established informally (e.g. through participation in reciprocal events) and formally via membership or Memorandum of Understanding (MoU) with a number of projects. One of the distinctive examples of this collaborative activity has been through the cooperation with the



other five European Commission-funded projects related to Distributed Computing Infrastructures (DCIs) –EMI, IGE, EDGI, StratusLab and VENUS-C. It should be noted that two MoUs (EMI and IGE) have been signed while several more are in advanced negotiation. Furthermore, collaboration with different categories of external partners was improved and intensified, whereby EGI representatives took a leading role in a number of initiatives and actions including developing new policy standards, policies and guidance. Overall, EGI representatives attended the three OGF meetings and the Open Grid Forum CAOPS Working Group, three e-IRG meetings, two EUGridPMA meetings, two IPG meetings, four IGTF meetings and one EEF meeting.

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1 INTRODUCTION

The External Relations work package in EGI-InSPIRE includes activities in the areas of policy, dissemination and events.

Ensuring a sustainable grid infrastructure for European scientists is not only a technical and operational challenge, it also requires the establishment of sustainable and effective policies within the EGI community as well as collaboration with various categories of external partners (e.g. other DCI projects and organisations, international policy bodies etc.). EGI.eu, the coordinating body for the EGI community established an effective framework for gathering together all stakeholders. This framework was achieved by defining policy development processes and creating policy groups in specific functional areas, from user community requirements, operations to software vulnerability issues and general governance. These groups bring the various stakeholders to the same table to define the EGI policies and procedures in order to guide EGI's progress towards a common goal. Collaboration with different categories of external partners included cooperation with technology providers, non-European resource infrastructure providers, virtual research communities, support projects and international policy bodies.

Dissemination in EGI-InSPIRE aims to communicate EGI's activity both within the project and worldwide. This includes developing content for the main EGI website, www.egi.eu, producing regular updates through news items, newsletters and Director's Letters. The dissemination team also highlights the success stories achieved by researchers using the infrastructure, for example by developing case studies brochures, news items, blog posts and articles for publications such as International Science Grid This Week (iSGTW). The dissemination team also reaches out to new and existing users of the infrastructure through events and exhibition booths.

Also within the External Relations team, the events task provides support and management for the two large community-driven events organised by the collaboration each year: the Technical Forum and the User Forum. The location of each event is selected by the EGI Council following an open bidding process from the NGIs. For each meeting, a dedicated Programme Committee (under a Programme Chair), is drawn from the community, and a Local Organising Committee is set up with members drawn from the EGI project office and the local organisers. Two large events have been held during the first year of EGI-InSPIRE: the EGI Technical Forum 2010 in September 2010 in Amsterdam and the EGI User Forum 2011 in April 2011 in Vilnius, in conjunction with the EMI Technical Conference.

The document is structured as follows: Section 2 provides an overview of dissemination and policy external relations activity. Section 3 goes into details explaining the dissemination activities in the first year of EGI-Inspire project, while Section 4 describes policy activities in the first year. Following this, Section 5 describes events organised by the dissemination and policy development team. Finally, Section 6 deals with the concluding remarks and future plans.



2 EXTERNAL RELATIONS ACTIVITY IN EGI

2.1 Overview

EGI-InSPIRE is a large and distributed collaboration, and as a result communication and community building are important project-wide functions that go beyond individual project tasks. The EGI community includes those directly involved in the EGI-InSPIRE project itself, but also those involved in tightly affiliated projects, such as the middleware providers and the distributed user community. EGI also liaises closely with the Distributed Computing Infrastructure (DCI) projects funded alongside EGI-InSPIRE, such as IGE [R36], EMI [R37], StratusLab [R38], Venus-C [R39] and EDGI [R40]. EGI-InSPIRE will work with these and other relevant projects to identify opportunities for mutual collaboration, reduce overlaps between the projects and present an integrated roadmap to the community.

2.2 Dissemination

The purpose of the dissemination tasks in EGI-InSPIRE is to communicate EGI's activity within the project and worldwide. This is achieved through a central team based at EGI.eu and through dissemination contacts located within the NGIs and related EC-funded projects, such as SIENA and e-ScienceTalk. The TNA2.2 task maintains and develops content for the main EGI website, www.egi.eu, and produces the monthly Director's Letter, the quarterly newsletter, *Inspired*, and also develops case studies and success stories to be published in various formats, including brochures, news items, blog posts and articles for publications such as *International Science Grid This Week (iSGTW)*. The dissemination team also supports EGI's participation at European and international distributed computing meetings, through exhibition booths, presentations and promotional materials, and coordinates the outreach plan based on EGI's two annual meetings: Technical Forum and User Forum.

2.3 Policy

EGI's policies are the backbone of the EGI strategic framework and are defined as clear, formal and mandatory statements or positions adopted by the EGI governance bodies for issues relevant to the EGI community. EGI policies cover a wide range of issues, starting from long-term strategic cooperation with other e-Infrastructure providers, to specific problems affecting the EGI community.

The EGI policy groups [R4] and the EGI.eu Policy Development Team (PDT) lead the policy development within EGI. The EGI policy groups are authorised by the EGI Council through the EGI.eu Executive Board to investigate any activity within its Terms of Reference (ToR), hence, making the EGI Council and the EGI.eu Executive Board their governing bodies. The PDT and the policy groups support the formulation and development of policies to be used by the European DCIs. EGI policies link the long-term strategic cooperation of different parties with the day-to-day technical activity.

Policies are developed internally by policy groups and in collaboration with external partners. Firstly, the PDT provided support to the policy groups within EGI who are defining policies and procedures for evolving the technical infrastructure, for its operation and for the access by the various Virtual Research Communities (VRCs). Following this, common policies and policy standards were developed by cooperating with and participating in activities of various international policy bodies (e.g. OGF [R41], e-IRG [R42]). Collaboration with external partners was facilitated through the establishment of Memoranda of Understanding (MoUs) (see Section 4.2.1). Thus, the PDT acts as a point of contact for

projects that are collaborating with EGI-InSPIRE, formalising and facilitating the relationships between those projects and EGI-InSPIRE activities.

One of the major achievements during the first year of EGI-InSPIRE was the establishment of the Policy Development Process (PDP) [R5]. The PDP was established in order to outline and provide rules on how policies and procedures relating to the pan-European Grid Infrastructure are developed by and for the EGI community. The PDP governs all EGI policies and procedures¹ and all participants in policy development within EGI are required to follow it.

Strategic policy papers are also needed to construct a stable, reliable and flexible EGI policy framework. EGI policies should provide reliable, long-term and strategic direction for EGI.eu management and the EGI community, and be a direct, strategic link between the EGI.eu mission and EGI daily activities. Some of the major policy papers created during the first year include dealing with EGI's role in regards to the latest strategic developments of the European Union, the EGI sustainability plan, the integration of cloud and virtualisation into EGI, the ERIC Legal Framework, and the EGI Standards roadmap (See Section 4.4).

2.4 Metrics

The project metrics for NA2 dissemination and policy are listed below, as outlined in D1.1 Quality Plan and Metrics [R2]:

Metric ID	Metric	Public / Internal	No. (PQ1-3)	Task
M.NA2.1	Number of press releases issued	P	2	TNA2.2
M.NA2.2	Number of media contacts following press releases	P	7	TNA2.2
M.NA2.3	Number of press cuttings relating to EGI, EGI.eu or EGI-InSPIRE	P	49	TNA2.2
M.NA2.4	Number of interviews given to media organisations	P	8	TNA2.2
M.NA2.5	Number of papers published by users of EGI	P	19	TNA2.2
M.NA2.6	Public events organised by EGI.eu & NGI teams	P	4	TNA2.2
M.NA2.7	Events with EGI presence (stand, presentation, or literature)	P	18	TNA2.2
M.NA2.8	Number of unique visitors per month on the main websites	P	14,016	TNA2.2
M.NA2.9	Number of MoUs or agreements signed with technology providers	P	2	TNA2.3 & TSA2.1
M.NA2.10	Number of MoUs or agreements signed with external (non-EGI) resource providers	P	0	TNA2.3 & TSA1.1

¹ The terms policies refer to the clear, formal and mandatory statements and positions of general nature adopted by the EGI.eu governance bodies for issues relevant to the EGI community. The terms procedures refer to the step by step written and approved specification of how to complete a specific task or process. Procedures are designed to achieve a uniform approach in compliance with EGI.eu policies followed by EGI community [R5].

M.NA2.11	Number of MoUs or agreements established with collaborating virtual user communities	P	0	TNA2.3 & TNA3.1
M.NA2.12	Number of operational procedures recorded by EGI.eu	P	7	TNA2.3

Table 1 – NA2 Metrics

During the first three quarters, the metrics show that a good number of events have been attended by the dissemination team at 18, with 4 events organised by NGIs. Two press releases were issued generating nearly 50 press cuttings and 8 interviews. Nearly 20 papers were published; the webstats are covered in more detail in Section 3.3.1 below.

During the PQ1, PQ2 and PQ3 EGI signed two MoUs with technology providers (see Section 4.2.1) and recorded seven operational procedures [R47].



3 DISSEMINATION

3.1 Dissemination Plan

The dissemination plan for EGI-InSPIRE is outlined in D2.2 Dissemination Plan [R1]. It provides an overview of the dissemination activities for EGI-InSPIRE. The aim is to disseminate the work of the EGI and its user communities both within the project and worldwide. The dissemination task is coordinated by EGI.eu in Amsterdam. Additional national dissemination includes contributions from 37 partners across Europe and beyond, including 31 funded European partners, and 6 unfunded non-European partners in Taiwan, Australia, Singapore, Indonesia, Malaysia and the Philippines.

EGI-InSPIRE is working to establish collaborations with external partners such as technology providers, European and International e-Infrastructure providers, dissemination and coordination projects, international policy bodies and virtual research communities. The dissemination team also works with a range of projects through these collaborations, including projects such as e-ScienceTalk and SIENA.

The Dissemination Plan identifies the primary target audiences for the dissemination outputs, including new and existing user communities, journalists, general public, grid research and standards communities, resource providers, collaborating projects, decision makers and governmental representatives. Also included are a suggested set of messages that can be used to target these audiences effectively.

The Dissemination Plan is a work in progress, and will be updated annually in Deliverables D2.9, D2.15 and D2.22, in synchronisation with the annual reviews of the project website (MS207, 220, 231, 242) and the updates to the Dissemination Handbook (MS203, 217, 228, 238).

3.2 Success Factors

To achieve success in disseminating the project's core messages to its wide range of audiences, the following critical success factors should be met during the lifetime of the project:

- **Effective communication within NA2.2.** For a project of this size it is vital that NA2.2 partners maintain good communication channels.
- **Close collaboration with NA1 and the Policy team.** A close working relationship is essential to ensure messages are accurate and consistent across the whole project.
- **Build on the NA3 networks.** Use networks reached through the user support activities to disseminate the project's messages as widely as possible and to foster new user communities. NA2.2 and NA3 must also coordinate their attendance at events in order to reinforce each other.
- **Clear internal communication of what NA2.2 requires from the other activities to achieve its aims.** Communicate what NA2.2 needs from the other activities to achieve success e.g. timely input of information, regular updates of project webs, leads to potential new users or scientific fields, suggestions for events to attend, early notification of press opportunities, details of key achievements.



- **Manage expectations through clear communication of the task's implementation plan.** The activity will concentrate its resources where it can achieve the biggest wins for the project.
- **Make optimum use of budgetary resources.** The aim is to achieve high production values at a reasonable cost, with re-use of content across a wide range of media e.g. press releases, web, blogs, publicity materials.
- **Build a sense of community.** The dissemination activities should foster a sense of community among new and existing users and also between the activity partners.
- **Reinforce realistic expectations of grid technology.** NA2.2 should communicate both the benefits of grid and DCI technology and also its current limitations.
- **Establish communications channels with NGIs.** Pass information to all NGIs and EIROs, including those who are not partners in EGI-InSPIRE and ensure that the NGI's own communication channels are exploited.

In addition to these qualitative success factors, quantitative progress towards achieving the dissemination team's aims to reach out to its audiences will be measured through the quality metrics, listed above.

3.3 Means for dissemination

The Dissemination Plan outlines the means for dissemination, including the project website and web design, materials and publications, media and public relations, social media and events and marketing to new users.

3.3.1 Main website and wiki

At the start of the project, the main EGI website consisted of a basic shell in terms of design and content. Early in the project, in PM4, TNA2.2 carried out a review of the website for MS207. This milestone identified areas of the website that required further work and previewed new templates and layouts that reflected the new branding developed for the project. Content was developed for a number of areas of the website, including the press area, the user support area and the governance areas. TNA2.2 worked with other work packages to identify contacts that can help to keep the technical areas of the website updated.

A new version of the website was launched in September 2010, and the improved design, layout and content were reflected in the web statistics. As a result, in PQ2, the website received more than 3600 unique visitors, an increase of 85% on the first quarter. The bulk of these visited during the EGITF2010 event, generating over 8000 visits, 35% of which were new visits and a total of nearly 35,000 page views. During PQ3, there have been around 7700 visits, corresponding to around 32,000 page views per month.

The dissemination team has continued to develop the content of the website throughout the project year, focusing on the EGI-InSPIRE project pages and the 'About' pages, introducing EGI as a whole. Examples of new content include a new Frequently Asked Questions section (<http://www.egi.eu/about/faq/>) aimed at the general public, a brief History of EGI



(http://www.egi.eu/about/history_of_EGI.html) and an updated list of the projects metrics (<http://www.egi.eu/projects/egi-inspire/metrics/index.html>). The Glossary, Staff pages, EGI-InSPIRE's Deliverables and Milestones and other pages have been updated as required. Since the beginning of January 2011, there has been an increase in the rate of publication of website news items. As a result of progress within EGI and the development of a network of dissemination contacts, at least two stories are published per week. The team has also worked closely with CESNET and the EGI-InSPIRE work package leaders to set up an EGI blog², which now includes regular contributions from across the project and wider community.

The project wiki site³ has been regularly updated during the course of the project and new templates have been developed for standard pages. The site now contains project information, and is used as a community area by NA3. Quality processes and metrics are included in the site, and metrics for SA1 are now gathered each quarter using the wiki. Contributions to milestones such as MS108 Review of Global Tasks are also collected using the wiki site. The dissemination team has helped to shape the wiki by providing consultative expertise where required.

3.3.2 Materials and publications

The dissemination team has worked to develop the branding for EGI and EGI-InSPIRE during PQ1. A designer was commissioned to develop logos for use on printed materials and on all EGI websites, which were launched at the EGITF 2010 event in September and rolled out to all EGI products in the following months. A guide to usage of the logo, fonts and corporate colours is included in MS203, the Dissemination Handbook.

A project presentation template has been developed and a standard project presentation has been added to the website for download by partners. The dissemination team has also issued 12 Director's Letters⁴ for each month of the project. Four editions of the project newsletter, EGI Inspired were also published: Summer 2010, Autumn 2010, Winter 2010 and Spring 2011⁵. A series of articles about EGI were written by a freelancer for *International Science Grid This Week*, a weekly e-science publication produced by collaborating project, e-ScienceTalk, which was issued to 6800 subscribers. These included interviews with Steve Brewer, CSO <http://www.isgtw.org/?pid=1002645> and Tiziana Ferrari, COO, <http://www.isgtw.org/?pid=1002692>, event announcements and an EGI Video of the Week.

A number of new publications were produced in preparation for attendance at events, including posters on EGI-InSPIRE and User Community Support, poster and postcards advertising the EGI User Forum in Vilnius and the Technical Forum in Lyon, a general brochure on EGI and pop up banners.

3.3.3 Media and public relations

A press mailing list has also been set up at press@mailman.egi.eu to facilitate issuing press releases to media contacts. The media are able to contact the EGI.eu dissemination team directly through the press@egi.eu email address.

A media invitation to the EGI Technical Forum in Amsterdam was issued in September 2010, leading to articles in the local Dutch press, HPCwire and SuperComputing Online. Articles featuring EGI are

² <http://www.egi.eu/blog/>

³ https://wiki.egi.eu/wiki/Main_Page

⁴ http://www.egi.eu/results/Directors_letters/

⁵ <http://www.egi.eu/results/newsletters/>



listed on the website⁶ and regularly updated. A media training session was also held at the EGI Technical Forum, featuring journalists from the Times Higher Educational Supplement and iSGTW⁷.

A 'talking to the media' training day was also held at EGI.eu on 2 December 2010 for senior members of the EGI-InSPIRE project team. The event covered practical advice on how to target the media with success stories, and techniques for radio and TV interviews. A summary of the course is available to project members on the wiki at https://wiki.egi.eu/wiki/TNA2.2_Dissemination.

A summary of the media outreach for the EGI Technical Forum is included in section 5.2.

3.3.4 Social media

A number of social media channels have been set up with EGI branded content, included Facebook, LinkedIn, FourSquare, YouTube, Twitter, Flickr and iPhone apps. The news feed from the main website is fed out through the Twitter account, so is updated regularly. The other channels are mainly activated in support of outreach plans for EGI events. A report on how social media channels were used during the EGI Technical Forum in Amsterdam in September 2010 is included in section 5.2.

3.3.5 Events and marketing to new users

During the year, the dissemination team has attended a number of events, including ICT 2010 in Brussels, 27-29 September, attended by 6000 delegates. EGI shared a joint booth in the Exhibition focusing on e-Infrastructures and climate change, alongside EUIndiaGrid, EUMedGridSupport and e-ScienceTalk, as well as other projects. EGI hosted a booth at OGF30/GRID2010 in Brussels, 25-28 October. Also in October, 27-29, EGI travelled to eChallenges, a well-attended policy event, running a stand in the Exhibition area in collaboration with e-ScienceTalk.

The EGI dissemination team also represented the project at the 8th e-Infrastructure Concertation event at CERN on 4-5 November and the NGS Innovation Forum, 23 November, Didcot UK, publishing blog posts on the e-ScienceTalk GridCast blog (www.gridcast.org). EGI booths were also hosted at SciTech in Brussels on 23 November, and also at SC10, 15-19 November in New Orleans, an event attracting more than 10,000 delegates. The dissemination team also supported a booth at the European Women in Science, Innovation and Technology in Budapest in March as part of the gender action activities. EGI provided a presentation for the CloudScape-III event in Brussels in March.

3.3.6 Collaboration with NGIs

In the initial months, effort was devoted to setting up the basic communication channels with NGIs in the EGI-InSPIRE project, including the inspire-na2-dissemination mailing list and the NA2.2 pages on the EGI Wiki site⁸.

TNA2.2 established communication with the NGI contacts at a face-to-face NGI dissemination meeting at EGITF2010, attended by around 20 people. The session aimed to establish ways to work together effectively and to share ideas for promoting EGI-InSPIRE in the different regions. The meeting introduced the NA2.2 wiki pages as a key mechanism for facilitating this process, and the content of this area has been developed during the course of the year. The full list of contacts is now available at https://wiki.egi.eu/wiki/TNA2.2_Dissemination#Team

⁶ <http://www.egi.eu/results/articles/>

⁷ <http://www.go.eu/jrvut>

⁸ https://wiki.egi.eu/wiki/TNA2.2_Dissemination



Efforts from NGIs have included maintaining local websites, translating materials and collecting success stories and case studies. CSC provided essential dissemination support during PQ1 while key members of staff were being recruited to the central team, working on the project website and drafting press releases, general articles and presentations. Partners have also issued articles to local publications and have prepared dissemination materials for conferences, events and press. Some materials have been targeted to academia and also to hi-tech companies. Partners outside Europe in Australia have worked towards further building the grid user base and influencing national policy around grid middleware and implementation.

E-Arena in Russia participated in organising a seminar dedicated to M.G.Mescheryakov's 100th anniversary in Dubna and prepared the Proceedings of the 4th International Conference "Distributed computing and Grid-technologies in science and education- GRID2010" including 67 scientific articles. A series of articles about the GRID2010 conference were published in five issues of the weekly newspaper "DUBNA: Science, Cooperation, Progress", titled "*Everything, or nearly so all about Grid: in Dubna, in Russia, in the world*". Grid-Ireland was credited in two scientific talks at the Royal Irish Academy conference "The Transient Universe: from exoplanets to hypernovae" (<http://url.ie/81a3>).

LIP has participated in the organisation of the IBERGRID conference, namely in establishing the conference program for 2011 where one of the main topics will be EGI. They have also disseminated the details of the conference and EGI's participation to the scientific community. INFN has prepared materials such as posters, brochures and banners, and these were exhibited at the INFN booth at SC10. INFN also worked with the NA2.2 EGI team on an article on NGI researcher profiles for *Inspired*. IISAS has organised the 6th International Workshop on Grid Computing for Complex Problems GCCP2010, November 8-10, 2010, Bratislava, and held a press conference at the event, as well as featuring in an interview in Slovak scientific journal Quark and preparing materials for the Ministry of Education.

3.4 Summary

The full time members of the dissemination team did not join EGI.eu until several months after the start of the project, and in particular the designer did not join the team until January 2011. Initially, dissemination support was provided by a staff member at CSC. Despite this initial under-resourcing, a wide range of communications channels have been set up by the Dissemination team on behalf of the European NGIs and projects. The branding for the organisation has been established and regular communications have been issued on behalf of the central team. The team has also worked with the UCST to attend several key events.

The dissemination team has made some progress in making contact with the wider dissemination teams based in the NGIs and has held face-to-face meetings and sessions at the EGI major meetings. However, engagement by NGIs in dissemination has been slow to show results, and there is not yet a sense of a coordinated, distributed team. A small number of NGIs are yet to nominate dissemination contacts or to report effort for the activity. During the second year, the dissemination team will aim to enhance EGI.eu's role as a central coordination point for the NGIs, in order to improve their visibility nationally and internationally and also to act as a collaboration point between NGIs in different regions. Face-to-face meetings and Birds of a Feather sessions will be held at EGI events in order to facilitate this process, as these can be used as opportunities to discover the key requirements from the NGIs from EGI.eu and vice versa. NGIs will be encouraged to use central EGI channels such as the website, press contacts, newsletters, mailing lists, wiki and social media networks to disseminate their activities more widely. Templates for materials such as newsletters,



press releases and publications will also be shared with the NGIs and adapted to their needs as required.

The central dissemination team has established some individual external contacts, such as with the TERENA-CPR group, with GEANT and SIENA, and with the e-ScienceTalk project, and has sourced articles from NGIs for the newsletter. However, it needs to build on the dissemination networks across Europe, including establishing contact with NGIs that are not partners in EGI-InSPIRE, and make its expectations from the NGIs clearer, particularly in using local resources for events. The team also needs to gather requirements from NGIs more systematically to make the best use of the central resources. The team has not yet achieved much awareness of the project in the general press, although some articles have appeared in specialist IT publications such as iSGTW, EU Projects magazine and others. The dissemination team has therefore achieved more than anticipated in a relatively short space of time, in terms of setting up communications channels, attending events and producing materials. However, it needs to assess how best to leverage these channels, and build on the contacts that it has made in NGIs and in other projects, in order to use these most effectively to reach its audiences. This is particularly true for reaching out to new user communities and to the general public.

4 POLICY

4.1 EGI Policy Groups

During the first year of EGI-InSPIRE, the Policy Development Team (PDT) has supported the creation of EGI policy groups⁹ and their activities. Such groups are responsible for developing EGI's strategic and operational policy framework, hence, ensuring the stability and evolution of the e-Infrastructure.

Together with the Group chairs, the PDT has clarified the purpose, composition and operational procedures of each EGI policy group by defining Terms of References (ToRs). The adoption of ToRs ensures that responsibilities, composition and operational procedures were well defined¹⁰. All of the groups have been created under the governance of EGI.eu since they are expected to last beyond the life of the EGI-InSPIRE project and become permanent groups of the EGI community and coordinating organisation.

In order to achieve a minimum standard of quality and visibility for the activities of the groups, the PDT provides dedicated secretarial support for the groups, a standardised template for minutes of meetings and a periodic revision of the communication channels (e.g., wiki, EGI.eu website).

After several rounds of consultation between the PDT, Group Chairs, EGI.eu Director and Executive Board, the ToRs for the all policy groups have been approved: Technology Coordination Board (TCB) [R6], Operations Management Board (OMB) [R7], Operational Tools Advisory Group (OTAG) [R8], Operations Automation Team (OAT) [R9], User Community Board (UCB) [R10], User Services Advisory Group (USAG) [R11], Security Policy Group (SPG) [R12], Software Vulnerability Group (SVG) [R13], Security Coordination Group (SCG) [R14] and EGI Computer Security and Incident Response Team EGI CSIRT [R15]. The number of meetings held from the beginning of the EGI-InSPIRE project varies from group to group (see **Table 2**).

Policy Group	ToR adopted	Number of meetings
SPG	Yes	2
SVG	Yes	<i>Ad-hoc</i>
SCG	Yes	2
OMB	Yes	9
OTAG	Yes	3
OAT	Yes	2
UCB	Yes	2
USAG	Yes	2
TCB	Yes	5

⁹ A policy group is an internal EGI.eu body created to define policies and procedures within a specific functional area: technology, operations, user community, policy (security) and administration.

¹⁰ It is chaired by an elected or appointed member of the community who is an acknowledged expert in the appropriate subject area. The chair reports the progress of the group's work to the EGI.eu management. The policy groups operate upon transparency, accountability, openness and participatory principles. Policies are developed and defined through a bottom-up approach and consensus-based decision making. The policy discussions are held during regular face-to-face meetings, phone/video conferences or via the Group mailing list.

EGI CSIRT	Yes	Ad-hoc
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Table 2 – Policy Group Meetings

The detailed description of activities performed by the SPG and SVG is available in the milestone Security activity in EGI [R17]. OMB, OTAG and OAT activities are described in MS108 Global Task Review [R18] and MS109 NGI International Task Review [R19], while the TCB activity is described in TCB agenda and minutes of meetings [R20] and in D5.3 the Annual Report on the status of Software Provisioning activity and the work of the Deployed Middleware Support Unit. Finally, the activities of the UCB and USAG are reported in D3.2 Annual Report on the status of EGI’s User Services and Community Coordination [R21]. An agenda of all meetings and approved minutes of meetings are publicly available on EGI.eu policy group wiki pages.

4.1.1 Policy Development Process

Typical outcomes of the policy groups are policies or procedures that need to be accepted by EGI stakeholders and adopted by the EGI.eu governing bodies. For this reason, one of the important initial objectives of the PDT was to define a Policy Development Process (PDP) [R5], which governs the approval of policies and procedures produced by the EGI policy groups for the EGI community. The goal of the PDP is to ensure that all relevant parties, especially those affected by specific policies, have the opportunity to be part of policy discussions, review draft proposals and provide their input during the policy making process. Furthermore, the PDP is providing consistency by ensuring that all policies and procedures are treated in a similar fashion to prevent potential issues and conflicts and formalise a process of interaction between the participants in the policy development process.¹¹ The creation of the dedicated PDP was not part of the EGI-InSPIRE Description of Work; however, the PDT identified the strategic organisational need to create policy that will facilitate development of policies and procedures within EGI.

After intensive consultation with all EGI stakeholders and interested parties, the EGI.eu Executive Board approved the final version of the PDP in January 2011. Therefore, since January 2011 all policies and procedures created within EGI by any of the EGI Policy Groups follow steps and requirements prescribed in the PDP. As a tool to track the life-cycle of all the policies and procedures being produced, adopted and dismissed in EGI, a tracking tool was set up and configured [R22].¹²

4.1.2 Glossary Coordination Group

The policy groups are working independently and producing documents that need to be adopted within a large community such as EGI require a consistent usage of a core set of terms. In order to limit the proliferation of inconsistent glossaries, the EGI Glossary Coordination Group (GCG) was created [R23]. Its main goal is to define and maintain a shared set of terms across all the functional areas in order to enable a consistent usage of terms with a well-defined scope and stable meaning across EGI policies and procedures.

¹¹ The policy development process rests on three fundamental principles. The first principle is *openness*, meaning that the policy development should be open to all stakeholders and actors within EGI community and follows an established participatory process of collaboration. Interested parties concerned with policy development are welcome to contact the relevant policy group and in agreement with them take part in their policy discussions. The second principle is *transparency*, that is policy discussions and policy papers should be archived and available through the EGI document repository to all interested parties and stakeholders. The third principle is *consensus*, meaning that whenever possible, policy document approval should be based on consensus.

¹² Each policy/procedure should have a related ticket in the RT PDP queue. For policies/procedures approved before the entry into force of the PDP, a ticket should be created in the PDP queue as a record of the existence of the policy/procedure. For new policies/procedures, the ticket should be created and consultation with the policy development team should be made to agree on the document type and on the affected functional areas



The Policy Development Team drafted a preliminary list of terms with definitions coming from the existing glossaries and will work on unifying their meaning under the consensus of the GCG. Requests for the introduction of new terms and definitions or review are submitted to the mailing list and the Chair will decide what is the most appropriate mode to deal with these requests.

The group will periodically release a document "EGI Glossary", which will consist of the most updated agreed set of terms. All of the future EGI policies and procedures documents must reference the specific "EGI Glossary" version and the related section and use the terms consistently.

4.2 Collaboration with external partners

EGI.eu is made up of various Resource Infrastructure Providers, which group national level resource centres into a federated e-Infrastructure. There are a number of external actors who participate in the wider EGI ecosystem that are essential for the sustainable delivery of the services.

To nurture such collaborations, EGI.eu needs to establish and formalise agreements with relevant partners on the European and global level. External policies need to be established in consultation with all the relevant organisations within the EGI community and with projects and organisations that EGI community interact.

Collaborations can be established in different ways: informally (e.g. through participation in reciprocal events) or formally via membership or Memorandum of Understanding (MoU). One of the distinctive examples of this collaborative activity has been through the cooperation with the other five European Commission-funded projects related to Distributed Computing Infrastructures (DCIs) – EMI, IGE, EDGI, StratusLab and VENUS-C. Together, a collaborative DCI Roadmap has been developed that describes a vision of moving from the current production e-Infrastructure in Europe to one based upon federated virtualised resources and records individual interactions between the six projects, in relation to this goal [R32].

The relevant categories of external partners are [R33]:

- 'Technology providers', vital to develop and deliver robust and user-centric software to enable and run EGI; the collaboration is formalised via an MoU and entitles the partner to become a member of the Technical Collaboration Board (voting member after signing the SLA).
- 'Non-European Resource Infrastructure providers', bringing benefit to the EGI user community in terms of available resources and stimulating the expansion and contact with potentially unknown research groups; the collaboration is formalised via an MoU and entitles the partner to become a member of the Operations Management Board (voting member after signing the OLA).
- 'Virtual Research Communities', the end-users who need to collaborate across borders and achieve/share scientific results; listening to their requirements for evolving the infrastructure; the collaboration is formalised via an MoU and entitles the partner to become a member of the User Community Board.
- 'Support projects', area of dissemination to maximise the impact of EGI activities and in the area of 'coordination' to support EGI in engaging other DCIs in defining strategic priorities and long-term visions; the collaboration is formalised via an MoU.
- 'International policy bodies', produce strategic and technical policies for DCIs; the collaboration is typically formalised via membership or via informal participations to events.

4.2.1 Memorandum of Understanding

In EGI, a Memorandum of Understanding (MoU) defines a bilateral framework of collaboration between EGI.eu or EGI-InSPIRE and a partner to achieve common objectives [R24]. The written agreement specifies a joint work plan, roles, responsibilities and milestones. **Table 3** summarises the list of MoUs that were signed or are under negotiation with EGI.eu or EGI-InSPIRE and the area of collaboration they cover. On the EGI side, the MoU is typically signed by EGI.eu since this is the organisation set up for long-term sustainability and coordination of EGI, while EGI-InSPIRE is involved in the collaborations that are strictly focused on its activities as a European-funded project. It should be noted that two MoUs have been already signed while few more are in a mature negotiation stage.

#	Partner 1	Partner 2	MoU status	Partner type
1)	EGI.eu	IGE	Signed	Technology provider
2)	EGI.eu	EMI	Signed	Technology provider
3)	EGI.eu	WLCG	Draft	VRC
4)	EGI.eu	WeNMR	Final negotiation	VRC
5)	EGI.eu	e-ScienceTalk	Draft	Support/Dissemination
6)	EGI.eu	SAGA	Final negotiation	Technology provider
7)	EGI.eu	gSLM	Draft	Support/Service Level Management
8)	EGI.eu	FURJ	Final negotiation	Resource Infrastructure Provider
9)	EGI.eu	StratusLab	Draft	Technology provider
10)	EGI.eu	SAGrid	Draft	Resource Infrastructure Provider
11)	EGI.eu	DECIDE	Final negotiation	VRC
12)	EGI-InSPIRE	GISELA	Final negotiation	Support/Engaging Latin-America
13)	EGI-InSPIRE	Erina+	Draft	Support/Impact evaluation
14)	EGI-InSPIRE	CHAIN	Draft	Support/Engaging Africa and Asia

Table 3 – MoUs under negotiation with EGI.eu/EGI-InSPIRE

A number of factors influenced the finalisation of MoU negotiations:

- 1) MoU templates for each category required time to be understood and formalised.
- 2) Defining a detailed joint work plan not only requires longer negotiations about mutual activities but also deeper understanding of project specifics.
- 3) Clear list of policies and procedures that were in progress needed to be finalised in order to move forward with some partners.
- 4) The approval of final versions require agreements by the members of the consortium in each partner.
- 5) Understaffing of the PDT in the start-up phase of EGI.eu affected the number of MoU negotiations in parallel.



Factors no. 1 and 5 can now be considered resolved, factor no. 3 is under mitigation, while issue no. 2 and 4 are inherent to the MoU negotiation process.

4.2.2 External policy activities (OGF, IPG, EEF, IGTF, EUGridPMA, E-IRG)

EGI is participating in the work of the e-Infrastructure Reflection Group (e-IRG) [R42], the European e-Infrastructures Forum (EEF) [R43], the Open Grid Forum (OGF) [R41], the Infrastructure Policy Group (IPG) [R44], the EUGridPMA [R45] (thus also the International Grid Trust Federation or IGTF[R46]).

The Open Grid Forum (OGF) is a community of users, developers and vendors leading the global standardisation effort for grid computing. EGI participates in the OGF events mainly for monitoring the progress of the working groups, bringing requirements either directly in the groups, or indirectly through the technology providers, and for aligning the EGI standards roadmap with the evolution of the activities. In the first year of EGI-InSPIRE, EGI-InSPIRE representatives have participated in OGF29 (Chicago, IL, USA - June 20-22, 2010), in OGF30 (Brussels, Belgium - October 25-28, 2010) and participated in OGF31 (Taipei, Taiwan - March 21-25, 2011).

The e-Infrastructure Reflection Group was founded to define and recommend best practices for the pan-European electronic infrastructure efforts. The e-IRG produces white papers, roadmaps and recommendations and analyses the future foundations of the European Knowledge Society. EGI-InSPIRE has also been an active participant in a number of e-IRG meetings and workshops such as in Madrid, Spain - June 17-18, 2010 and Brussels, Belgium - October 13-14, 2010 and will also participate in the next workshop (Budapest, Hungary - April 4-5, 2011).

The Infrastructure Policy Group (IPG) is a regular forum of the major worldwide e-Infrastructure projects - encompassing High Performance Computing (HPC) and High Throughput Computing (HTC). In order to align policies within each infrastructure so that the user experience in using different infrastructures is simplified and improved where ever possible. Attendees discuss policy issues that impact interoperation between their infrastructures. The value for EGI.eu is to facilitate a discussion between other DCIs from grid and HPC on policy issues, interaction and interoperation. EGI representatives attended the IPG meeting in June 2010 at OGF 29 in Chicago, a meeting in September in Brussels at OGF30, and another one at OGF31 from March 21-25, 2011 in Taipei, Taiwan.

The EUGridPMA in Europe, and the International Grid Trust Federation (IGTF) at the global level, coordinate a common authentication trust domain that is used to persistently identify all grid participants. EGI.eu is a member of EUGridPMA and through this membership contributes to both organisations. EGI participation has led to a number of new guidelines and policies that address the needs of our increasingly heterogeneous infrastructure. This includes guidance on the way end-users protect security sensitive materials, and infrastructure providers can aid in ensuring this security by managing sensitive material on behalf of the end user. This at the same time promotes ease of use for such end-users by making access less complicated. A new guideline on the operation of attribute authorities (e.g. VO management servers) has been drafted with strong EGI participation and is now being extended to include more diverse access methods to the infrastructure and being scoped to a global audience. Next IGTF meeting will be the All-Hands meeting on March 21-22, 2011 (Taipei). David Kelsey, Chair of EGI.eu SPG, participated in the EUGridPMA meetings on September 20-22, 2010 (Zagreb) and January 24-26, 2011 (Utrecht). At both of these meetings, Kelsey led sessions working on new policy standards for general Attribute Authorities, thereby expanding the work of



IGTF beyond purely identity management to the management of attributes in general (e.g. for authorisation of access to Grid services).

The European e-Infrastructure Forum is a forum for the discussion of principles and practices to create synergies for distributed Infrastructures. The goal of the European e-Infrastructure Forum is the achievement of seamless interoperation of leading e-Infrastructures serving the European Research Area. The focus of the forum is the needs of the user communities that require services that can only be achieved by collaborating Infrastructures. It meets as required to respond to key policy issues relevant to all members. Following its meeting at the EGI TF in September 2010, work has been progressing on following up the interactions with the requirements collected from the ESFRI projects.

Overall, EGI representatives attended the three OGF meetings, three e-IRG meetings, two EUGridPMA meetings, three IPG meetings, four IGTF meetings, one EEF meeting and the Open Grid Forum (CAOPS Working Group) where the foundational documents for the working of the IGTF are defined and developed. Policy guidance with respect to identity management and the trust fabric was disseminated at the EGI Technical Forum and to the EGI Council in its assessment of policy mechanisms to address sensitive use of the EGI infrastructure. More detailed information about EGI external policy activities in IGTF and EUGridPMA are described in MS214 Security Activity in EGI [R17].

4.3 Policy part of EGI.eu website and wiki

The policy section of the EGI website was structured in a way in order to provide an overview of the general policy development activities being undertaken by the EGI.eu policy development team, general description of the policy groups within EGI and the description of EGI.eu's collaboration with external partners.

The policy area was created in order to help the NGIs and EIROs quickly identify the policy development activities and have access to designated contact points, discover the policy documents produced by specific policy groups and obtain a clear overview about external policy actions with project, international policy bodies, external resource providers and new virtual research communities. Thus, the website is organised in two main sections: internal policy activities and collaboration with external partners. The former refers to policies mainly defined by EGI.eu policy groups and PDT [R34]. The latter refer to collaboration and policies involving relationships with external partners [R33].

The Policy wiki pages [R35] have been regularly updated during the course of the EGI-InSPIRE. The wiki pages contain information about PDT activities, dedicated page for every EGI policy group with the mailing list, list of members, information about meetings and minutes of meeting and group's documents. A dedicated wiki page provides a list of all valid EGI policies and procedures that have been regularly updated.

4.4 Strategic Policy Papers

In order for EGI.eu to succeed in the transition from a project-based system to a sustainable pan-European e-Infrastructure and to achieve sustainable provision of services to the European Scientific Community, EGI.eu needs a well-conceived, effective and reliable strategic policy framework. On the one side, EGI.eu policies should provide reliable, long-term and strategic direction, while on the



other side the framework should be flexible enough to adopt and accommodate the dynamic and ever-changing requirements of European scientific communities and industries.

Therefore, strategic policy papers are the direct, strategic link between the EGI.eu mission – to ensure a long-term, sustainable e-Infrastructure available to all European scientists and their international collaborators – and its daily activities in grid operations, software quality, security and user communities. The strategic policy papers summarised below, also feed into EGI-InSPIRE milestones and deliverables helping to shape content and future direction.

4.4.1 ERIC Legal Framework

The European Union launched a major initiative to create a number of European Research Infrastructure Consortia (ERICs). ERIC is a legal framework based on Article 171 of the EC Treaty that is designed to facilitate the joint establishment and operation of research facilities of European interest. As part of EGI's on-going sustainability studies, the PDT, in collaboration with CNRS, has written a milestone about EGI's potential alignment with ERIC [R25].

The milestone describes the potential impact on EGI.eu's sustainability, legal status and governance. It presents potential advantages, disadvantages and unresolved issues to help promote informed discussion within the EGI Council. Some of the advantages comprise greater political visibility through membership in the exclusive ERIC 'club' and increased prospect on achieving sustainability and financial stability. The most sensitive issues that have been identified are potential limitations on the governance and organisation structure of EGI.eu, potential difficulties in delegating the responsibility and potentially complex and lengthy negotiations needed to agree with an ERIC proposal for EGI.eu. A number of open questions were identified to stimulate focused discussion within the EGI Council.

4.4.2 EGI Sustainability Plan

The EGI ecosystem is a complex web of many different actors: EGI.eu, resource infrastructure providers such as National Grid Initiatives (NGIs) and European Intergovernmental Research Organisations (EIROs), technology providers, virtual research communities and public funding bodies. These actors undertake the provision or consumption of human, infrastructure and technical services within the ecosystem. Each of these different services needs to be supported by an appropriate business model.

In order to set out the context for defining the sustainability of the whole ecosystem, an analysis of the various actors and provided services have been performed together with the identification of potential business models to be adopted in the future. An initial matching of services and business models was performed and some recommendations were outlined for activities within EGI-InSPIRE JRA1 regarding accounting tools and billing systems [R26]. The work on the sustainability plan will continue in the coming months.

4.4.3 Clouds and Virtualisation

Virtualisation and cloud computing have demonstrated how new technologies can enable dynamic execution environments or on-demand elastic service deployment with new, clear cost measurements and business models. Due to the financial constraints being felt throughout Europe and ICT policies and services tailored to the current e-Infrastructure user communities that do not always meet the needs of new communities, EGI needs to evolve to provide a more flexible, efficient e-Infrastructure to attract new users from all disciplines.



It is under these contexts that EGI.eu has started to define how to better address on behalf of the EGI collaboration the evolving user needs by exploiting these emerging technologies and develop a vision for the future of the infrastructure through a dedicated report for the integration of clouds and virtualisation into the European production infrastructure [R27]. The report provides a detailed analysis of the technology benefits and issues, economical aspects of delivering the new services, with a short- and long-term view for identifying why, where and how these technologies have a place within the EGI.

4.4.4 EGI Role towards Europe 2020

The report on EGI Role towards Europe 2020 provides an overview of the latest EU strategic developments reflected in the Europe 2020 Strategy and reports created by the EU high-level expert groups on clouds and scientific data relevant to the EGI community [R28]. Furthermore, the report initiates a discussion about how EGI could adapt activities in order to improve its alignment with the new European strategic priorities, as well as a self-assessment as to the expected benefits. Policy and strategic responses are needed at the highest level by the EGI Council to support EGI.eu's efforts in providing a coordinated response across the community, to the EC and other relevant stakeholders to ensure that the EGI not only retains but improves its position as the key stakeholder within Europe and globally. Potentially, this strategic change and focus on research and innovation could drive the European economy with ICT at the forefront of the European "battle" for achieving the Europe 2020 vision.

Thus, the report contains a list of general recommendations for EGI.eu and the EGI community. Some of the key recommendations for EGI.eu are to provide a quarterly report that comprises the latest strategic, policy and legislative activities within the EC, develop a communication and lobbying strategy within Europe, investigate the adoption of Green-IT initiatives within the EGI community, etc. Some of the key recommendations for the NGIs are to improve communication with their national authorities, check the latest development and measures taken by their states related to promotion and implementation of the goals of the Europe 2020 Strategy, clearly communicate to their Member States the ability to use structural funds (now and post 2013) for research & innovation projects etc. One of the conclusions of the report is that in the following years Europe needs the EGI community more than ever as a valuable and reliable partner in a challenge to achieve the vision of Europe 2020.

4.4.5 Standards Roadmap

The PDT has produced a Standards Roadmap [R29], which contains an overview of the relevant standards activities taking place within the EGI, both internally within the operational tools and through external software providers as described in the UMD Roadmap [R30].

The realisation of the EGI vision requires the ability to cross both organisational and technical boundaries through the realisation of interoperability. Reaching interoperability amongst organisations and technologies is a long-term activity, which requires reaching a consensus through compromises and reworking/rebuilding systems or procedures according to them. Interoperability can be addressed at different levels leading to the identification of different interoperability types. In our context, we identify three main types of interoperability: 1) strategic, 2) operational and 3) technical.

For each type of interoperability, proper actions should be taken in order to enable it. At the technical level, there are two main approaches: adapter-based and standards-based interoperability.



This document focuses on standards-based technical interoperability (i.e. the interoperability amongst systems participating in EGI such as computing clusters, storage systems) through the adoption of open standards. By systems, the software abstraction layer (middleware) needed to expose the functional and operational interfaces outside the organisational boundaries together with the security mechanisms needed by the EGI were mainly considered. Standards are open when they have the following four properties [R2]: 1) control: the evolution of the specification should be set in a transparent process open to all interested contributors; 2) completeness: the technical requirements of the solution should be specified completely enough to guarantee full interoperability; 3) compliance: there is a substantial standard-compliant offering promoted by proponents of the standard; 4) cost: fair reasonable and non-discriminatory access is provided to all implementers [R48]. Open standards are mapped into the UMD capabilities. This document represents an evolving roadmap that will be officially updated and published every twelve months, while always being open for contributions [R4].



5 EVENTS

A separate task within EGI-InSPIRE, TNA2.4, provides support and management for the two large community-driven events organised by the collaboration each year: the Technical Forum and the User Forum. The location of each event is selected by the EGI Council following an open bidding process from the NGIs. For each meeting, a dedicated Programme Committee (under a Programme Chair), is drawn from the community, and a Local Organising Committee is set up with members drawn from the EGI project office and the local organisers.

5.1 Organisation

The EGI Technical Forum 2010 was held in Amsterdam at the Beurs van Berlage from 14 to 17 September 2010 in partnership with the BiG Grid project, the Dutch NGI. The EGI Technical Forum 2010 was the first major event within the EGI community and brought together European distributed computing projects and their collaborators in academia and businesses, from around Europe and around the world. In doing so it also provided an ideal venue for the developers, end-users, resource providers and decision makers involved in these projects to meet and discuss the continued transition to a sustainable production grid infrastructure for Europe. The major theme of the meeting, achieved through technical sessions, a demonstration and exhibition area, networking space and events, was to establish collaborations between the new and the current European Distributed Computing Infrastructure projects to meet the needs and requirements of the research community.

More than 570 delegates registered for the EGI Technical Forum, of which 17% were female. The event included 290 contributions in the form of presentations, demos, posters and workshops. A survey requesting feedback on the EGI Technical Forum was also sent to delegates through the Zoomerang survey tool. Around 110 responses were received. The conference website was reported to be very or quite useful by 87% of respondents. Around 70% found the EGI organising team helpful (22% did not interact with the team). During the event, 86% found the onsite conference staff helpful. Around 90% used the online programme, and 71% the short version of the printed programme. Around 22% reported using the iPhone application, with 28% using Twitter, 10% Flickr, 25% YouTube, 8% the GLOBAL webcast of the plenaries and 28% read the GridCast blog.

The EGI User Forum is organised by EGI.eu, Vilnius University and LITNET in Vilnius, Lithuania, 11-14 April 2011, with the support of the EGI-InSPIRE and European Middleware Initiative (EMI) projects and local secretariat BAIP. The conference takes place at the Radisson Blu Lietuva in Vilnius, Lithuania and showcases the diversity of the user community within the European Grid Infrastructure through daily plenaries, oral presentations, poster sessions and co-located workshops. The event aims to help all members of the EGI community, from end-users to application developers, operations staff and technology providers, to share their knowledge and build collaborations. The programme also includes numerous networking and social events and opportunities to 'meet the experts'.

5.2 Dissemination

Two dissemination sessions were run during the EGI Technical Forum, one targeted specifically at NGIs, and a general session on reaching out to the media, which included a presentation from Martin Ince of the Times Higher Educational Supplement. Two press releases were issued - a media invitation to a press conference sent a week before the event, and a press release issued on Wednesday 15, plus a press pack containing images and support materials. "EGI Inspire brings together European e-Infrastructure community" was issued to 3,870 journalists through the



AlphaGalileo press service and was also published on the Cordis news wire, the EGI website and sent to the media contacts list and the dissemination mailing list. A press release announcing the funding for EGI-InSPIRE was also issued by the EC Press Office on 15th and together this led to 27 press cuttings during the quarter, including articles in HPCwire, iSGTW, ZDNet, Yahoo News, ITnews in Australia, Science Business and Environment & Energy Management.

The local Dutch media were targeted in partnership with BiGGrid, the event hosts, and a press conference invitation was issued. Local journalists were unable to attend on the date of the press conference, but interviews were held with Web Wereld and Tweakers.net separately. The dissemination team also promoted the Flickr and Twitter feeds at the event, setting up an event hashtag (#egi2010) – effectively a pre-agreed label for any user generated content - to enable delegates to share their photos and blogs with the rest of the community. Around 50 Twitter posts were generated and 70 photos were uploaded to Flickr¹³. An iPhone app was available to download, featuring a full programme, the option to select favourite sessions and a link to the social media channels. This was downloaded by 39 people before the event and 54 during it. TNA2.2 worked with the GridCast team from e-ScienceTalk to run an event blog, and contributed bloggers from the dissemination team, leading to 26 posts on the blog and 6 videos on YouTube. EGI also ran a booth at the event, distributing materials and showing the new BELIEF video about EGI.

Since the Technical Forum, the dissemination team has focused on preparations for the EGI User Forum in Vilnius, 11-15 April. This has included participation in the Programme and Organising Committees, as well as working on an outreach plan for the meeting and advertising the event itself through our media channels. Content was also developed for the conference website at <http://uf2011.egi.eu/> and the site has been regularly updated. The dissemination team also worked with the Organising Committee and the local organisers to produce the sponsor and exhibition guides.

5.3 Policy

During the EGI Technical Forum 2010, the PDT participated in a number of meetings, including sessions organised by several EGI.eu policy groups (e.g. SPG, OMB). In these meetings, the PDT had presentations explaining the PDT responsibilities, the PDP and overall policy activities.

The PDT has also focused on preparations for the EGI User Forum in Vilnius to be held April 11-14, 2011, which includes a dedicated PDT session. In order to run a productive and informative session, a survey form was sent to NGI policy contacts for completion concerning specific NGI policy-related information. The provided information will be essential for producing a short analysis introduction and generating a set of questions to shape key topics and stimulate discussion. This policy session is focused on providing an overview of the overall achievements of the EGI policy activities performed at both national and international levels, consolidating a common view on the way forward and reinforcing relationships among the representatives of EGI participants on policy matters. The goal of this session is to understand operation and legal structures and cost models, start an information exchange and identify relevant metrics through a focused roundtable discussion. The target audience is policy makers from EGI participants (e.g., NGIs, EIROs), external partners and anyone with genuine interest in policy matters for e-Infrastructures. The PDT will also participate at the User Forum on a number of different sessions and support several EGI.eu policy groups' meetings.

¹³ http://www.flickr.com/photos/european_grid_initiative/4989727910/



6 CONCLUSION AND FUTURE PLANS

In the area of dissemination, good progress has been made in establishing new branding and channels of communication for EGI and EGI-InSPIRE. The Dissemination team has also made some progress in making contact with the wider dissemination team based in the NGIs but engagement could be improved. Having established some individual external contacts, the dissemination team needs to build on the dissemination networks across Europe within the NGIs. The team will also aim to use this network to improve knowledge and awareness in the wider press, beyond specialist journals. In future versions of the Dissemination Plan and the Dissemination Handbook, the dissemination activities will be to assess how best to build on the channels and contacts already established. This will help to improve outreach to new user communities, which will also be significantly supported by the two major events each year, the Technical Forum and the User Forum. Plans are already underway for the second EGI Technical Forum in Lyon in September 2011.

To conclude, transition from EGEE to EGI policy framework was successfully completed and as a direct consequence of this the new EGI policy framework has improved coordination between the various policy groups. Furthermore, collaboration with different categories of external partners was improved and intensified, whereby EGI representatives took a leading role in a number of initiatives and actions including developing new policy standards, policies and guidance. Policy development process is established on the solid ground which will enable in the following years to provide clearness, fairness, consistency and efficiency at every stage of policy development process, clarify the responsibilities of participants, encourage proactive consideration of key policy issues within EGI community and prevent potential issues and conflicts between actors. EGI will form ERIC working group in order investigate open questions raised by the milestone dealing with ERIC [R] Following this, based on the newest EC strategic and policy developments, PDT will be working in the following months on providing a quarterly report (analysing the latest EC strategic, policy and legislative activities relevant to EGI), develop a Communication and Lobbying Strategy within Europe, participate at the stakeholder debate on the progress at the annual Digital Assembly, investigate the adoption of Green-IT initiatives within the EGI community etc.

The Sustainability Plan has provided a preliminary assessment identifying which services could be supported by a particular business model as a means to structure and direct future discussions and dedicated activities with JRA1. This will take place through consultative workshops amongst the stakeholders in the years to come to assess the true viability of the different services to different business models using this taxonomy. In addition, based on the analysis and the context set out by D2.6 - Integration of Clouds and Virtualisation into the European production infrastructure, a dedicated workshop will be organised by late spring 2011 to gather feedback towards a federated virtualised infrastructure [R31]. Through the direct engagement with the EGI community over the next few months, EGI.eu will strive to ensure that available opportunities will be thoroughly evaluated and solutions deployed that answer the growing need for virtualised resources as well as to ensure the infrastructure continues to evolve towards the current and new user communities it serves.

7 REFERENCES

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R 2	D1.1 Quality Plan and Metrics https://documents.egi.eu/document/55
R 3	MS207 Review of the website https://documents.egi.eu/document/179
R 4	Policy part of EGI website http://www.egi.eu/policy
R 5	Policy Development Process (PDP) https://documents.egi.eu/document/169
R 6	Technology Coordination Board (TCB) https://documents.egi.eu/document/109
R 7	Operations Management Board (OMB) https://documents.egi.eu/document/117
R 8	Operational Tools Advisory Group (OTAG) https://documents.egi.eu/document/103
R 9	Operations Automation Team (OAT) https://documents.egi.eu/document/123
R 10	User Community Board (UCB) https://documents.egi.eu/document/120
R 11	User Services Advisory Group (USAG) https://documents.egi.eu/document/121
R 12	Security Policy Group (SPG) https://documents.egi.eu/document/64
R 13	Software Vulnerability Group (SVG) https://documents.egi.eu/document/108
R 15	Security Coordination Group (SCG) https://documents.egi.eu/document/119
R 16	EGI Computer Security and Incident Response Team (EGI CSIRT) https://documents.egi.eu/document/385
R 17	MS214 Security Activity within EGI https://documents.egi.eu/document/307
R 18	MS108 Global Task Review https://documents.egi.eu/document/314
R 19	MS109 NGI International Task Review https://documents.egi.eu/document/315
R 20	TCB wiki page https://wiki.egi.eu/wiki/TCB
R 21	D3.2 Annual Report on the status of EGI's User Services and Community Coordination https://documents.egi.eu/document/386
R 22	RT for Policy Development Process http://go.egi.eu/pdp-queue
R 23	Glossary Coordination Group (GCG) wiki page https://wiki.egi.eu/wiki/GCG
R 24	Memorandum of Understanding (MoU) template https://documents.egi.eu/document/87
R 25	MS212 Alignment of EGI.eu with the ERIC organisational model https://documents.egi.eu/document/244
R 26	D2.7 EGI Sustainability Plan https://documents.egi.eu/document/313
R 27	D2.6 Integration of Clouds and Virtualisation into the European production infrastructure https://documents.egi.eu/document/258
R 28	EGI Role towards Europe 2020 https://documents.egi.eu/document/317
R 29	D2.5 Standards Roadmap https://documents.egi.eu/document/206
R 30	D5.1 UMD Roadmap https://documents.egi.eu/document/100
R 31	EGI Workshop: Defining a roadmap for a federated virtualised Infrastructure http://go.egi.eu/jngxd
R 32	DCI Collaborative Roadmap https://documents.egi.eu/document/172
R 33	EGI Collaboration Page http://www.egi.eu/collaboration/



R 34	EGI Policy Page http://www.egi.eu/policy
R 35	EGI Policy Wiki pages https://wiki.egi.eu/wiki/TNA2.3_Policy_Development
R 36	Initiative for Globus in Europe http://www.ige-project.eu/
R 37	European Middleware Initiative http://www.eu-emi.eu/
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R 39	Venus-C http://www.venus-c.eu
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R 42	e-Infrastructure Reflection Group (e-IRG) http://www.e-irg.eu/
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R 44	Infrastructure Policy Group (IPG) http://forge.gridforum.org/sf/wiki/do/viewPage/projects.ipg/wiki/HomePage
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R 46	The International Grid Trust Federation (IGTF) http://www.igtf.net/
R 47	List of EGI policies and procedures https://wiki.egi.eu/wiki/PDT:PDT:Policies_and_procedures
R 48	EICTA White Paper on Standardisation and Interoperability - http://www.eicta.org/fileadmin/user_upload/document/document1166544474.pdf