



**Memorandum of Understanding
between
EGI.eu and StratusLab**



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BACKGROUND

The Stichting European Grid Initiative Foundation (hereafter referred to as “EGI.eu”) has been created under the Dutch law with the mission to create and maintain a pan-European Grid Infrastructure in collaboration with its Participants, i.e. the National Grid Initiatives (NGIs), and Associated Participants (e.g. European International Research Organisations - EIROs) in order to guarantee the long-term availability of a generic e-infrastructure for all European research communities and their international collaborators. In its role of coordinating grid activities between European NGIs EGI.eu will: 1) operate a secure integrated production grid infrastructure that seamlessly federates resources from providers around Europe; 2) coordinate the support of the research communities using the European infrastructure coordinated by EGI.eu; 3) work with software providers within Europe and worldwide to provide high-quality innovative software solutions that deliver the capability required by our user communities; 4) ensure the development of EGI.eu through the coordination and participation in collaborative research projects that bring innovation to European Distributed Computing Infrastructures (DCIs). A summary of EGI.eu is attached as Annex 1.

The StratusLab project (hereafter referred to as “StratusLab”) is a research, development and integration project with the aim of enhancing grid infrastructures with virtualization and cloud technologies. The project is partially funded by the European Union Seventh Framework Programme (FP7) under the Capacities programme Research Infrastructure theme as a combined Collaborative Project / Coordination and Support Activity. StratusLab will integrate, distribute and maintain a sustainable open-source cloud distribution to bring cloud to existing and new grid sites; and develop components to coordinate deployment of virtual machines, and to manage repositories of virtual appliances. A summary of StratusLab is attached as Annex 2.

StratusLab has six partners in France (CNRS), Spain (UCM, TID), Greece (GRNET), Switzerland (SixSq Sàrl), and Ireland (TCD).

ARTICLE 1: PURPOSE

The purpose of this Memorandum of Understanding (MoU) is to define a framework of collaboration between EGI.eu and StratusLab (hereafter also referred to as “the Party” or the “Parties”). The Parties recognise, by this MoU, the opening of a wider and longer-term cooperation in activities which will bring visible benefits.

ARTICLE 2: JOINT WORK PLAN

The parties contribute to enable the vision of providing European scientists and international collaboration for sustainable distributed computing services to support their work.



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The specific activities to be carried out in the framework of the collaboration are¹:

A.1 Workshops and Technical Meetings

Parties Involved: EGI.eu (Michel Drescher), StratusLab (Charles Loomis)

Description of work: Organise workshops and technical meetings to coordinate adoption of cloud computing in Distributed Computing Infrastructures.

Expected outcome:

- M1.1-4: Technical meetings at both stand-alone and EGI and StratusLab events

A.2 Training

Parties Involved: EGI.eu (Steve Brewer, Gergely Sipos), StratusLab (Charles Loomis)

Description of work: develop complementary training strategy focusing on cloud middleware installation, configuration and usage by resource providers to support their end users.

Expected outcome:

- M2.1-3: Training sessions at EGI and StratusLab events, with StratusLab providing training for EGI.eu and NGI trainers as required
- EGI.eu- and NGI-run training sessions on StratusLab for users / administrators

A.3 Dissemination

Parties Involved: EGI.eu (Catherine Gater), StratusLab (Kathryn Cassidy)

Description of work: disseminate the progress and final results of the collaboration within EGI and StratusLab communities.

Expected outcome:

- M3.1: Advertise the start of the collaboration in each party website with a dedicated static page and news article
- M3.2: Joint technical sessions at EGI and StratusLab community events disseminating the progress and results of the collaboration

A.4 Standards

Parties Involved: EGI.eu (Sergio Andreozzi, Michel Drescher), StratusLab (David O'Callaghan)

Description of work: contribute, steer and advance high-priority standards as identified in the EGI Standards Roadmap (Deliverables D2.5/12/19/24) and in the StratusLab Plans for Standardization Activities (Deliverable D3.1/2).

Expected outcome:

- M4.1: Define a prioritised list of standards relevant to both projects and a roadmap for their adoption within EGI-InSPIRE and StratusLab. Updated annually for inclusion in EGI-InSPIRE Standards Roadmap and StratusLab Plans for Standardization Activities
- M4.2: Description of software components supporting standards based interfaces to be released by StratusLab
- M4.3: Deployment into production of standards based software at EGI.eu sites

¹ Party leading the activity is underlined.



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A.5 Sustainability Models

Parties Involved: EGI.eu (Sergio Andreozzi), StratusLab (Marc-Elian Begin)

Description of work: in work supported by EGI-InSPIRE explore how EGI.eu through its participants (NGIs and EIROS) can help sustain the middleware provided by StratusLab that it may rely on. This may include developing a joint strategy for engaging business partners, having a better understanding as to who uses the current middleware technology.

Expected outcome:

- M5.1: Explore joint sustainability strategies for the StratusLab middleware and EGI. Updated annually for inclusion in the deliverables related to EGI-InSPIRE and StratusLab Sustainability Plans

A.6 User and operation-centric Middleware

Parties Involved: EGI.eu (Michel Drescher); StratusLab (Charles Loomis)

Description of work: evolve middleware components based on requirements gathered through EGI-InSPIRE and StratusLab within the various scientific communities within EGI and expressed through the EGI Technology and UMD Roadmaps; with a particular focus on expanding the EGI accounting to include the full range of items that are relevant for operating an Infrastructure-as-a-Service cloud: CPU, wall-clock time, storage, inbound/outbound bandwidth, IP addresses, etc.

Expected outcome:

- M6.1: Establish an agreement for the delivery of StratusLab software for inclusion in UMD to the specified requirements (i.e. functional, non-functional, quality, etc.) for test deployment
- M6.2: Input from StratusLab to the regular revisions of the UMD Roadmap
- M6.3: Participation of StratusLab into regular requirements gathering activities undertaken by EGI which will be reported to the TCB

A.7 Operational Support

Parties Involved: EGI.eu (Tiziana Ferrari), StratusLab (Vangelis Floros)

Description of work: agree support for test deployments of StratusLab.

Expected outcome: test deployments of StratusLab; third-level user support for incidents and requests

- M7.1: Establish a GGUS support team to support sites running StratusLab
- M7.2: Identify a suitable partner (e.g. EGI.eu or NGI) to take over operations of the StratusLab virtual appliance Marketplace beyond the end of the StratusLab project

ARTICLE 3: TIMELINE AND REPORTING

The EGI.eu Policy Development Team (PDT) will coordinate the periodic review of the progress of the activities defined in Article 2 (Joint Work Plan), follow-up the milestones defined below and distribute reports to both Parties. Special meetings between the points of contact designated under Article 4 (Communication) shall be held, as often as necessary, to examine the progress in the implementing of this Agreement.



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Date	Ref.	Additional Information
04/2011	M3.1	Joint dissemination sessions at EGI and StratusLab community events
04/2011	M2.1	User Training session at EGI User Forum 2011
04/2011	M1.1	Technical meeting on grid-cloud integration at EGI UF 2011
05/2011	M1.2	Technical meeting at EGI User Virtualisation workshop
05/2011	M6.1	Establish an agreement for the delivery of StratusLab software for inclusion in UMD to the specified requirements (i.e. functional, non-functional, quality, etc.) for test deployment (requires a report led by Michel Drescher, EGI.eu)
05/2011	M7.1	Establish a GGUS support team to support sites running StratusLab
06/2011	M4.1	Definition of a prioritized list of relevant standards to both parties and adoption roadmap (requires a report led by Sergio Andreozzi, EGI.eu)
06/2011	M4.2	Description of software components supporting standards-based interfaces to be released by StratusLab (requires a report led by David O'Callaghan)
06/2011	M6.2	Inputs to the UMD Roadmap for the EGI-InSPIRE deliverable due in Jul 2011 (report led by Charles Loomis, StratusLab)
08/2011	M4.3	Deployment of standards-based software at EGI.eu sites
09/2011	M1.3	Technical meeting on grid-cloud integration at EGI TF 2011
09/2011	M5.1	Explore joint sustainability strategies for the StratusLab middleware and EGI (requires a report led by Sergio Andreozzi, EGI.eu)
09/2011	M2.2	Trainer training session at EGI TF 2011
11/2011	M3.2	Requires a report on dissemination activities (report led by Catherine Gater, EGI.eu)
12/2011	M6.3	Inputs to the UMD Roadmap for the EGI-InSPIRE deliverable due in Jan 2012 (report led by Charles Loomis, StratusLab)
Spring 2012	M2.3	User Training session at EGI User Forum 2011
Spring 2011	M1.4	Technical meeting on grid-cloud integration at EGI UF 2012
04/2012	M7.2	EGI takes over the operations of the StratusLab virtual appliance Marketplace beyond the end of the StratusLab project via a suitable partner (requires a report led by Tiziana Ferrari, EGI.eu)



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ARTICLE 4: COMMUNICATION

The Parties shall keep each other informed on all their respective activities and on their progress and shall consult regularly on areas offering potential for cooperation.

Joint working groups may be established to examine in detail proposals in areas assigned to them by the Parties referred to in Article 2 (Joint Work Plan) and to make recommendations to the Parties.

Each Party shall designate a “point of contact” that shall be responsible for monitoring the implementation of this MoU and for taking measures to assist in the further development of cooperative activities. Such points of contact shall be the ordinary channel for the Parties' communication of proposals for cooperation.

The primary point of contact for each Party is:

EGI.eu: Sergio Andreozzi (sergio.andreozzi@egi.eu)

StratusLab: David O’Callaghan (david.ocallaghan@cs.tcd.ie)

Questions of principle or problems that cannot be solved at primary contact level are escalated to the EGI.eu Director and the StratusLab Project Director.

ARTICLE 5: PARTICIPATION IN EGI GROUPS

StratusLab agrees to name a technical representative (with deputy) for the EGI Technical Coordination Board (TCB): Charles Loomis (Ruben Montero).

StratusLab agrees to name a technical representative (with deputy) for the EGI Security Coordination Group (SCG): David O’Callaghan (Charles Loomis).

StratusLab agrees to regularly attend the meetings of EGI TCB and SCG as observer. StratusLab will become a voting member in both groups after signing the SLA.

ARTICLE 6: RIGHTS AND RESPONSIBILITIES

The procedure is set out in Annex 3.

ARTICLE 7: FUNDING

Each Party shall bear the costs of discharging its respective responsibilities under this MoU, including travel and subsistence of its own personnel and transportation of goods and equipment and associated documentation, unless otherwise agreed in this MoU.

Each Party shall make available free of charge to the other Party any office/meeting space needed for the joint activities.

The Parties' obligations hereunder are subject to their respective funding procedures and the availability of appropriated funds. Should either Party encounter budgetary problems in the course of its respective internal procedures that may affect the activities carried out under this MoU, that Party shall notify and consult with the other Party in a timely manner in order to minimise the negative impact of such problems on the cooperation. The Parties shall jointly look for mutually agreeable solutions.



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In order to reduce the impact on travel costs, face-to-face meetings should be co-located with other events where participants are likely to attend. Meeting via teleconferences should be considered when the nature of the discussion does not strictly require a face-to-face presence.

ARTICLE 8: ENTRY INTO FORCE, DURATION AND TERMINATION

This MoU will enter into force when signed and shall remain in force until completion of the activities identified in Article 2 (Joint Work Plan), or upon termination of the projects in which the Parties participate, or upon three (3) months prior written notice by one Party to the other. In the event of termination, the parties shall endeavour to reach agreement on terms and conditions to minimise negative impacts on the other Party. In the event of the continuation of the present cooperation, the Agreement may be extended and/or amended by mutual agreement in writing.

ARTICLE 9: AMENDMENTS

The MoU may be amended by written agreement of the Parties. Amendments shall be valid only if signed by the authorized representatives of the Parties.

ARTICLE 10: ANNEXES

Annexes 1, 2, 3 and 4 attached hereto have the same validity as this MoU and together constitute the entire understanding and rights and obligations covering the cooperation accepted by the Parties under this MoU. Annexes may be amended following the provisions of Article 9 (Amendments).

ARTICLE 11: LANGUAGE

The language for this MoU, its interpretation and all cooperative activities foreseen for its implementation, is English.

ARTICLE 12: GOVERNING LAW - DISPUTE RESOLUTION

The terms of this MoU shall be interpreted in accordance with their true meaning and effect independently of national and local law. Provided that if and insofar as this MoU does not stipulate, or any of its terms are ambiguous or unclear reference shall be made to the substantive laws of Belgium. Disputes shall be resolved by amicable settlement or failing which by arbitration in accordance with the procedure set out in Annex 4.



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IN WITNESS WHEREOF, the Parties have caused their duly authorised representatives to sign two originals of this Memorandum of Understanding, in the English language.

The following agree to the terms and conditions of this MoU:

A handwritten signature in black ink, appearing to read 'Steve Newhouse', written over a horizontal line.

Dr. Steven Newhouse
EGI.eu Director

A handwritten signature in black ink, appearing to read 'Charles Loomis', written over a horizontal line.

Dr. Charles Loomis
StratusLab Project Director

11th April 2011
Date

11/04/2011
Date



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Annex 1 EGI.eu Description

To support science and innovation, a lasting operational model for e-Infrastructure is needed – both for coordinating the infrastructure and for delivering integrated services that cross national borders. The objective of EGI.eu (a foundation established under Dutch law) is to create and maintain a pan-European Grid Infrastructure in collaboration with National Grid Initiatives (NGIs) and European Intergovernmental Research Organisations (EIROs) in order to guarantee the long-term availability of a generic e-infrastructure for all European research communities and their international collaborators.

In its role of coordinating grid activities between European NGIs, EGI.eu will:

- Operate a secure integrated production grid infrastructure that seamlessly federates resources from providers around Europe
- Coordinate the support of the research communities using the European infrastructure coordinated by EGI.eu
- Work with software providers within Europe and worldwide to provide high-quality innovative software solutions that deliver the capability required by our user communities
- Ensure the development of EGI.eu through the coordination and participation in collaborative research projects that bring innovation to European Distributed Computing Infrastructures (DCIs)

The EGI.eu is supporting ‘grids’ of high-performance computing (HPC) and high-throughput computing (HTC) resources. EGI.eu will also be ideally placed to integrate new Distributed Computing Infrastructures (DCIs) such as clouds, supercomputing networks and desktop grids, to benefit the user communities within the European Research Area.

EGI will collect user requirements and provide support for the current and emerging user communities. 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 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, 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 – structured international user communities – that are grouped into specific research domains. VRCs are formally represented within EGI at both a technical and strategic level.



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Annex 2 StratusLab Description

StratusLab is a research, development and integration project with the aim of enhancing grid infrastructures with virtualization and cloud technologies. The project is partially funded by the European Union Seventh Framework Programme (FP7) under the Capacities programme Research Infrastructure theme as a combined Collaborative Project / Coordination and Support Activity. StratusLab will integrate, distribute and maintain a sustainable open-source cloud distribution to bring cloud to existing and new grid sites; and develop components to coordinate deployment of virtual machines, and to manage repositories of virtual appliances.

StratusLab brings several benefits to the e-Infrastructure ecosystem, in terms of simplification, added flexibility, increased maintainability, quality, energy efficiency and resilience of the sites. The new StratusLab Toolkit cloud distribution complements existing grid middleware services: the aim is for the cloud layer to be fully transparent to layers above. Existing grid middleware continues to provide the glue to federate the distributed resources and the services for high-level job and data management. StratusLab will help to improve the usability of distributed computing infrastructures, to attract scientific user communities, to appeal equally to industrial users, to keep European research infrastructures at the technological forefront, and to strengthen the know-how in virtualization and cloud computing of European industry.

StratusLab is a two-phase project. In the **first phase**, the project is focused on **cloud computing for resource provisioning in grid sites**. This entails development and integration of the initial StratusLab cloud platform, incorporating the components required for the virtualization of grid sites; and creation of virtual appliances for the scientific application domains in the project.

In the **second phase** the emphasis will shift towards developing **new cloud-like delivery paradigms in grid sites**. This will build on the first phase, including new IaaS cloud interfaces and support for creation of new virtual appliances, which will be stored in a repository and made accessible through a Marketplace. Efforts to achieve both goals started from the beginning of the project.

StratusLab brings together six partners from five European countries. The lead partner is the Centre National de la Recherche Scientifique (CNRS, France). The other partners are the Universidad Complutense de Madrid (UCM, Spain), the Greek Research And Technology Network S.A. (GRNET, Greece), SixSq Sàrl (Switzerland), Telefonica Investigacion y Desarrollo S.A. (TID, Spain), and Trinity College Dublin (TCD, Ireland). The partners of the consortium are key players with recognized leadership, proven expertise, experience and skills in grid computing, cloud computing and virtualization. The aggregation of the individual consortium partners presents a balanced combination of academic, research and industrial institutes with complementary capabilities.

Contract number: RI-261552

Project type: CP-CSA

Start date: 01/06/2010

Duration: 24 months

Total budget: 3 317 657 €

Funding from the EC: 2 300 000 €

Total funded effort in person-month: 340



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Annex 3 Rights and Responsibilities

A. GENERAL

1. StratusLab agrees to adhere to applicable policies and procedures relating to the use of the production infrastructure.
2. A Party which makes material, equipment or components available to the other Party, for the purposes of activities under this MoU shall remain the proprietor of such material, equipment or components.
3. Each Party shall remain fully responsible for its own activities, including the fulfilment of its obligations under any grant agreement with the European Commission or under any consortium agreement related thereto.

B. PERSONNEL

1. Each Party shall be solely responsible for any personnel hired to carry out work under this MoU.
2. In case personnel employed by one Party temporarily carries out work under this MoU on the premises of another (hereafter referred to as "secondment"), the following provisions shall apply:
 - (a) The persons seconded shall be subject to all regulations, including, in particular, safety regulations, applicable on the site of the Party they are seconded to.
 - (b) The personnel seconded by a Party to another shall remain employees of the Party having seconded them and such Party, as employer, shall bear exclusive responsibility for the payment of salary and for the procurement of adequate social security and insurance, including third party liability insurance and health insurance.
 - (c) Unless otherwise agreed by the Parties concerned, Intellectual Property Rights generated by personnel seconded by a Party to another shall be owned by the Party having seconded such personnel.

C. INTELLECTUAL PROPERTY RIGHTS AND LICENSE

1. "Intellectual Property Rights" shall mean all intellectual creations including but not limited to inventions, know-how, layouts, drawings, designs, specifications, computer programs, reports, processes, protocols, calculations and any other matter and protected by intellectual property rights, whether registered or not, including patents, registered designs, copyrights, design rights and all similar proprietary rights and applications for protection thereof.
2. Intellectual property rights generated by a Party under this MoU shall be the property of that Party who shall be free to protect, transfer and use such Intellectual Property Rights as it deems fit.
3. Notwithstanding the foregoing each Party shall grant the other a non-exclusive royalty free, perpetual license to use the Intellectual Property Rights generated by it under this MoU for use within its project or for the exploitation the results thereof. Such license shall include the right to sublicense the entities involved in the project. This license does not necessarily apply to modifications / revisions that take place outside the scope of this MoU.

D. JOINTLY OWNED RESULTS

1. Results that were jointly generated by both Parties will be jointly owned by the Parties, hereinafter referred to as ("Jointly Owned Results") and each of the Parties shall be free to use these Jointly Owned Results as it sees fit without owing the other Party any compensation or requiring the consent of the other Party. Each Party, therefore, for example and without limitation, has the transferable right to grant non-exclusive, further transferable licenses under such Jointly Owned Results to third parties. Each Party shall be entitled to disclose such Jointly Owned Results without restrictions unless such Jointly Owned Results contain a Joint Invention in which case no disclosure must be made prior to the filing of a priority application.



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2. With respect to any joint invention resulting from this MoU (i.e. any invention jointly made by employees of both Parties), the features of which cannot be separately applied for as Intellectual Property Rights and which are eligible for statutory protection requiring an application or registration (herein referred to as “Joint Invention”), the Parties shall agree on which Party will carry out any filing as well as any further details with regard to persecuting and maintaining of relevant patent applications.

E. PUBLIC RELATIONS

1. Any publication by a Party resulting from the activities carried out under this MoU shall be subject to prior agreement of the other Party not be unreasonably withheld.

2. EGI.eu and StratusLab may each release information to the public, provided it is related only to its own part of the activities under this MoU. In cases where the activities of the other Party are concerned prior consultation shall be sought. In all relevant public relations activities, the contribution of each Party related to activities covered by this MoU shall be duly acknowledged.

F. CONFIDENTIALITY OF INFORMATION

1. The Parties may disclose to each other information that the disclosing Party deems confidential and which is (i) in writing and marked “confidential”, or (ii) disclosed orally, and identified as confidential when disclosed, and reduced in writing and marked “confidential” within fifteen (15) days of the oral disclosure (hereafter referred to as “Confidential Information”). Confidential Information shall be held in confidence and shall not be disclosed by the receiving Party to any third party without the prior written consent of the disclosing Party.

2. Notwithstanding the foregoing a Party is entitled to disclose Confidential Information which it is required by law to disclose or which, in a lawful manner, it has obtained from a third party without any obligation of confidentiality, or which it has developed independently from any Confidential Information received under this MoU, or which has become public knowledge other than as a result of a breach on its part of these confidentiality provisions.

G. LIABILITY

1. Each Party shall use reasonable endeavours to ensure the accuracy of any information or materials it supplies to the other Party and of any other contribution it makes hereunder and promptly to correct any error therein of which it is notified. The supplying Party shall be under no obligation or liability other than as stated above and no warranty or representation of any kind is made, given or to be implied as to the sufficiency, accuracy or fitness for a particular purpose of such information, materials or other contribution or as to the absence of any infringement of any proprietary rights of third parties through the possession or use of such information, materials or other contribution. The recipient Party shall be entirely responsible for its use of such information, materials or other contribution and shall hold the other Party free and harmless and indemnify it for any loss or damage with regard thereto.

2. Except in case of gross negligence or wilful misconduct, neither Party shall be liable for any indirect or consequential damages of the other Party, including loss of profit or interest, under any legal cause whatsoever and on account of whatsoever reason.

H. PARTICIPATION IN SIMILAR ACTIVITIES

1. Parties are not prevented by this MoU from participating and activities similar to those described in this document with third parties. There is no obligation to disclose any similar activity to the other party. However, when considered of mutual benefit, both parties are encouraged to involve the other party in similar activities to the goal of disseminating the knowledge about StratusLab and EGI.eu.



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Annex 4 Settlement of Disputes

1. All disputes or differences arising in connection with this MoU which cannot be settled amicably shall be finally settled by arbitration in accordance with the procedure specified below which shall be adapted in the light of the number of Parties involved.
2. Within thirty (30) calendar days of written notification by a Party to the other Party of its intention to resort to arbitration, the first Party shall appoint an arbitrator. The second Party shall appoint an arbitrator within three (3) months of the appointment of the first arbitrator. The two arbitrators shall, by joint agreement and within ninety (90) calendar days of the appointment of the second arbitrator, appoint a third arbitrator, who shall be the Chairman of the Arbitration Committee.
3. If the second Party fails to appoint an arbitrator or the two arbitrators fail to agree on the selection of a third arbitrator, the second or, as the case may be, the third arbitrator, shall be appointed by the President of the Court of Justice of the European Communities.
4. Unless otherwise agreed by the Parties concerned within thirty (30) calendar days of the provision of notice referred to in Article 12 above, the arbitration proceedings shall take place in Brussels and shall be conducted in English. The Parties shall within one month of the appointment of the third arbitrator agree on the terms of reference of the Arbitration Committee, including the procedure to be followed.
5. The Arbitration Committee shall faithfully apply the terms of this MoU. The Arbitration Committee shall set out in the award the detailed grounds for its decision.
6. The award shall be final and binding upon the Parties, who hereby expressly agree to renounce any form of appeal or revision.
7. The costs including all reasonable fees expended by the Parties to any arbitration hereunder shall be apportioned by the Arbitration Committee between these Parties.