



Memorandum of Understanding between EGI.eu and gSLM



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between EGI.eu and gSLM**



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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 gSLM project (hereafter referred to as “gSLM”) is a two-year project funded by the European Commission Seventh Framework Programme in order to improve service level management in Grid infrastructures. It follows from a weakness identified in current grid infrastructures, where Service Level Management has tended to codify existing best effort service levels rather than the more formal process seen in the commercial sector. gSLM brings expertise from commercial service level management specialists as well as grid operations, policy and dissemination experts together to work on new models for grid service. The project gathers input through workshops and consultation with experts and other projects, and will produce roadmaps and white papers with suggested new approaches to delivering and managing grid services. A summary of gSLM is attached as Annex 2.

The partners in gSLM that are represented in the EGI Council are:

- directly: CYFRONET (Polish NGI)
- indirectly through their NGIs: Universiteit van Amsterdam (NGI Netherlands), Universitat Politècnica de Catalunya (NGI Spain), Ludwig-Maximilians-Universität München (NGI Germany)

ARTICLE 1: PURPOSE

The purpose of this Memorandum of Understanding (MoU) is to define a framework of collaboration between EGI.eu and gSLM (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. In this broad context, the specific goals of the collaborations are:

1. to explore the alignment of Service Level Management (SLM) within EGI to the best practice adopted in the IT industry (e.g., ITIL) including relationships with customers (VOs, users) and relationships with providers (Resource Infrastructure Providers, Technology Providers)
2. to analyse the current EGI service delivery in the light of best practices such as ITIL, ISO/IEC 20000 and CMMI.

3. to consult NGIs on the implementation of SLM
4. to provide training and tutorials at EGI events on IT Service Management
5. to connect the EGI community with the ITSM community
6. to disseminate the results of this collaboration within the remit of each project's dissemination and communication activities such as joint events

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

A.1 Alignment of EGI Service Level Management to IT SM best practices

Parties Involved: EGI.eu (Sergio Andreozzi); gSLM (Thomas Schaaf)

Description of work: The goal of this activity is to analyse EGI service delivery in the light of best practices such as ITIL, ISO/IEC 20000 and CMMI.; EGI should provide early feedback on the gSLM white papers and answers to surveys issued by gSLM; gSLM will propose a model for improving SLM in EGI, including: decomposition of EGI into services in line with ITIL best practices and reviews of SLA and OLA templates currently in use.

Expected outcome:

- M1.1: Status of SLM and its implementation in EGI
- M1.2: Early-feedback on gSLM final roadmap
- M1.3: gSLM final roadmap

A.2 Operational Aspects of Service Level Management

Parties Involved: EGI.eu (Tiziana Ferrari), gSLM (WP5, Tomasz Szeplieniec)

Description of work:

This activity aims at establishing communication with teams on the NGI and EGI levels responsible for infrastructure operation. The current practices of service delivery in EGI are an important source of requirements for future SLM models and roadmaps. The initial steps will include aligning terms used in the EGI operational model with SLM vocabulary. Summary of current SLM status, as well as requirements for future development, will be collected in form of a survey prepared by gSLM - aimed at sites and NGIs. Input collected in this way will influence the final recommendations that gSLM is going to provide. Based on a requirements catalogue, gSLM will provide an analysis of operational readiness of EGI services for possible introduction of SLM. Better understanding their status in introducing SLM will result for EGI in an increase of the infrastructure's maturity. The additional goal of this activity is to identify Resource Infrastructure Providers implementing elements of SLM on the NGI level – for this purpose EGI.eu will support communication with NGIs. In this way EGI.eu and NGIs can benefit from the analysis of how the infrastructure can better integrate service delivery.

Expected outcome:

- M2.1: Alignment of terms definition
- M2.2: Survey on current obstacles and requirements for providing services for users. EGI agrees to circulate a survey to grid operators and strongly encourages people to participate
- M2.3: Role of each actor in service delivery and service provision to users

A.3 Dissemination

Parties Involved: EGI.eu (Catherine Gater), gSLM (Owen Appleton)

¹ Party leading the activity is underlined.

Description of work: Disseminate the progress and final results of the collaboration within EGI and gSLM communities. Provide access to dissemination in the EGI ecosystem to gSLM, and provide access to the commercial ITSM community to EGI.eu.

Expected outcome:

- M3.1: Advertising the start of the collaboration on each party website with a dedicated static page and news article
- M3.2: Joint technical sessions at EGI and gSLM community events disseminating the progress and results of the collaboration. Specifically, gSLM agrees to attend and provide sessions at the 2011 EGI Technical Forums and 2012 Forums, while EGI.eu agrees to present at the MDGS workshop at EuroPar2011 and at a gSLM organised workshop in 2012
- M3.3: Advertise the products of the collaboration after the first year of joint work through a joint article to be published on both project websites or, if mutually agreed, a suitable external publication

A.4 Training

Parties Involved: EGI.eu (Sergio Andreozzi), gSLM (Owen Appleton)

Description of work: Organise at least one tutorial on IT Service Management at the EGI Technical Forum tailored to the characteristics of the European Grid Infrastructure. The tutorial will be given by gSLM staff and EGI.eu will promote it and encourage participation. More tutorials can be organised upon agreements between the parties (e.g., at the EGI Forums in 2012).

Expected outcome:

- M4.1: A training plan covering topics and training structure will be agreed between the two parties
- M4.2: gSLM presents a training/tutorial session for the EGI Technical Forum 2011
- M4.3: gSLM provides training material generated for the above event to be made available by EGI.eu beyond the lifetime of gSLM

A.5 Liaison with infrastructure customers: EGI.eu (NA3, Steve Brewer), gSLM (WP5, Tomasz Szepieniec)

Description of work: VRCs are customers of the grid infrastructure, therefore introducing SLM should take into account VRCs' requirements. The goal of this activity is to establish communication channel between gSLM and VRCs to identify requirements related to SLM. EGI.eu will enable their communication channels and means to collect requirements based on survey prepared by gSLM. An analysis of the survey responses will be sent to EGI.eu in the form of a report. The results of the survey will be reflected in gSLM requirements catalogue. gSLM will also ask for feedback from VRCs on whitepapers prepared by the project.

Expected outcome:

- M5.1: Survey on current obstacles and requirements for service provisioning for VRCs. EGI agrees to circulate a survey to VRCs
- M5.3: Feedback on related whitepapers

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.

Date ²	Activity	Additional Information
06/2011	M4.1	Requires gSLM to submit a proposal for tutorial at the EGI Technical Forum 2011
07/2011	M2.1	Requires a report proposing alignments of EGI terminology as in use within ITSM (report led by gSLM, Tomasz Szepieniec)
09/2011	M5.1	Requires input collection from VO Managers based on gSLM User Survey (http://www.surveygizmo.com/s3/510606/gSLM) and report analysing the results of the survey (report led by gSLM, Tomasz Szepieniec)
09/2011	M4.2	Requires a short report on the outcome of the training session (report led by gSLM, Owen Appleton).
11/2011	M2.2	Requires a report analysing the result of the survey (report led by EGI.eu, Tiziana Ferrari)
11/2011	M3.2	Requires a report on dissemination activities (report led by EGI.eu, Catherine Gater). Requires EGI.eu to submit a proposal for a talk/session at MDGS 2011.
12/2011	M1.1	Requires a report describing the status of SLM implementation in EGI infrastructure (report led by gSLM, Thomas Schaaf)
01/2012	M2.3	Requires a report describing the role of each actor in service delivery and service provision to users (report led by gSLM, Tomasz Szepieniec)
05/2012	M3.3	Requires gSLM and EGI.eu to advertise the results from their first year of collaboration (report led by gSLM, Owen Appleton)
06/2012	M5.3	Requires a report providing feedback on the white papers (report led by EGI.eu, Steve Brewer)
07/2012	M1.2	Requires EGI.eu to provide an early feedback on gSLM

²

If not specified, the deadline is the last working day of the month



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		final roadmap (report led by EGI.eu, Sergio Andreozzi)
09/2012	M4.3	The milestone is achieved by training material from gSLM being made available on the EGI website.
08/2012	M3.2 (update)	Requires a report on dissemination activities (report led by EGI.eu, Catherine Gater)

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)

gSLM: Tomasz Szepieniec (t.szepieniec@cyfronet.pl)

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

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.



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 by the authorised representatives of the Parties 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:

Dr. Steven Newhouse
EGI.eu Director

Dr. Thomas Schaaf
gSLM Project Director

20/06/2011

Date

20/06/2011

Date



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) 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.



Annex 2 gSLM Description

The gSLM project aims to improve Service Level Management (SLM) in the grid domain. By bringing together experts in grid operations and management with leading members of the IT service management community, the project will generate new approaches and concepts for grid SLM.

The need for grid SLM

Grid computing is a powerful technology, widely used for more than a decade in the scientific community for large-scale computation and the distributed storage and management of data. The grid has come a long way, but to continue to its successful development it needs to shed some of its academic heritage. The agreements used to connect the hundreds of thousands of computers in Europe's academic grids are generally quite informal. This was sufficient in the past, as the grid was still in development, and loose agreements were sufficient. Now that the grid is increasingly used for mission critical or commercial purposes, a new, more concrete approach based on more formal Service Level Management is needed.

Bringing SLM to grids

SLM is a set of tools and processes widely used in the commercial sector to agree, define and measure the provision of a service, whether it is with a telecoms operator or a cleaning company. It ensures customers and providers can work together efficiently and have a common view of a service. This approach is needed on the grid to transit from informal to formal agreements. The gSLM project will bring together SLM experts from the IT Service Management community with grid experts, to find ways to bring up the decades of experience of SLM in the commercial sector to grid infrastructures.

The outcomes of gSLM

Through consultation at special workshops and at events from both communities, gSLM will build up a body of experience on grid SLM that can be used to guide management of grid services in the coming years. This experience will be captured in a series of white papers and strategic roadmaps. In 2011 it will run a special session during the BDIM2011 workshop on Business Driven IT Management at the major IT Service Management event IM2011, and is organising the MDGS2011 workshop on Managing and Delivering Grid Services at the Euro-Par 2011 conference.



Annex 3 Rights and Responsibilities

A. GENERAL

1. gSLM 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.

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.
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



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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 gSLM 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 EGI.eu.



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.