



# EGI-InSPIRE

## ESTABLISHING THE EXTERNAL RELATIONS AREA OF THE WEBSITE COVERING THE POLICY BODIES AND COLLABORATING PROJECTS

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#### Abstract

This document describes the changes to the policy area of the EGI website over the last 10 months. This policy area is to enable interested stakeholders and parties to locate relevant policy related information, including the established policy groups within EGI as well as EGI collaboration with external partners. A few screenshots of the policy pages are also provided.



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## II. DELIVERY SLIP

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## III. DOCUMENT LOG

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3	06/07/2011	Final draft	Damir Marinovic / EGI.eu
4	13/07/2011	Revised following comments from reviewers	Damir Marinovic, Sergio Androozzi / 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

The aim of this document is to present the modifications to the policy area of the EGI website, changes made during the process of identifying and organising policy groups within EGI.eu and collaboration with external organisation, projects and bodies.

The changes in the web site structure related to policy activities were made in order to improve visitors' understanding of the EGI policy development activities and provide quick identification of designated contact points and policy documents produced by specific policy groups. In addition, more focus and specific details have been given regarding collaborations with Technology Providers, Resource Infrastructure Providers, Virtual Research Communities, International policy bodies and standards organisations and coordination and support projects. Thus, the major changes occurring in the policy area of the EGI website have been in these two areas while allowing expansion with new sections that will further exploit EGI collaborations with external partners.

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 by the EGI.eu Policy Development Team (PDT). The latter refers to collaborations and policies involving relationships with external partners.

The URL structuring provides a stable and clear organisation of the information and dedicated pages for individual policy groups and external partners. A consistent and clear structure eases the location of information and makes it is easier to link them bi-directionally. Therefore, the current policy area of the EGI.eu website has stabilised, the structure of the policy area is in a more mature state with a clear organisation, enabling interested stakeholders and parties to locate the needed information for understanding or participating in the EGI policy development activities.



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## 1 INTRODUCTION

The purpose of this document is to describe the changes made to the policy area of the EGI.eu website structure starting from November 2010, after the finalisation of the milestone MS205: *Establishing the policy area of the website covering the policy bodies and collaborating projects* [R1]. The goal of MS205 was to provide a plan for establishing the area of the website in order to cover general policy activities, outline EGI policy groups as well as offer a reference point for EGI.eu collaboration with other projects or organisations.

The changes made afterwards improve National Grid Initiatives (NGIs) and European Intergovernmental Research Organisations (EIROs) understanding of the EGI policy development activities and quick identification of designated contact points in order to act on and cooperate with; ease the identification of the policy documents produced by specific policy groups and provide more focus and specific contact details on collaborations with Technology Providers, Resource Infrastructure Providers, Virtual Research Communities, International policy bodies and standards organisations and coordination and support projects.

In general, the policy content on the EGI website is to provide a broad overview and introduction to the policy activities, groups, documents and collaboration with external partners. Web content is designed to be fairly static, while the policy information that needs to be updated on a regular basis is done through the EGI wiki site. This is done since the EGI wiki site is more suitable for editing collaborative content.

The main target groups for the policy area are EGI's main stakeholders, NGIs and EIROs, external partners and parties, as well as the general public who is interested in learning about the policy making activity within the EGI community. Therefore, the primary goal is to find a balance between the general information that is necessary for the audience to grasp the way the policy development process works in EGI.eu, while also informing an audience interested in more detailed and precise content and in specific policy documents of the concrete policy groups. This document is structured as follows: Section 2 describes the website organisation for the policy area while Section 3 draws a conclusion.

## 2 WEBSITE ORGANISATION FOR THE EXTERNAL RELATIONS AREA

The importance and role of the policy area of the EGI website is to properly communicate the EGI.eu policy development process, activities of the EGI policy groups, related document and collaborations with external partners. A well-structured web site about policy activities is important in order to increase effectiveness and efficiency of EGI policy activities.

The policy area is divided between two main sections: policy and collaboration. The former focuses on policy development in general and description of EGI groups (see Section 2.1), while the latter focuses mainly on collaboration with external partners (see Section 2.2).

### 2.1 /policy

The entry point page of the website regards internal policy activities dedicated to explain the fundamentals of the EGI.eu policy development activities. The web page provides a definition of EGI.eu policies, followed by highlighting the importance and principles of the EGI.eu development process [R2]. Links are also provided to key areas such as EGI's Policies and Procedures that can be developed internally by policy groups or in collaboration with external partners, policy group pages and policy discussions and policy papers that are archived and available through the EGI.eu document repository (see Figure 1).

The sub-section of the policy area provides a dedicated page to present the EGI policy groups, their general role and responsibilities, composition and operational procedures (see Figure 2) [R3]. In order to provide visibility for the activities of the various groups, each EGI policy group has a separate web page. It should be noted that each group belongs to a specific functional area (security, operation, technology and user community) and that there is no hierarchical relationship among them. Dedicated pages are available for the following groups:

- Technology Coordination Board (TCB)
- Operations Management Board (OMB)
- Operational Tools Advisory Group (OTAG)
- Operations Automation Team (OAT)
- User Community Board (UCB)
- User Services Advisory Group (USAG)
- Security Policy Group (SPG)
- Software Vulnerability Group (SVG)
- Security Coordination Group (SCG)
- EGI Computer Security Incident Response Team (CSIRT)

Together with the Group chairs, the Policy Development Team (PDT) has clarified the purpose, composition and operational procedures of each EGI policy group by defining Terms of References (ToRs). 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, therefore the content of this page will remain fairly static only adding to the “resources” as needed.


Dedicated pages describe the policy group name, contact details for the group chair and secretary who provides minutes for each of the meetings, the functional area, purpose and links to the ToRs, group wiki page and in some cases meeting schedules. For overall group information that needs to be regularly updated, the PDT has created separate wiki pages containing the member list, documents, meetings and minutes (see Figure 3). In Table 1, the URL structure for the policy area of the website is summarised.

**Table 1 URL Structure for the Policy Area**

Relative URL	Content
/policy	General page about EGI.eu policies
/policy/groups	General page about policy groups
/policy/groups/[GROUP_NAME]_[ACRONYM]	Internal Policy Group - dedicated page

Figures 1, 2 and 3 show sample screenshots of the policy area pages in the EGI.eu website.



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- User Support
- Technology
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- Publications
- Projects
- Collaborations

## Policy

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### What are EGI.eu policies?

EGI.eu policies are clear, formal and mandatory statements or positions adopted by the EGI.eu governance bodies for issues relevant to the EGI community.

Our policies cover a wide range of issues, starting from long-term strategic cooperation with other e-infrastructure providers, to specific problems affecting our user community.

EGI.eu policies are the direct, strategic link between the [EGI.eu mission](#) – to ensure a long-term, sustainable grid infrastructure available to all European scientists and their international collaborators – and its daily activities in grid operations, software quality, security and user communities.

[Policies and procedures](#) can be developed internally by [policy groups](#) or in collaboration with [external partners](#).

### Why are EGI.eu policies important?

#### Providing guidance

Policies define EGI.eu's key activities. They ensure consistency, fairness and minimise potential sources of litigation. Policies provide strategic guidance to decision makers on how to handle issues as they arise and give direction to staff on their daily practices.

#### Improving decisions

Our policies are grounded on established policy tools such as the use of research, analysis and evaluation. This leads to well-balanced documents that address the specific needs of decision makers and staff alike. EGI.eu ensures that all stakeholders and partners have access to the policies to maximise the benefits to managerial and decision making processes.

#### Clarifying roles and responsibilities

Well-defined policies allow all actors - NGIs, EIROs, internal and external policy groups - to understand their roles and responsibilities within predefined limits. Our policies eliminate common misunderstandings and clarify the stakeholder's responsibilities, as well as their obligations towards the community.

#### Managing risks

Policies allow us to manage risks, anticipate problems and prevent costly mistakes. In that sense, policies act as a roadmap where travel information is highlighted to prevent sidetracking from the ideal route.

The successful implementation of EGI.eu policies within a well defined strategic framework will contribute to the main goal of the EGI.eu and European Grid community in general.

### What are EGI.eu's policy development principles?

Our policy development process rests on the following fundamental principles:

#### Openness

Policy development is open to all stakeholders and actors within EGI community and follows an established participatory process of collaboration. Interested parties concerned with the EGI.eu policy development are welcome to contact the relevant [policy group](#) and in agreement with them take part in their policy discussions.

#### Transparency

The process is transparent. Policy discussions and policy papers are archived and available through the [EGI.eu document repository](#) to all interested parties and stakeholders.

#### Consensus

Whenever possible, policy document approval will be based on consensus.

#### Related pages

- > [Policy groups](#)
- > [Policies and procedures](#)
- > [External collaborations](#)

#### Contact

Policy Development Team:

- > [Sergio Andreozzi](#)
- > [Damir Marinović](#)
- > [Sy Holsinger](#)
- > [policy@egi.eu](mailto:policy@egi.eu)

Join the discussion

- > [policy-discuss@egi.eu](mailto:policy-discuss@egi.eu)

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Figure 1 - General page about EGI.eu policies



The screenshot shows the EGI.eu website page for "Policy groups". The page features a navigation menu on the left with categories like "About us", "User Support", "Technology", "Policy", "Infrastructure", "Publications", "Projects", and "Collaborations". The main content area is titled "Policy groups" and includes a breadcrumb trail: "Home > Policy > Policy groups". The page is divided into three columns: a left sidebar with navigation, a central main content area, and a right sidebar with "Active policy groups" and "Related pages".

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**Policy groups**  
[Home](#) > [Policy](#) > Policy groups

**About us** | **User Support** | **Technology** | **Policy** | **Infrastructure** | **Publications** | **Projects** | **Collaborations**

### What is an EGI.eu policy group?

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 and administration). They are responsible for developing EGI.eu's strategic and operational policy framework and, thus, for ensuring the stability and availability of a European generic e-Infrastructure.

Each policy group has well-defined responsibilities, composition and operational procedures. 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.

### How do policy groups work?

EGI.eu is keen to involve all relevant stakeholders in the policy development process. In practice, this means that we will 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.

The purpose, composition and operational procedures of EGI.eu policy groups are defined by Terms of Reference (TOR).

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.

#### Active policy groups

- > [Technology Coordination Board](#)
- > [Operational Tools Advisory Group](#)
- > [Operations Management Board](#)
- > [Operations Automation Team](#)
- > [User Community Board](#)
- > [User Services Advisory Group](#)
- > [Security Policy Group](#)
- > [Software Vulnerability Group](#)
- > [Security Coordination Group](#)
- > [Computer Security Incident Response Team](#)

#### Related pages

- > [External collaborations](#)

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Figure 2 - General page about EGI.eu policy groups



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## Operations Management Board

[Home](#) > [Policy](#) > [Policy groups](#) > Operations Management Board

**Chair** [Tiziana Ferrari](#)  
Chief Operations Officer EGI.eu  
tiziana.ferrari@egi.eu

**Secretary** [Peter Solaqna](#)

**Description** The **Operations Management Board (OMB)** develops the strategy and defines the technical priorities of EGI's production infrastructure.  
  
The OMB also oversees the status and progress of the global EGI and individual NGI operational services.

**Main tasks**

- > Advise the EGI.eu Director on operational strategic and technical issues.
- > Identify current and future problem areas and propose corrective actions.
- > Compile usage information and collect technical operational requirements and bring this input to the [Technical Coordination Board \(TCB\)](#).
- > Examine requirements from Virtual Research Communities (VRCs), external software provider and other parties that will require changes to the operational procedures and tools, and to liaise with the [User Community Board \(UCB\)](#).
- > Define plans for the long-term development of EGI operations.

**Membership** The OMB is chaired by EGI's Chief Operations Officer (COO) or the COO's deputy.  
  
Other members include operations managers of NGIs that contribute resources to the EGI infrastructure, leaders of EGI-InSPIRE SA1 tasks and leaders of EGI operational global services.  
  
Other experts may be invited to join OMB meetings when their contribution is relevant to the group's agenda.

**Resources**

- > [OMB wiki page](#)
- > [Terms of reference](#)
- > [Meetings](#)

**Active policy groups**

- > [Technology Coordination Board](#)
- > [Operational Tools Advisory Group](#)
- > [Operations Automation Team](#)
- > [User Community Board](#)
- > [User Services Advisory Group](#)
- > [Security Policy Group](#)
- > [Software Vulnerability Group](#)
- > [Security Coordination Group](#)
- > [Computer Security Incident Response Team](#)

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**Figure 3 - Sample page about an EGI.eu policy group (OMB)**



## 2.2 /collaboration

The initial version of the policy area of the website (see MS205 [R1]) was constituted by one main section '/policy' containing information about both EGI policy groups and external relations. During the first year of the project, collaboration activities have been very intense and several Memoranda of Understanding (MoUs) were signed. In order to give better visibility to this area, it was decided to promote the collaboration area as primary section of the website.

The entry point page of the new section is '/collaboration' and is part of the main menu of the EGI website. The page includes the identification of different categories of external partners with whom EGI collaborates. The main page details the importance of cooperation in an EGI context and EGI policy on collaboration with external partners. Finally, the EGI PDT provides external partners with information and contact details in order to discuss partnership opportunities and all advantages of cooperation with EGI.eu [R4].

The cooperation with external partners with EGI.eu/EGI-InSPIRE is established through informal collaboration (e.g. through participation in reciprocal events) or through formal partnership via membership or a MoU. External partners fall into the following categories:


- 1) Technology Providers
- 2) Resource Infrastructure Providers
- 3) Virtual Research Communities
- 4) International policy bodies and standards organisations
- 5) Coordination and support projects

Moreover, a specific page for each party with which formal agreements exist or other acknowledged form of informal collaboration is provided. A dedicated web page for each describes the external partner and category (according to EGI classification listed above), description of the related partner activities, overview of the joint work plan (defined in cases of an MoU) and links to external partner website, related MoU and the relevant news announcing collaboration. In Table 2, the URL structure for the collaboration area is summarised.

**Table 2 URL Structure for the Policy Area - Collaboration**

Relative URL	Content
/collaboration	General page about collaboration
/collaboration/[PARTNERNAME]	EGI's partner – dedicated page

In Figures 4 and 5 a sample screenshot of the policy area pages in the EGI.eu website is shown.



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## Collaborations

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### Who are our partners?

The EGI.eu is continuously working to establish collaborations with external partners in the following categories:

- > **Technology Providers**, to develop and deliver robust and user-centric software to enable and run EGI.
- > **Resource Infrastructure Providers**, to share geographically distributed ICT resources to be federated and operated under EGI and offered to the user communities.
- > **Virtual Research Communities**, to use EGI to collaborate across borders and achieve/share scientific results.
- > **International policy bodies and standards organisations**, to produce strategic and technical policies for Distributed Computing Infrastructures (DCIs) such as EGI.
- > **Coordination and support projects**, to support EGI in communicating results or coordinating across DCIs.

Details on individual terms of collaboration are published as agreements are signed with the different partners.

### Why are external collaborations important?

One of the main goals of EGI.eu is to bring European distributed computing initiatives into an integrated e-Infrastructure that is able to seamlessly peer with equivalent e-Infrastructures around the world.

This ambitious aim requires the close support of external partners, outside the EGI community which are equally committed to the development of e-Infrastructures. For the sustainable operation of EGI, it is crucial to interact with technology and infrastructure providers, as well as with our user communities to drive the evolution of our services.

### What is the EGI.eu policy on external collaborations?

To nurture such collaborations, EGI.eu needs to establish and formalise agreements with relevant partners on the European and global level.

Each external collaboration is formalised via a Memorandum of Understanding (MoU), i.e., a signed document written to confirm and define the framework of collaboration between EGI.eu and individual partners.

The EGI.eu recognises MoUs as tools to open wide and long-term activity and cooperation with partners. Such collaborations will ultimately bring visible benefits to scientists and researchers. In addition, external collaborations will be formalised through membership and participation in international policy bodies.

### How to Collaborate?

Collaboration with EGI.eu is typically formalised through negotiating and signing a MoU. A number of templates are available depending on the category of the engaging partner.

The aim of formal partnerships is to strengthen the ability of the parties involved to mutually solve problems, benefit from the interchange of ideas and practices and strive towards a common goal. The MoUs define these objects and assign roles, responsibilities and communication methods. The MoUs also specify areas of confidentiality, periodic review of the document, milestones and monitoring of their achievement as well as joint participation in technical (e.g. data challenge) and/or dissemination activities.

To discuss partnership opportunities and all advantages of collaboration with EGI.eu, please contact us at [policy@egi.eu](mailto:policy@egi.eu).

### EGI's partners

#### Technology Providers

- > [EMI](#)
- > [IGE](#)
- > [SAGA](#)
- > [StratusLab](#)

#### Resource Infrastructure Providers

- > [UFRJ \(Latin America\)](#)

#### Virtual Research Communities

- > [CLARIN and DARIAH](#)
- > [LSGC](#)
- > [WeNMR](#)

#### Policy and standards bodies

- > [e-IRG](#)
- > [EUGridPMA](#)
- > [Open Grid Forum](#)

#### Other projects

- > [DECIDE](#)
- > [ERINA+](#)
- > [e-ScienceTalk](#)
- > [GISELA](#)
- > [gSLM](#)
- > [Mantychore](#)
- > [SIENA](#)

### Related pages

- > [Policy groups](#)

### Contact

Policy Development Team:

- > [Sergio Andreozzi](#)
- > [Damir Marinović](#)
- > [Sv Holsinger](#)
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Figure 4 - General page about EGI.eu collaboration

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## Initiative for Globus in Europe

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<b>Name</b>	Initiative for Globus in Europe (IGE)	 <a href="http://www.ige-project.eu/">http://www.ige-project.eu/</a>
<b>Area</b>	Technology provider	
<b>Agreement</b>	MoU signed on 20 January 2011 ( <a href="#">MoU</a> )	
<b>About IGE</b>	The IGE project aims to be a comprehensive service provider for the European e-infrastructures regarding the development, customisation, provisioning, support (including training), and maintenance of components of the Globus Toolkit, in close collaboration with EGI, other distributed computing infrastructure projects, and standard development organisations.	<b>Related pages</b> > <a href="#">Collaborations</a>
<b>Overview of the joint workplan</b>	EGI and IGE will work together 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: <ul style="list-style-type: none"><li>&gt; to provide robust, well-designed, user-centric services to scientific user communities</li><li>&gt; to define and monitor SLA for third-level support on incidents and requests</li><li>&gt; to accelerate the development of standards within production grid infrastructures</li><li>&gt; to disseminate the results of this collaboration within the remit of each project's dissemination and communication activities such as joint events</li><li>&gt; to exchange ideas and collaborate on the definition of sustainability models</li><li>&gt; to collaborate in business relationships development</li></ul>	<b>Other technology providers</b> > <a href="#">EMI</a> > <a href="#">SAGA</a>
<b>Resources</b>	<ul style="list-style-type: none"><li>&gt; <a href="#">IGE: Promoting Globus in Europe and Europe in Globus</a> (Inspired article, Winter 2011)</li><li>&gt; <a href="#">Related news item</a></li></ul>	

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Figure 5 - Sample page about an EGI partner (IGE)





### **3 CONCLUSION**

The goal of this document was to describe the changes to the policy area of the EGI website over the last 10 months. The changes are result of close monitoring of the EGI policy development dynamics that lead to more focus on certain areas of EGI policy development such as collaboration with external partners.

The URL structuring provides a stable and clear organisation of the information and dedicated pages for individual policy groups and external partners. Consistent and clear structure simplifies the finding of the information and the linking to them. Thus, the current policy area of the EGI.eu website is stabilised, the structure of the policy area is in mature state with a stable and clear organization enabling interested stakeholders and parties to locate the needed information for participating in the EGI policy development activities.



## 4 REFERENCES

R 1	MS205 Establishing the policy area of the website covering the policy bodies and collaborating projects <a href="https://documents.egi.eu/document/93">https://documents.egi.eu/document/93</a>
R 2	General Policy web page <a href="http://www.egi.eu/policy">http://www.egi.eu/policy</a>
R 3	General Policy Group web page <a href="http://www.egi.eu/policy/groups">http://www.egi.eu/policy/groups</a>
R 4	General Collaboration web page <a href="http://www.egi.eu/collaboration/">http://www.egi.eu/collaboration/</a>
R 5	PDT Wiki page <a href="https://wiki.egi.eu/wiki/PDT:PDT">https://wiki.egi.eu/wiki/PDT:PDT</a>