30th e-IRG delegates meeting

Athens, Greece, 13-14 September 2012

Public Summary

Blue Paper on Data Management

Norbert Meyer explained that the Blue Paper addresses requirements from four ESFRI cluster projects and also from some other projects. The current version includes feedback and comments from the public consultation phase so that the document can be presented to the ESFRI Council and also create a concise version.

Bjørn Henrichsen noted that ESFRI does not own the ESFRI projects. A report stated that a data infrastructure for SSH can be used by other disciplines, e.g. medical sciences. A proposal to integrate infrastructures for different sciences resulted in the ESFRI cluster projects. A crucial question is how to succeed in creating a European infrastructure and how to convince the projects to work together. The Blue Paper is very important for ESFRI and the question now is how to ensure the uptake of the report by stakeholders. ESFRI delegates are mainly from the (non-technical) policy-level, so it is important to stress the European-level policy aspects and also target to the Ministries.

Norbert Meyer explained that the cluster projects were addressed with the aim to find a common base and realise some integration. A common metadata structure has to be defined taking into account all views. He noted that this Blue Paper was a starting point and that there should be continuous cooperation with ESFRI.

Yannis Ioannidis mentioned that the Blue paper would have an impact: it captures quite a lot in one framework. A problem is that some technology or challenges are not yet there to pick-up. An issue is that the data management research community as important stakeholder needs to participate.

Bjørn Henrichsen mentioned that recommendations about funding needs to be included. Kostas Glinos said that this would be useful for national and EC projects.

ERA Communication

Kostas Glinos reported that on 17 July 2012 three Communications had been adopted: the Communication "A reinforced European Research Area Partnership for Excellence and Growth", the Communication "Towards Better Access to Scientific Information – Boosting the Benefits of Public Investments in Research", and the Recommendation "Access to and Preservation of Scientific Information".

The objective of the 'ERA COM' is to complete the ERA by 2014. The priorities are:

- More effective national research systems
- Optimal transnational co-operation and competition
- An open labour market for researchers
- Gender equality and gender mainstreaming in research
- Optimal circulation, access to and transfer of scientific knowledge including via digital ERA

Kostas Glinos noted that there should be more effective and connected national research systems and that the recommendations to the Member States will include: more competition (1st priority), more linked research (2nd priority), opening up research labour market (3rd priority), promoting general quality (4th priority) and improving knowledge and its circulation (5th priority), the latter also covering digital communication.

Four actions call for cooperation with e-IRG. In 'Optimal transnational co-operation and competition' the Commission will: "Develop in cooperation with ESFRI, e-IRG and other stakeholders a Charter of Access setting out common standards and harmonised access rules and conditions for the use of RIs", "Define with ESFRI, e-IRG and other stakeholders common evaluation principles, impact assessment criteria and monitoring tools which can be applied in regional, national and European programmes to help combine funds from different sources" and "Work with e-IRG to promote the alignment of EU and national approaches to e-infrastructure development and use"

In 'Optimal circulation, access to and transfer of scientific knowledge' Member States are invited to "Harmonise access and usage policies for research and education-related public e-infrastructures and for associated digital research services enabling consortia of different types of public and private partners".

Roadmap 2012

Anton Frank reported the status of the Roadmap 2102. The activities are focused on sharpening the direction and content of the Roadmap, making it a more forward-looking document in line with the Copenhagen conclusions and the new strategy. The Roadmap should be published before the end of 2012.

Kees Neggers noted that today there are many forward-looking documents 'on the table' that can provide very good input for the roadmap, e.g. the e-IRG Policy Paper on Scientific Software and the Cloud Computing report.

Task Force on Scientific Software

Sverker Holmgren presented the status of the report on Scientific Software. He mentioned that the other authors had mainly written the content. He recalled that today's paradigm shifts require a significant software effort, which is the background for the work of the Task Force. He explained the mandate of the Task Force and the modus of work. The document has 20 pages and the section on funding and governance was the most challenging part. The main recommendation is that to address the software crisis the Commission and the Member States should provide support and funding for the establishment of Centres of Excellence for Scientific Software (CESS) focusing on scientific software using a holistic approach.

Kostas Glinos pointed out that the report is extremely timely because the Commission needs input, especially for the actions related to the HPC Communication. The Commission is organising a meeting on this subject that will take place in a month's time. He asked if the issue of how to transfer ownership/maintenance of software from non-professional environments (e.g. universities) to a CESS is tackled in the report. Sverker Holmgren answered that this has been discussed but there is not a clear solution; the key point is ownership. It will be a task for CESS.

Leif Laaksonen remarked that the report is very good and that it was provided by experts.

Task Force on Cloud Computing

Fotis Karayannis presented the work of the Task Force on Cloud Computing. He first recapitulated the background, history and objectives. The status is that the report with the updated recommendations included is ready and open for comments from the delegates. He summarised the contents of the report and its recommendations.

Kostas Glinos was missing aspects at the national level: what are the countries' experiences, why is a European level needed, is public funding at EU level really needed? He commented that innovative aspects of clouds are missing and asked how e.g. joint pre-commercial procurement would help the EU to get cloud-supplied services.

Bob Day said that the UK is looking to commercial cloud services. He does not see at this moment the need to develop clouds since there is an international (commercial) space and he is not convinced that we need to produce recommendations now.

The Task Force will finalise the report within 5 weeks. Other issues rose pertained to new activities within this area in the next period. National policies are missing and they are important. What are the policies of the Member States; do they want to pool resources? This topic could be given as homework to the delegates: ask their Ministries about national policies for using the cloud. The follow-up will be discussed in a future meeting of the Executive Board.

Task Force on Legal Issues

In the last e-IRG delegates meeting the Task Force on Legal Issues (TFLI) was established to study the legal issues related to commercial use of public e-Infrastructures. e-IRG can contribute to the realisation of the ERA COM actions and the idea is to extend the scope of the Task Force to cover besides legal other issues such as access and usage by private parties. The timeline of the new Task Force will be related to the EC planning. The starting point will be at the end of 2012, policy options before the end of 2013 and final policies and an action plan before the end of 2014.

Bob Day volunteered to lead the Task Force. He proposed to update the ToR, but to achieve results he suggested to focus first on the legal issues and then on the rest. He noted that private use of e- Infrastructures is also relevant to the networks.

It was agreed that the Task Force should include delegates and legal experts, it was also decided to follow-up on the legal effort of OpenAIRE, ESFRI and PRACE.

Presentations by participating invited experts and discussion

Jose Cotta presented the new unit digital science in DG CONNECT. He talked about the problems, objectives and scope of digital science and the focus of his unit. He observed that Open Access is important in the Communications on the Digital Agenda, the Innovation Union and the ERA. The EC has a triple role: policy making, research funding and capacity-building/supporting body. He recalled the Open Access activities in FP7 and Horizon 2020 noting that Open Access will be mandatory in Horizon 2020. Finally he elaborated on Global Systems Science: ICT in support of evidence-based policies and on increasing citizen's engagement and level of trust in governance.

The Chair asked if and how the e-IRG can support policy making in the Open Access area. Jose Cotta answered that he works closely with Kostas Glinos in particular on Global Systems Sciences. Infrastructures have to be built and data is or will be a main component of the infrastructure, not only scientific data but also public data.

Yannis Ioannidis presented OpenAIREplus and explained that research is global, while policies are local (not only geographical but e.g. also thematic) and currently we are in a transient period in scholarly and scientific communication. OpenAIRE is an open access public infrastructure supporting the Open Access policy in Europe. The technical infrastructure is not enough and OpenAIRE has developed a human network of national Open Access desks covering all Member States. OpenAIREplus goes to the next level covering more countries (now 33), going beyond FP7 and the EC, linking publications to datasets, including funding information and collaborating with many initiatives. More than 6 million Open Access publications have been validated so far. Data policies involve understand data semantics, IPR issues and align national initiatives. Heading to Horizon 2020 d-Science will involve governance models for sustainability and policies on use and participation.

The Chair asked what issues e-IRG can focus on in this area and how e-IRG can help. Yannis Ioannidis said that things like the Blue Paper are extremely important as a tool to trigger discussion on what is coming. But also policy issues that he finds can be pushed towards e-IRG. So there are mutual benefits from communication.

The Chair noted that Amsterdam will have data as the theme and invited Yannis Ioannidis to bring ideas forward for this meeting. Kostas Glinos suggested, referring to the alignment of national initiatives, to take cooperation in various countries as focus for the Amsterdam meeting.

Allison Kennedy presented EUDAT and depicted several aspects of the EUDAT project. Its consortium consists of 25 participants ("data scientists", data centres, technology providers) from 13 countries. The goals are to create a cost-effective, high-quality collaborative data infrastructure (CDI) that meets users' needs in a flexible and sustainable way across geographical and disciplinary boundaries. The five core communities are EPOS (European Plate Observatory System), CLARIN (Common Language Resources and Technology Infrastructure), ENES (Service for Climate Modelling in Europe), LifeWatch (Biodiversity Data and Observatories) and VPH (The Virtual Physiological Human). They all share common challenges: reference models and architectures, persistent data identifiers, metadata management, distributed data sources and data interoperability. She encouraged the delegates to attend EUDAT's first conference on 22-24 October 2012 in Barcelona where sustainability and funding models will be on the agenda. A first version of the EUDAT Sustainability Plan is due at the end of September 2012. She explained the six principles for a sustainable Current Data Infrastructure (CDI): 1) Data deposited with the EUDAT CDI will be preserved in perpetuity, 2) Access to data in the EUDAT CDI is free at the point of use, 3) Data are best curated in their own communities, 4) EUDAT will operate as a federation of community-facing repositories and "back-office" hosting providers, 5) For an EUDAT community repository to be designated a "trustworthy digital repository" (TDR), it follows that EUDAT services and infrastructure must be suitable candidates for TDR out-sourcing, 6) EUDAT will not assert ownership of any data that it holds. She said that the EUDAT funding model should be independent from the set of services provided, the choice of organisational and legal model should be linked to policy and funding, research users should have single sign-on to European research e-Infrastructure (user identity), and the ability to move data to be processed on HPC or cloud/cluster needs a common set of protocols for data movement around European e-Infrastructure. Costing models are being investigated. In particular, regarding activity based costing, four cost objects have been identified: a data store service, a data archive service, a data access service and the metadata catalogue. She concluded stating that co-ordination and co-operation with other e-Infrastructures is essential to meet the needs of the communities. International co-operation in policy initiatives is also vital e.g. the iCORDI project, supporting US-European links and European participation in the Research Data Alliance.

Reports and news

Bjørn Henrichsen reported that a new ESFRI group has been set-up on request of the EC to examine the progress. This Assessment Group will report within one year. ESFRI has asked the EC to make the ERIC regulations such that associated countries can participate; an amendment process has started and hopefully this participation will be possible in 2013. Several ESFRI Research Infrastructures are in the process of becoming ERICs (two have been accepted and four are in the pipeline in addition to one non-ESFRI RI). A new working group on Research Indicators is collecting reports from each country on how they see the developments of the ERA. All ESFRI thematic groups are looking at the implementation of their projects. All SSH projects are now under implementation, including new legal structures.

Kostas Glinos reported on the transition from FP7 to Horizon 2020 and what the priorities should be. Part of the new programme is similar as in the previous and includes Research Infrastructures and e-Infrastructures. New areas are innovation and human capital and these are principal funding areas of DG CONNECT. Policy for Research Infrastructures and international cooperation are as in the past and will complement the Cohesion, Structural and Social Funds. On the development, deployment and operation of ICT based e-Infrastructures the concrete objective is to achieve by 2020 a single and open European space for online research. The priorities are: data-centric science and engineering, computational infrastructure, research networks and e-Infrastructures for virtual research communities and e-Science environments.

Kostas Glinos mentioned the consultation workshops for Horizon 2020: GÉANT (18.1.2012), Industry and Innovation (8-9.3.2012), Open infrastructures for Open Science (11-12.4.2012), Use of HPC by SMEs (5.2012), Human Capital for e-Infrastructures (30.5.2012), Distributed Computing (18.9.2012) and HPC Centres of Excellence (18.10.2012). In addition inputs such as the GEG report, HLEG report on Scientific Data, e-IRG reports, studies (AA, clouds, etc.) have been received.

Kostas Glinos explained that going from FP7 to Horizon 2020 for every activity basic questions are asked: why are we doing this, metrics, what should be financed at the EU level, for how long should it be done, innovation: how, supply, use, public-private, legal, technology transfer, mechanisms, etc. Other questions are: triggering innovation in the supply chain (vendors), who uses the infrastructures, technology transfer to the market (technology office to peek into the projects and try to sell them to start-ups; should we do it and how to implement them), skills.

On the implementation of the recommendations of the Communications (ERA, Open Access, HPC, etc.) Kostas Glinos recalled that some would be done together with e-IRG and also ESFRI. Finally he elaborated on the relation of e-Infrastructures to the implementation of Horizon 2020. He gave the example of NSF that contracted four companies to provide cloud resources to NSF funded projects. A comparable question is how existing e-Infrastructures can facilitate Horizon 2020 projects; e.g. how can new Horizon 2020 projects get access to PRACE.

The Chair asked what the view is on the range of all infrastructure elements in Horizon 2020. Kostas Glinos answered that nothing dramatic is to be expected, that a mix of cooperation and competition is needed and that there are no plans for a monolithic infrastructure, because such a construction does not seem to be mature. In general, infrastructures should be built bottom-up with some top-down help, and there should be no overlapping infrastructures.

Rossend Llurba explained that e-IRGSP3 would end on 30.11.2013 while Horizon 2020 funding for a new support project will not be possible before autumn 2014. This will introduce a funding gap of approximately 9 months. Not having support is in contrast with the new e-IRG strategy, which is more ambitious than previously.

Kostas Glinos explained that there are no funding possibilities at this stage, but a project extension without additional funding is a possibility but that has to be decided by the EC.

Several options were discussed including: applying for funding for studies to be done by e-IRG (e.g. the legal one), applying for an extension, and reallocating internal resources of the project to cover at least the secretariat during the gap period.

e-IRG Strategy

The Chair noted that the current actions need to be discussed together with the new actions from the ERA Communication to understand the implications for e-IRG. He proposed to postpone this discussion until the next meeting. No objections were raised.

Bylaws

One proposed change to the bylaws is extension of the mandate of the delegates from 2 to 3 years (ESFRI has also a 3-year term). This will also off-load the work of the secretariat. The second proposed change formalises the commitment of the delegates to actively participate in the e-IRG work. There were also several minor textual proposals and an update of the mission in the bylaws.

Kees Neggers asked to consider allowing international organisations (e.g. CERN) to become member. **Leif Laaksonen** commented that he does not object but that it would dramatically change the view of e-IRG. **Neil Geddes** added that personally he agreed with Leif and that the UK view is similar: it would indeed change the nature of the body. **Bjørn Henrichsen** said that the same question was raised in ESFRI and that the answer was no. Kees Neggers pointed out that we need such stakeholders and that we still have the opportunity to liaise with them in another way. The Chair noted that inviting observers is an alternative approach and that this approach could be used more actively.

Election of the e-IRG Chair

Kees Neggers reported from the activities of the search committee and presented the search committee's candidate Sverker Holmgren, Sweden.

The delegates convened without the presence of the candidate. There were no objections to the candidate or the election process. Sverker Holmgren was unanimously elected as the next e-IRG Chair.

Gudmund Høst ensured that he would do anything required for a smooth transition. He also proposed to enlarge the Executive Board for the remaining year to include Sverker Holmgren.

The plenum appointed Sverker Holmgren as e-IRG Chair per 1.1.2013.