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Milestone M5.1
Enabling Communities Engagement Plan

Abstract
This document provides an overview of the outreach plan for the trust and identity services which fall under Work Package 5 of the GN4-3 project. A description of the 'enabling communities' task and the functional flow of information on leads generated by the outreach activities is also presented.

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Executive Summary

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1 Introduction

This document outlines the differing Trust and Identity (T&I) services' various plans and requirements for outreach to the relevant communities or stakeholders. This information can thus serve as a basis for aligning key messages across the T&I team (which covers all the tasks in WP5), and the communication and outreach teams. The document also serves as a point of reference for the T&I service teams and the wider GN4-3 project participants, aiding their understanding of the outreach requirements for each service area.

In outlining the Trust and Identity services that the T&I service teams are responsible for, this document also defines the communities that each service is targeting, the approach to outreach initiatives, and the methods that will be used for internal processes for logging, sharing and disseminating the information between the various teams. It should be noted that from the perspective of the individual services, the end user is catered for in the GÉANT project. Each service has a different definition of an end user, and thus a different target audience.

An in-depth description of each service is out of the scope of this document. However, the following chapters will present the role of the Enabling Communities task, the strategy to expand the outreach via a close collaboration with the User and Stakeholder Engagement work package (WP3) and the Global Partnerships/Service Outreach task in Project Management work package (WP1), and an overview of the outreach plan for the T&I work package (WP5).

The document furthermore lists the focus for each service that the outreach teams should target from the perspective of the service owners. In general, the focus is on global partners (WP1 T6), European partners (Partner Relations WP3 T1) or research organisations (Research Engagement and Support WP3 T2), unless otherwise stated.

2 The Role of the Enabling Communities Task

The Enabling Communities task (WP5 T4) has been conceived as a bridge between the T&I activities in WP5 and other work packages in the GN4-3 project, most importantly WP3. The task also offers a more structured interface with other external activities and stakeholders that are relevant to T&I. The task is intended to act as a catch-all activity to provide trust and identity business development support to communities not currently catered for or defined within the wider outreach activities in the project. These include Librarians in Federated Identity Management for Libraries (FIM4L), collaborative groups in AARC Engagement Group for Infrastructures (AEGIS) and researchers in Federated Identity Management for Research (FIM4R).

Via the Enabling Community task, the Trust and Identity work package seeks to establish a bi-directional channel with key stakeholders, namely research collaborations, federation operators, other relevant initiatives and EC-funded projects that pertain to T&I. The goal is to collect their input and requirements regarding specific areas that drive the evolution of existing and new T&I services.

The Enabling Community task will contribute to the wider efforts to improve interoperability of research and e-infrastructures by FIM4R, European Open Science Cloud (EOSC), Research and Education FEDerations group (REFEDS) and WISE. It will host the AEGIS group, a spin-off of the AARC project, which brings together global representatives from Authentication Authorisation Infrastructure (AAI) operators in research and e-infrastructures to discuss the adoption of policy and technical best practices that facilitate interoperability across e-infrastructures.

Each service within WP5 has an appointed service owner. Currently these are eduroam, eduGAIN, eduTEAMS and InAcademia, who is responsible and accountable for the delivery of the service as a whole and for defining the service roadmaps. The service owners understand the outreach requirements for their service very well, and they define the key messages that characterise each service according to their audience.

In addition to the current services, an Incubator task within WP5 is developing potential new features and business models for the current services, and possible new T&I services, in a defined (typically 6 months') cycle. Channelling requirements into the T&I Incubator and validating features are therefore also responsibilities of the Enabling Communities task.

As the Enabling Communities task will be engaging with user communities, it will be in direct contact with the service owners and will pass on to them any new requirements captured as part of the task's activities. The task will coordinate very closely with the service owners in WP5 to provide a more specialised technical function supporting service outreach. At the same time the task will provide a more formal communication channel between outreach activities in other work packages and ongoing activities that are managed directly by each service, most notably with WP3.

3 WP5 and WP3 Collaboration Process

In the context of the GN4-3 project, communication with stakeholders takes place via different teams, through multiple channels and various mechanisms. Over the time of delivering a service, each service creates their own community, which is typically represented by technical people that use or deliver the service nationally or to a specific community. The service teams use engagement mechanisms that may be more or less specific to communities that are closer to the service delivery chain, for example participation in REFEDS or FIM4R community forums. However, the outreach teams that are sourced in other parts of the GÉANT project perform general outreach for all GÉANT services. The interaction is often with the same stakeholder organisations but may involve different people, for example, those in higher management functions such as CTO, CIO, head of department etc. It is therefore important to coordinate these activities and to ensure that the key messages are shared across all service and outreach teams in the GÉANT project, as they are responsible for engagement activities at various levels.

The outreach teams in the user and stakeholder engagement tasks, WP1 T6 and WP3, are the front line of service promotion to the prospective customers. The service owners are responsible for correctly identifying target groups and to support the outreach team by providing them with the knowledge, training and material needed for outreach. Where more specialised and technical engagement is needed, this is conducted by the respective WP5 service teams. The diagram below shows WP5 and WP3's different types of interactions regarding communication messages. Although not listed, the same structure would apply for WP1 T6.
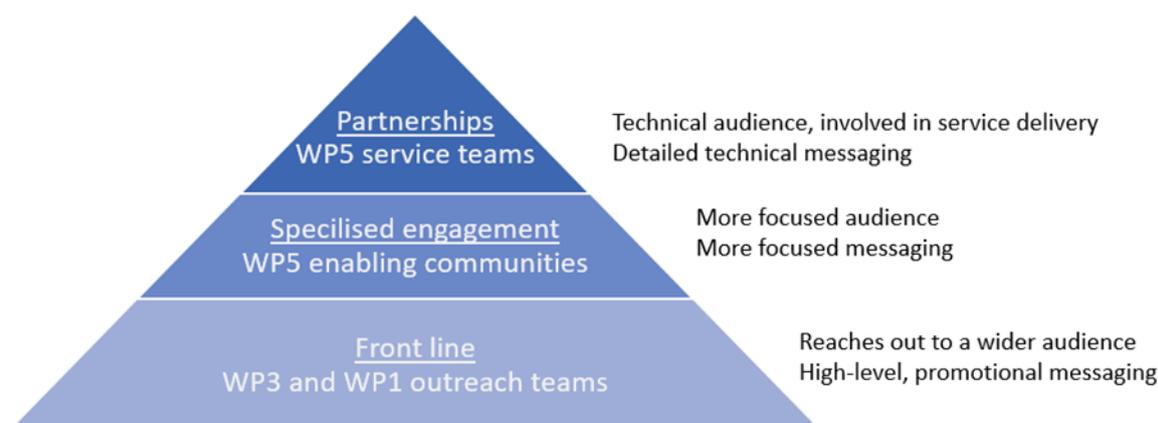

Figure 3.1: Outreach and service teams engagement structure

The leads that the front-line outreach teams develop are then handed over to the respective service team to scope, design, implement and deliver a solution. Information flow between the service team and the outreach team must be bidirectional. To ensure an effective communication flow and proper engagement of the outreach team that follows the strategic goals of each service team, members of the Enabling Communities team are directly embedded and fully integrated in the service teams working with the service owners in executing the outreach plans. In coordination with the service owners, the embedded outreach person(s) in each service team will be responsible for feeding back information to the global or European partner account manager or research organisation account manager.

Figure 3.2 represents the flow of leads/opportunities information from the outreach tasks to WP5. Leads are also often developed by members of the WP5 service teams due to the close relationship they tend to develop with the technical communities around the respective services. However, these leads are not depicted for the sake of brevity. The Incubator task in WP5 T2 is also included, as this task serves as a hotbed for potential future services within the T&I work package. This task will never run services but will have an outreach aspect, working closely with specific communities during (typically) 6-month cycles to advance Trust and Identity innovation.
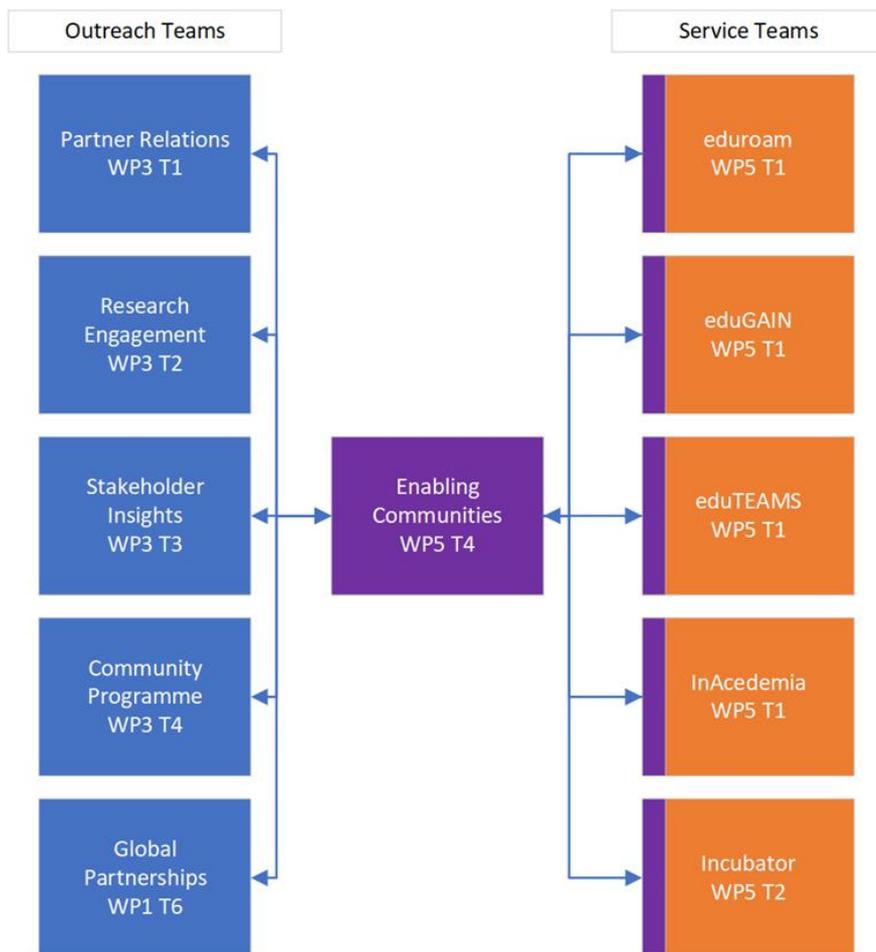

Figure 3.2: Flow of opportunities/leads from outreach tasks to Trust and Identity service tasks

The outreach teams engage with user groups following a general outreach plan but may also engage in more targeted outreach activities. These targeted activities are organised and planned in coordination with the service owners and WP5 leaders.

The information on leads and their respective status provided by the different teams involved in outreach will be collected by WP5 T4 and shared with the various teams involved internally, until a project-wide CRM becomes available. It is the responsibility of each outreach team to manage their own information source.

WP5 will produce a service description for each of the T&I services, which will be published via a page on the intranet or the wiki. It will include details provided by the service owners on the key elements of the service, describe the target audiences and the tools available for each of the services covered by Work Package 5.

An example of the type of information that will be produced can be found in Appendix A.

4 WP5 Engagement Plan 2019-2020

The following objectives are outlined for the purposes of the WP5 engagement plan for 2019-2020, with the intention of being completed by November 2019:

- Create a living list with information about each T&I service aligned with the example provided in Appendix A. This list will be for the use of the outreach teams, and it will include information such as:
  - Service description.
  - Service owner contact information.
  - High level technical deployment information.
  - Target audience and outreach approach.
  - Cost of service adoption.
  - Outreach material resources.

- Create a living list of the targeted communities. This list will be used as an information source for specialised T&I outreach.

- Set up a coordination and information sharing document which lists links to the various outreach teams' main sources of information, in cooperation with outreach teams.

- Formalise the assignment of staff to roles in the Enabling Communities task, ensuring that specific service areas are covered and outreach teams informed as required.

- Support and attend the AEGIS group.

- Support communities such as FIM4R, FIM4L and other communities

- Provide training to outreach teams on T&I services that are relevant to their team.

- Produce two slides per product area, endorsed by the respective service owners, for use in the generic GÉANT presentation used by outreach teams and for wider purposes, together with a list of further relevant and up-to-date information.

- Identify and produce the required outreach material in cooperation with outreach and marketing teams. For example, an A4 or A5 handout that provides more technically focused information for a service target user group, to aid with the adoption of the service. This material can then be used by the outreach teams to generate leads.

- Attend the relevant global conferences in order to disseminate information and gather input (TNC, Internet2 Global Summit and TechEx).

Outreach teams should consider the information provided below as the de facto objectives of the various services. However, the information should be regarded as a brief, which is to be updated when the service info-shares/training is made available and the respective development roadmaps have been formerly produced:

4.1 eduroam

Global and Partner Relations

Focus on wider adoption in nations which already have an eduroam national roaming operator and on adding countries that are not currently part of eduroam. The aim is to create a universal eduroam presence. Encourage NRENs that are not already part of eduroam to join. A 'train the trainer' approach is to be taken, focusing on training national roaming operators from multiple nations rather than organisations or institutes from within a county.

Research Engagement

Refer research institutes who are not using eduroam to the national roaming operator.

4.2 eduGAIN

Global and Partner Relations

Focus on wider adoption in the country and on adding countries that are not not currently part of eduGAIN. The aim is to create a universal eduGAIN presence. Encourage NRENs that are not already part of eduGAIN to join. Encourage NRENs that are members of eduGAIN to persuade their national institutions and research organisations to join eduGAIN via their national federation.

A train the trainer approach is to be taken. Identity federations should be encouraged to join REFEDS. Service providers (those offering services to researchers) should be directed to join their national federation operator and/or, if they have an international footprint, to contact the eduTEAMS team. The general model is that Service Providers cannot join eduGAIN directly, but via an identity federation.

Research Engagement

NRENs are the target of eduGAIN outreach activities. Research organisations should be encouraged to join eduTEAMS. Service providers (those offering services to researchers) should be directed to join their national federation and/or if they have an international footprint to contact the eduTEAMS team.

4.3 eduTEAMS

Global and Partner Relations

Not currently applicable. Pan-European research organisations and infra-EOSC research clusters are the focus of eduTEAMS' outreach activities. NRENs should encourage their national institutions to join eduGAIN.

Research Engagement

Strong focus is needed on targeting the ESFRI Infra-EOSC research clusters and their supporting e-infrastructures. Any communities that collaborate virtually and have a requirement for a login to their community website or a service portal that their community uses should be targeted.

4.4 InAcademia

Global and Partner Relations

Raise awareness (e.g. of the service not yet being production-ready but having potential for the future). Target global and European NRENs to adopt InAcademia SP in their federation.

Research Engagement

Research engagement to promote non-chargeable version to their communities.

The InAcademia team would like outreach teams to consider the product when talking to commercial organisations (Google, Amazon etc.) to generate leads for them. Leads would need to be fed back to the InAcademia Business Development Manager for pre-sales work.

4.5 Incubator Task

Global and Partner Relations

Raise awareness of incubator results in European and Global NRENs every 6 months.

Research Engagement

Raise awareness of incubator results in contacts every 6 months. Feedback any new T&I developments that your teams discover to the service owner.

5 Conclusions

Every service within the GN4-3 Work Package 5 area has its own specific end user group that is targeted for the adoption of the respective service. As such, a one-size fits all approach cannot match the outreach requirements of each service.

A living information page will be produced to provide an overview of each service and its supporting services, so that outreach teams have the information they require readily available. To bring the outreach team up to speed, training will be provided.

For each generic service, a short slide overview of the service will be produced to compliment the living list. This will be coordinated with the service owners with assistance of the marketing and communications team where necessary. Each service is encouraged to have a handout which describes the services in more technical detail, to aid service adoption in the targeted user groups.

Appendix A eduTEAMS

eduTEAMS is an Authentication Authorisation Infrastructure (AAI) for research collaborations. Currently, eduTEAMS is targeting research organisations, research collaborations and research infrastructures. eduTEAMS is an implementation of the AARC blueprint architecture (ARRC BPA) and addresses many of the requirements put forward by research communities in the FIM4R papers. This service enables research communities and research infrastructure to access and share services and other electronic resources using accounts from federated (eduGAIN-enabled) institutions, and social identities such as Facebook, Google and ORCID. eduTEAMS provides a central place where the community can manage its membership and the connection to services available from community member organisations, eduGAIN, the European Open Science Cloud etc.

Service Status	Production
Service Owner	Christos Kanellopoulos
Service description	https://www.eduteams.org
Technical Deployment method	Delivered as a service operated by GÉANT. It is a full implementation of the AARC Blueprint Architecture (BPA). (https://wiki.geant.org/display/eduTEAMS/What+is+eduTEAMS). Includes a proxy and identity hub, discovery service (DS), metadata service (MDS) and membership management service (MMS). A research community would manage their users and integrate their services via the eduTEAMS management portal.
Available for Global Partners	No
Available for European Partners	No (except those pilots which are taking place).
Available for Research Organisations	Yes
Available for Research Projects	Yes
Cost of service adoption	Costs are determined by scoping the requirement per community which is determined by the service team. The current proposal is to fund eduTEAMS pilots for research communities via the GÉANT project. Shared, dedicated and bespoke production services are on offer. A shared service would be free to use but would have eduTEAMS branding and certain restrictions. Larger research collaborations would be encouraged to use eduTEAMS Dedicated, as this allows research community branding. This dedicated service would be chargeable. The bespoke service would also be

	chargeable on a case by case basis.
Training for outreach teams	None currently but available on request.
Outreach Material	eduTEAMS standard presentation – Under preparation.
Example Communities	ESFRI-EOSC Clusters, Pan-European research communities.
Focus for outreach teams	**Global Partners** – Raise Awareness. **Partner Relations** – Not currently applicable. **Research Engagement** - Strong focus needed on targeting the ESFRI Infra-EOSC research clusters and their supporting e-infrastructures. Any communities that collaborate virtually and have a requirement for a login to their community website or a service portal that their community uses should be targeted.

Table A.1: eduTEAMS information example

Glossary

AAI	Authentication Authorisation Infrastructure
AARC	Authentication and Authorisation for Research and Collaboration
AEGIS	AARC Engagement Group for Infrastructures
BPA	Blueprint Architecture
CIO	Chief Information Officer
CRM	Customer Relationship Management
CTO	Chief Technology Officer
DS	Discovery Service
EOSC	European Open Science Cloud
FaaS	Federation as a service
FIM4L	Federated Identity Management for Libraries
FIM4R	Federated Identity Management for Research
MDS	Metadata Service
MMS	Membership Management Service
REFEDS	Research and Education FEDerations
T&I	Trust and Identity