

0 Table of contents

1	INTRODUCTION.....	3
1.1	BACKGROUND.....	3
1.2	THE SPOT-ON PROJECT.....	3
1.2.1	<i>Objectives of Service of the SPOT-ON project.....</i>	3
1.2.2	<i>Service Vision & Approach.....</i>	4
2	SCIENTIFIC AND/OR TECHNICAL QUALITY, RELEVANT TO THE TOPICS ADDRESSED BY THE CALL.....	5
2.1	CONCEPT AND OBJECTIVES.....	5
2.2	CONTRIBUTION TO THE CO-ORDINATION OF HIGH QUALITY RESEARCH.....	6
2.3	QUALITY AND EFFECTIVENESS OF THE CO-ORDINATION MECHANISMS, AND ASSOCIATED WORK PLAN.....	7
2.3.1	<i>Table 1.3 a: Work package list.....</i>	8
2.3.2	<i>Table 1.3 b: Deliverables List.....</i>	9
2.3.3	<i>Table 1.3 c: List of milestones.....</i>	10
2.3.4	<i>Table 1.3 d: Work package description.....</i>	13
2.3.5	<i>Table 1.3 e: Summary of staff effort.....</i>	20
3	IMPLEMENTATION.....	21
3.1	MANAGEMENT STRUCTURE AND PROCEDURES.....	21
3.1.1	<i>Management and competence of the participants.....</i>	21
3.1.2	<i>Quality assurance.....</i>	22
3.1.3	<i>Experience.....</i>	24
3.2	INDIVIDUAL PARTICIPANTS.....	24
3.2.1	.....	24
3.2.2	.....	25
3.2.3	.....	26
3.2.4	.....	27
3.2.5	.....	27
3.3	CONSORTIUM AS A WHOLE.....	28
3.4	RESOURCES TO BE COMMITTED.....	30
4	IMPACT.....	32
4.1	EXPECTED IMPACTS LISTED IN THE WORK PROGRAMME.....	32
4.2	COLLABORATIVE ARRANGEMENTS AND LONG-TERM SUSTAINABILITY.....	32
4.3	EXPECTED IMPACTS FROM SERVICE ACTIVITIES.....	32
4.4	EXPECTED IMPACTS LISTED IN THE WORK PROGRAMME.....	32
4.4.1	<i>Impacts on the NREN community.....</i>	33
4.4.2	<i>The European dimension.....</i>	33
4.5	DISSEMINATION AND IPR MANAGEMENT.....	33
4.5.1	<i>Dissemination and exploitation.....</i>	33
4.5.2	<i>Management of IPR.....</i>	33
5	ETHICS ISSUES.....	34

1 Introduction

1.1 Background

Procurement is emerging as a very significant function within the European Research & Education (R&E) Community. National Research and Educational Networks (NRENs) provide advanced communication services for universities, research labs and higher education schools. There are about 40 NRENS in Europe. For every NREN, procurement is a vital and integral part of delivering telecommunication services to the national R&E community. The scope of the NREN services tends to encompass a broad range of offerings such as ICT hardware, software and consulting services. For instance, today's portfolio of many NRENs includes "Software Licensing agreements for Education", "Cloud Storage", "Cloud Computing", "High Performance Computing", "Hosting" and "Mobile Services".

In addition, NRENs are taking on more assignments by procuring goods and services on behalf of their clients. There is a huge potential for savings by combining the purchasing power of larger entities, especially when dealing with the large, multinational corporations that produce most IT hardware, software and services.

1.2 The SPOT-ON project

The SPOT-ON initiative befits the trend towards increased cooperation and coordination of ICT procurement, and the potential to share work across Europe. The SPOT-ON initiative effectively prevents duplication of work, improves optimised use of national resources and supports to leverage the commercial sector for the benefit of the R&E community.

Vendors also see advantages in aggregated (framework) procurements from NRENs, as this will reduce their work on multiple (similar) procurement processes. Furthermore, a need is felt to level market power between the very large commercial ICT players (Google, Amazon, Microsoft, Apple, Samsung etc.) and their European customers in the Educational area.

At the same time, recognition of the important role of SMEs in innovation challenges NRENs to open up their procurement for smaller providers. Thus, procurement processes need to be arranged in a smarter way, as to differentiate innovative smaller projects from large scale ready-made products and services.

The SPOT-ON project envisages to develop a Smart Procurement Approach for the European R&E community, to be implemented on a new European R&E Procurement Portal. This proposal sets out the vision of a resource to be used by procurement personnel in each NREN and associated research and education institutions. They will use this procurement resource for the benefit of their stakeholders, to foster best practice, share knowledge and explore pan-European initiatives that will achieve economies of scale and savings across the community.

1.2.1 Objectives of Service of the SPOT-ON project

The objectives of this initiative are

- Implement an operational platform that will support procurement in the research and education (R&E) community throughout Europe
- The platform will operate and promote collaboration within the community to deliver value for money and optimise procurement resources
- The delivery of a "portal" that will contain content for use by the R&E procurement community, thereby creating an "Research & Education Procurement social community network".

- Establish a framework of shared best practice in this field over a wide variety of propositions that will benefit the Research and Educational community.
- Disseminate the results of this initiative as a model for other sectors like Healthcare or Public Sector procurement.
- Leverage specialist resources in procurement and ICT research that can be shared in an effective manner.
- Engage the market in a consistent and strategic manner to achieve the best and most innovative solutions for the R&E sector in Europe.

1.2.2 Service Vision & Approach

It is envisaged that the portal be operated by a dedicated team. This portal operating team will be governed by a Steering Group from the participating NREN partners. Initially, partners are stakeholders who contribute to the definition of the proposal and who invest time to get the initiative up and running.

This dedicated Portal Team will be responsible for the promotion of the services amongst the community to foster its use and involvement. The team will also engage more NREN partners and end-users (procurement officers) to contribute to the creation of content to be used by the wider community. Content on the platform will be broad by nature: documents, video, pod cast, blogs, presentations etc. Part of the Portal Team's responsibility is design, build and operation of a secure and centralised ICT solution to act as repository of all information to sustain collaboration. The team shall utilise existing identity federations to ensure the portal is secure but widely available to the community.

The European R&E Procurement Portal will support in the region of 30 NRENs. It is envisaged that in the first year of operation it will sign up 10 participating NRENs. Consideration needs to be placed on the language of the content. If content will be presented in a variety of languages, this could lead to an increase in cost/effort for all concerned. For the same reason, it is envisaged that the legal regulations will reflect European law only, and that local/national jurisdiction issues be managed at the national level.

The team will facilitate the creation of best practice strategies, and white papers. It also will develop tender templates & best practices papers on a variety of propositions. These could include:

- High Performance Computing;
- Data Centre Hosting & Operation
- Cloud Computing
- Mobile Computing

The team will be responsible for scheduling which propositions will be dealt with over the course of the year and engaging members of the broader community to contribute and maintain these documents. The development of each of these propositions shall be managed as a project.

2 Scientific and/or technical quality, relevant to the topics addressed by the call

2.1 Concept and objectives

In Europe, 40 National Research and Education Networks (NRENs) provide advanced communications to the research and education community in their country. In today's era of e-science, those communications networks form the basis for innovation in science and technology. Therefore, the NRENs' procurement is in the interest of achieving scientific and technological resources effectively at lowest possible cost.

Procurement and Purchasing require specialised knowledge (legal, procurements rules, decision making etc.) and are a time consuming activity that warrants greater resource as the scale and potential investment expands with the changing scope of the NREN over time.

However, great differences exist among NRENs, the most innovative operating at the leading edge of technology innovation, whereas others' technological basis is considered rather aged.

The SPOT-ON project aims to bridge this European digital divide in Research and Education (R&E) by sharing skills and expertise in procurement among R&E communities throughout Europe. Moreover, empowering European procurement in R&E will benefit all NRENs, matured as well as embryonic.

Figure 1 presents the dependency of science and technology on well performing NRENs: the network is the only irreplaceable resource of the primary process of R&E.

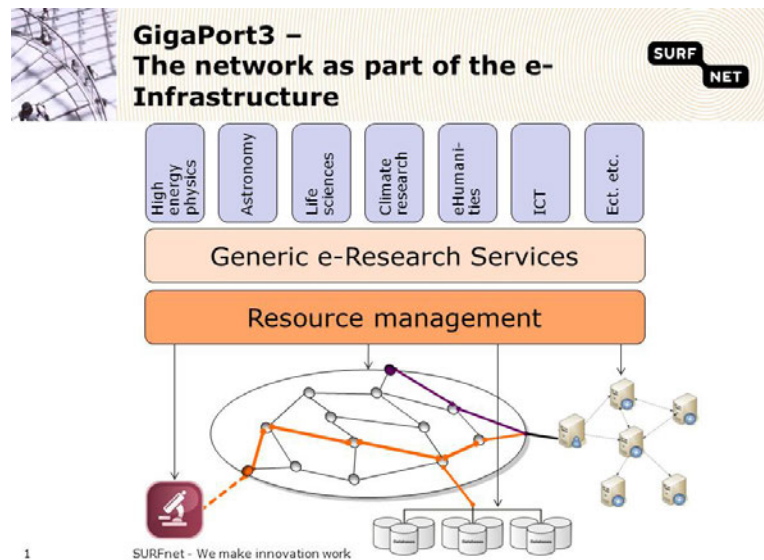


Figure 1 - Central role of NREN

Out of this central position, the operating scope of NRENs is broadening from communications network services to adjacent services like storage, collaboration facilities, cloud computing services and more; in short, the full range of software, hardware and information technology services.

A professional NREN procurement process proves beneficial for the NREN customers: universities, research labs and higher education institutions. Knowledge and expertise resulting from the SPOT-ON project will serve the entire European research and education community.

The scope of procurement of the NRENs is moving beyond the normal procurement of the traditional propositions like telecommunications equipment and services, to encompass a broader range of offerings like ICT hardware, software and consulting services. Examples of these are “Software Licensing agreements for Education”, “Cloud Storage”, “Cloud Computing”, “High Performance Computing”, “Hosting” and “Mobile Services” to name a few.

So, complexity and volume of work in ICT tender processes are increasing, along with the implied legal risks. The drive towards aggregating purchasing needs of the entire educational sector through the NRENs is leading to greater demand for their participation and leadership in this area.

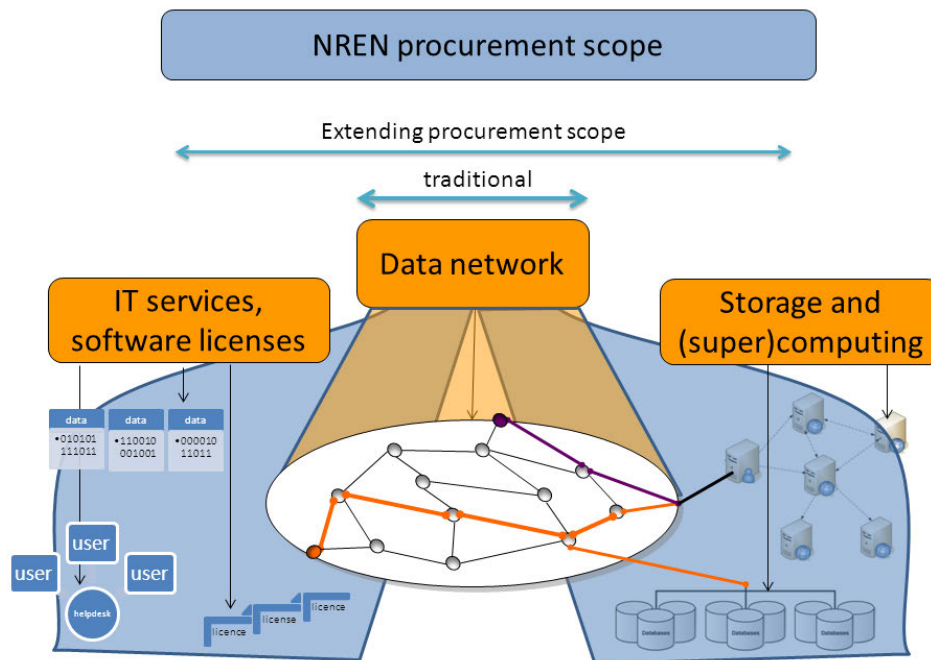


Figure 2 - Broadening scope of NRENs' procurement portfolios

The projected outcome of the SPOT-ON project is twofold:

- Increasing procurement efficiency for the entire European research & education community
- Innovating procurement processes and methods, specifically in R&E organisations with a less matured procurement practice, increasing knowledge dissemination by knowledge management.

In this project, the collaborating NRENs improve procurement practices that are already in place (e.g. by making them available to R&E partners all over Europe) and innovate procurement processes that are not yet matured, or even non-existent. The procurement pioneers among the European NRENs are determined to explore the edge of present knowledge in order to solve the difficult issues concerning cross-border procurement, regulation and privacy.

2.2 Contribution to the co-ordination of high quality research

The SPOT-ON project will improve both quality and effectiveness of hardware, software and IT services procurement of the European R&E community. As e-science rapidly gains importance over conventional research, the importance of research and education networks increases. Thus, European co-ordination of NRENs fosters European co-ordination of high quality research.

SPOT-ON is about sharing information and expertise among all European NRENs and beyond, to universities and research labs:

- Information about tenders planned to be issued by the individual NRENs, so that collaborative or co-operative tendering may be considered, resulting in better offerings against lower costs.
- Information about the results of tenders and evaluations of providers' performance.
- Expertise laid down in selection and evaluation models, scorecards and assessment models. NRENs entering a procurement project may retrieve these ready-to-use templates from a repository, instead of re-inventing the procurement wheel over and over again.

In 2010, the total amount of procurement by European NRENs is estimated to approach € 500 million, at a considerable cost for procurement officers, legal support and consultancy. It is envisaged that the procurement volume will roughly stay equal, albeit that significant more value will be supplied for those euros. Furthermore, the procurement costs will drop by at least 20% as a result of efficiency gain in the procurement processes.

As NRENs will perform their procurement in a coordinated manner, it is to be expected that also the communication networks themselves will show technological convergence in their evolution, resulting in better interoperability and more best-of-breed communication networks.

At the same time, as the European R&E community recognises the crucial role of small and medium-size enterprises in innovation, the SPOT-ON project will develop mechanisms to improve the presence of SMEs in the procurement arena.

2.3 Quality and effectiveness of the co-ordination mechanisms, and associated work plan

The work in SPOT-ON will cover three years, roughly to be divided into:

- Year 1: project set-up, organising the platform and information gathering
- Year 2: info analysis, problem solving and defining structures. Set-up of repository, NREN tender catalogue and SPOT-ON exchange platform
- Year 3: implementing solutions and dissemination.

Furthermore, in each year, training and improving procurement knowledge and skills will be a central focus of the work program.

The SPOT-ON implementation strategy builds upon a small forefront of well-established NRENs that document their experience, publish their procurement plans and open up their data on procurement projects to other NRENs and the entire research and education community of Europe, following the Open Data Strategy of the European Commission.

Other NRENs will be stimulated to join the forefront group and start publishing their procurement plans and documents on the platform. It is envisaged that the forefront NRENs will share knowledge and expertise with the newly joining NRENs, especially for those NRENs whose experience is limited to providing network services and who need to build up expertise in procurement processes and working with the schools and universities in their countries on joint procurements.

Also, the roll-out strategy of services on the European NRENs Procurement Platform will be phased, providing opportunities to test and improve services before assigning them a 'Best Practice' status. A continuous flow of carefully dosed news and services will tempt users to repeatedly visit the platform.

The intensity of collaboration will grow over the course of the project, starting with simply making available procurement documents in a repository and evolving into large collective procurement processes of several NRENS.

For attracting attention and dissemination of SPOT-ON services, existing services and platforms of the NRENS will be used, e.g. web conferencing, webinars, online video tutorials, Wiki, online collaboration software etcetera. Already nowadays, NRENS meet and exchange (technical) views and policies several times per year. These meetings will be used for spreading the news about the SPOT-ON initiative.

2.3.1 Table 1.3 a: Work package list

Work package No	Work package title	Type of activity	Lead participant No	Lead participant short name	Person-months	Start month	End month
WP1	Project management	MGT			20	1	36
WP2	Best practices	COORD			33	1	36
WP3	Internet Exchange Platform (IEP)	OTHER			29	1	36
WP4	Commercial & Legal Repository	COORD			24	1	36
WP5	Collaboration expansion	COORD			9	6	36
		TOTAL			115		

2.3.3 Table 1.3 c: List of milestones

Milestones are control points where decisions are needed with regard to the next stage of the project. For example, a milestone may occur when a major result has been achieved, if it’s successful attainment is required for the next phase of work. Another example would be a point when the consortium must decide which of several technologies to adopt for further development.

Milestone number	Milestone name	Work package(s) involved	Expected date ¹	Means of verification
M4.1	Repositories launched	4	3	Populated repositories
M1.1	Platform site online	1,2,3,4,5	3	Website public, test report available
M 3.1	SPOT-ON live open	3	3	Website, mgmt. report
M 3.2	SPOT-ON live restricted	3,5	4	Management reports
M4.2	Portal promo pack launched	4	6	Promo pack content published on-line
M4.3	Yearly Survey-Findings Report Published	4	10, 22, 34	Distributed report
M2.1	Best practice docs on IEP	2	10,15,22	Website, mgmt report
M2.2	Annual workshop of NREN IT-procurers	2	9, 21, 33	Management reports
M1.2	10 NRENs boarded	5	18	Management report
M2.3	Green IT procurement strategy on IEP	2	22	Website and management reports
M5.1	20th member of the platform joined	5	24	Management report
M1.3	Closing conference	1,2,3,4,5	34	Conference and proceedings
M1.4 M5.2	Project completed	1,2,3,4,5	36	Final report approved by EC

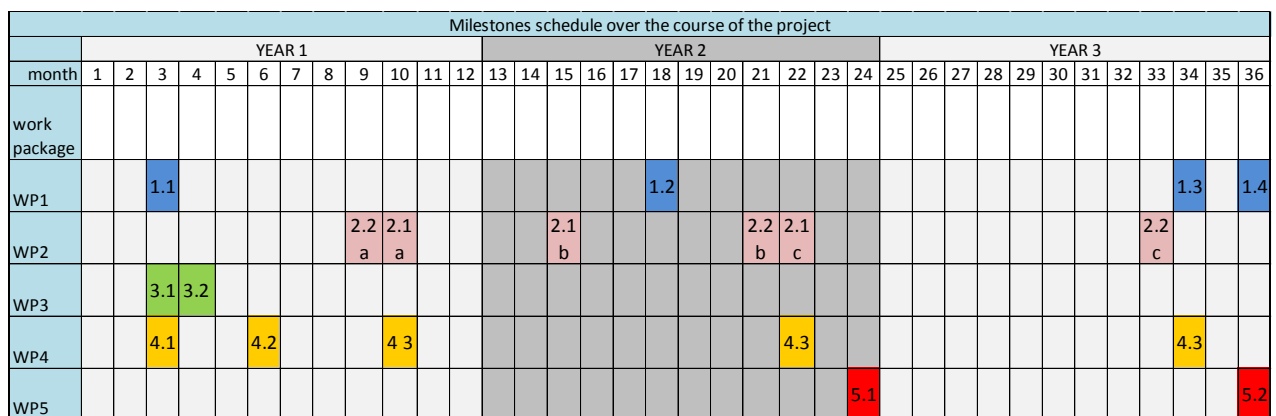


Figure 4 – mapping of milestones over project time

¹ Measured in months from the project start date (month 1).

Task scheme of the project																																					
month	YEAR 1												YEAR 2												YEAR 3												
	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31	32	33	34	35	36	
WP1 Deliverables			1.1								1.2												1.3												1.4		1.5
Task 1.1	initiate project																																				
Task 1.2	Milestones management																																				
Task 1.3	Regular reporting and EC liaison																																				
Task 1.4	Collaboration management																																				
WP2 Deliverables										2.2													2.2													2.2	
Task 2.1	Define procurement. categories																																				
Task 2.2	Short market analysis/category																																				
Task 2.3																																					
Task 2.4																																					
Task 2.5																																					
WP3 Deliverables																																					
Task 3.1	Site Creation																																				
Task 3.2	CEP																																				
Task 3.3	E-Distribution Lists																																				
Task 3.4																																					
T 3.5 (WS: workshop)																																					
WP4 Deliverables																																					
T4.1 (WG: work group)	Est. WGs & detailed plan																																				
Task 4.2	Training on Wiki Tool & Define and Develop Issues Registry																																				
Task 4.3	Launch & Comm. of Issues Registry & Contacts Registry in Portal																																				
Task 4.4	Review of related collateral research of each participating NREN																																				
Task 4.5	Frame & engage third parties to design and build survey for replication over three years																																				
Task 4.6	Maintain relevant & accurate Framework & Commercial Agreements Repository																																				
T4.7 (LCI: Legal & Commercial Issues)	Community Survey - L&CI																																				
T4.8 CR: Contacts Repository	Maintain NREN & Vendor CR																																				
WP5 Deliverables																																					
Task 5.1	Collaboration development and expansion																																				
Task 5.2	Information collection																																				
Task 5.3	Annual report																																				
Task 5.4	Final report																																				

Figure 5 – Gantt table of tasks and deliverables

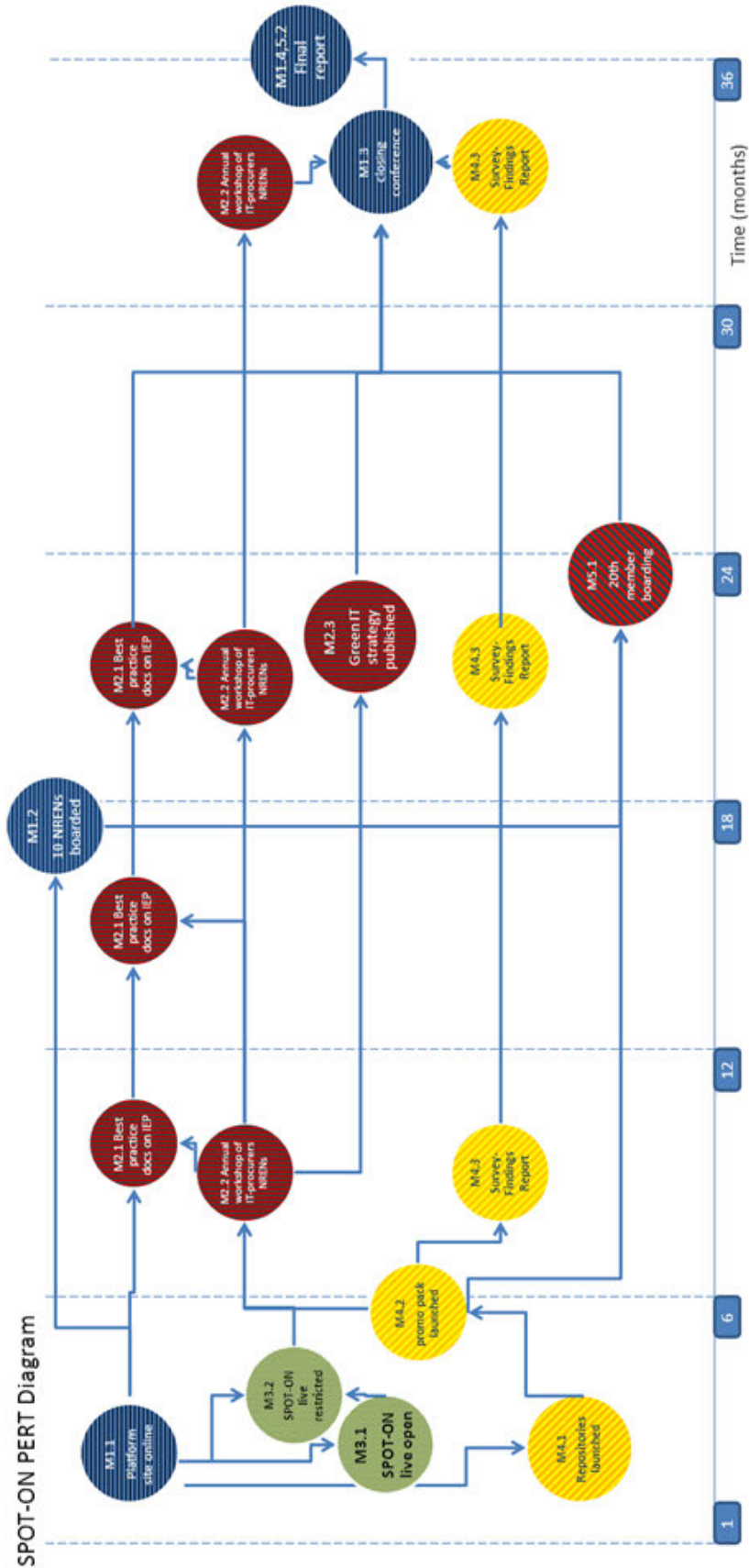


Figure 6 - PERT diagram of relations between milestones

2.3.4 Table 1.3 d: Work package description

Work package number	1	Start date or starting event:	Month 1
Work package title	Project management		
Activity Type	MGT		

Objectives

This Work Package is set up for the overall coordination of all the work packages of the SPOT-ON project. The overall project monitoring, management and progress reporting are part of this work package, as well as the liaison with the EC, the submission of deliverables to the EC and financial reporting (by the project participants via the coordinator to the EC)

Description of work in tasks and role of participants**T1.1** Initiating Work Packages.

Orchestrating the start of the work packages following project management principles. [REDACTED] will take the lead and will regularly consult the other participants.

T1.2 Milestone management

Monitoring and controlling the project execution so that potential problems can be identified in a timely manner and corrective action can be taken, when necessary, to control the execution of the project. Project performance is observed and measured regularly to identify variances from the project management plan. [REDACTED] will assign the project manager who will execute this task based on reporting from the WPs.

T1.3 Regular Reporting and EC liaison.

Regularly informing stakeholders on the actual progress of the project and its activities as described in the work packages. Also, progress reporting and financial accounting towards the Commission. The project manager will take responsibility, supported by SPOT-ON Secretariat, both to be provided by [REDACTED]

T1.4 Collaboration management

Overall steering of the Project and keeping track of the individual work packages of this project. Steering Committee of five initial participants, led by [REDACTED]

Deliverables**D1.1** Project plan – Month 3 – [REDACTED]

This deliverable will provide a detailed description of project tasks, their interrelations and time schedule. Furthermore, the resource planning and deliverables will be specified in depth, together with quality indicators and risk assessment.

D1.2 Progress report 1 – Month 12 – [REDACTED]

This deliverable will provide the EC with a reliable screenshot of the project status after the first year of execution. Deviations from the Project plan will be explained, as well as corrective measures taken. Also it will provide an update of the risk assessment.

D1.3 Progress report 2 – Month 24 – ██████████

This deliverable will provide the EC with a reliable screenshot of the project status after the second year of execution. Deviations from the Project plan will be explained, as well as corrective measures taken. Also it will provide an update of the risk assessment.

D1.4 Conference for EU R&E community – Month 34 – ██████████

This deliverable will offer an opportunity for all participants and other interested parties from the R&E community to discuss the outcome of the project and the continuation into an operational service for the R&E community. Proceedings and publicity will be used for dissemination of the project results.

D1.5 Final Report – Month 36 – ██████████

This deliverable will present the results of the project to the EC. It will report on the actions performed, the results achieved and the appreciation of the R&E community. Furthermore, it will account for the resources used.

Work package number	2	Start date or starting event:	Month 1
Work package title	Best Practices ICT procurement		
Activity Type	COORD		

Objectives

This WP will establish documents and templates, available to NRENs, R&E organisations, and the community of IT procurers at large. Further, it will bring less experienced procurers into a cooperation, expand their knowledge and increase the quality of their work. Having templates and good practice documents available to many organisations within the R&E sector, will lead to considerable reduction in time spent recreating the same requirements and criteria over and over again. It will also lead to standardised requirements that can bring further economies-of-scale in IT procurement, both at the demand side and at the bidders' side.

Description of work and role of participants**T2.1** Defining procurement categories

Determine which categories benefit most from collaboration and the establishment of good practice documents. ██████████ will take the lead and coordinate with the other partners.

T2.2 Short market analysis per category

Following the analysis in Task 2.1, ██████████ will coordinate an analysis of the competitive situation in the relevant categories, singling out low-competitive markets, which require special considerations in terms of best practice recommendations. This includes a section which covers Pre Commercial Procurement for Innovation steering and challenging the market players to act.

T2.3 Establishing 'Good Practice'-documents per category

TERENA will spearhead the collection of existing procurement documents from selected European NREN organisations. ██████████ will analyse documents for each category and develop a set of good practice recommendations per category.

This includes continually updating the templates and good practice documents, based on the input and discussions on the internet exchange platform in WP3. The work includes collecting existing procurement documents (list of requirements, scoring tables, etc.) from research networks and other European key public sector procurers; organising a working structure for peer reviews of the procurement practices between participating NRENs; establishing an overview of most important selection criteria per category and making scoring templates per category.

NRENs and other procuring organisations from specific countries or regions are eligible for investments from European Structural Funds (ESF). Particularly the European Regional Development Fund (ERDF) whose funding priorities include a/o modernizing economic structures and, research and innovation, may be of interest for less developed countries. In this task, good practices will be investigated for the use of ESF for advanced telecommunication infrastructure, resulting in the production of a guidance on better using structural funds to support and develop innovative public procurement.

T2.4 Ensuring green IT in procurement

Ensuring environmentally friendly production processes, low energy consumption and sustainability in IT procurement is often a challenge. Long value chains with a large number of sub-contractors often make 'Green IT' a difficult goal to strive for. Most of the production is done by large multinational corporations, and thus, overseeing such processes and ensuring compliance with green standards is more meaningful on a multinational level, rather than being handled uncoordinated and unilaterally.

██████████ together with the other NRENs will define important, quantifiable criteria per category and methods for overseeing and reporting compliance.

T2.5 Annual IT procurement workshop and training

Collaborating on IT procurement requires a community of procurers, set on working together. This requires a meeting to establish contacts and to inform of the ongoing work, and to stimulate participating organisations to participate in personnel exchange and/or joint training activities on innovative public procurement and pre-commercial procurement (PCP). This will help to facilitate further cooperation between public purchasers. This will in particular benefit the less developed NRENs and educational institutions, and contribute to the dissemination of good practices and good criteria for ensuring successful procurement. SURFnet will organise this annual SPOT-ON workshop.

Deliverables

D2.1 Good practice documents and templates – Month 12 – ██████████

This deliverable will provide a repository of good practice procurement documents and templates that will benefit the European NREN community, and also other public procurers of ICT, in particular the higher education sector (i.e. universities and university colleges).

D2.2 Annual workshop of NREN IT-procurers – Months 10-22-34 - ██████████

This deliverable will establish a meeting place for procurers of advanced IT solutions in Europe and will bring further cooperation between the parties involved. The event will be used to inform non-participating organisations of the work, inviting them to join the SPOT-ON community.

D2.3 Green IT procurement strategy – Month 22 – ██████████

This deliverable will provide a guideline for procurers regarding how to ensure Green IT in procurement, while both adhering to the directives and ensuring efficient competition.

Work package number	3	Start date or starting event:	Month 1
Work package title	Internet exchange platform (IEP)		
Activity Type	OTHER		

Objectives

The Internet Exchange Platform (IEP) will provide the public face of the project, as well as a secure area for consortium members to store research information and working documents.

Description of work and role of participants

T3.1 Website Creation & Maintenance

Within two months of the project start date, a dedicated website with its own domain name, clear design and logical structure will have been created. During the project this will be populated with information, news and links to appropriate off-site resources. The site will be professionally managed and supported through the whole project duration with the expectation that it will continue thereafter. [REDACTED] will take care of this task.

T3.2 Collaborative Exchange Platform

Within two months of the project start date a collaborative exchange platform will have been created. It will use a dedicated section on [REDACTED] production-level wiki, specifically tailored to the needs of the project. There will be a public area accessible without restriction for collection and distribution of public information. In addition there will be a separate private area for use by the project partners. [REDACTED] has practical experience in the use of federated access to protect resources, allowing access only to accredited users.

T3.3 E-mail Distribution Lists

TERENA will create and maintain e-mail distribution lists to support the project. These e-mail lists will include a list specifically targeted at NREN legal and procurement officers with the intention of engaging them in the work of the project. Lists will be made private or publicly visible and archived as appropriate. The project team will also use appropriate social media channels to promote the project and its achievements. [REDACTED]

T 3.4 Management executive newsletters

Each six months during the project an electronic newsletter for NRENs management executive level will be created and mailed out to the project mailing lists. The newsletter will carry articles and news from project partners and will be designed to be visually appealing. This task to be performed by [REDACTED]

T 3.5 Workshops

During the first year of the project, two workshops will be organised for NREN community members. These two workshops are primarily aimed at gathering information from the community and establishing community awareness and buy-in to the project. During years two and three of the project, another two workshops per year will be organized, supported by webinars, on-line discussions, surveys and videoconferences. The workshops in years two and three will be aimed at disseminating information, promoting the adoption of the platform and coaching in the use of the materials created. Also, the target audience will be extended to research and higher education sector procurement officers and management. Workshops will be organised by [REDACTED] with participation from the other project partners and third parties for workshop sessions.

All workshops in the project will be combined with project meetings, in order to keep travel budget within acceptable limits.

Deliverables

D3.1 Lively and informative website content on open platform – Month 3 – [REDACTED]

This deliverable will provide the first point of contact and a one-stop link to all project news and information. It will include an open collaborative exchange platform (such as a wiki) to offer community upload/download space for documents such as templates, best practice guides and other public documentation.

D3.2 Private platform for collaboration between project partners – Month 4 – [REDACTED]

This deliverable will provide with a restricted area (such as a wiki protected by federated access) accessible only by project partners, offering a secure area in which to jointly develop project material.

D3.3 Set-up of SPOT-ON newsletter series – Month 4 – [REDACTED]

This deliverable will provide a twice yearly electronic newsletter aimed at NREN Managers, procurement officers, legal staff and industry.

D3.4 Series of SPOT-ON workshop – Month 4 (first instance)– [REDACTED]

This deliverable will run two workshops each year, intermediately supported by webinars, discussion lists and videoconferences.

Work package number	4	Start date or starting event:	1
Work package title	Commercial & Legal Repository		
Activity Type	COORD		

Objectives

Provide consolidated picture of the legal & commercial issues that the NREN community are facing to drive fast and effective knowledge sharing and solutions. Maintain accurate Contacts, Framework/Agreements & Issues List for quick search facility in portal (IEP). Provide relevant reference material to assist in knowledge sharing and solution development. Enable the NRENs and their R&E communities to collaborate and resolve legal issues that relate to their projects & countries jurisdiction.

Description of work and role of participants

T4.1 Establish membership of working Group & contribute to detailed plan.

In order to map out the precise specification of the repositories and the continued the Commercial & Legal (C&L) co-ordinator will convene the working group (made up project participants) and then set out the plan to deliver these deliverables in line with the overall plan for spot-on.

The project participants will need to review the specification of the repositories and provide feedback to finalise. Furthermore the working group will review the draft “The Commercial & Legal Plan” which will include a definition of scope & deliverables, roles & responsibilities, communications plan, detailed delivery schedule and dependencies and assumptions.

It is assumed that the C&L Plan will be submitted to the Spot-on Steering Group for sign off by the C&L co-ordinator and will operate against this over the course of the project.

T4.2 Training on Wiki Tool & Definition, Development of Issues Registry

In order to effectively design the repository the and under the assumption that the C&L co-ordinator may not be skilled in the use and development of systems on Wiki and associated tools this task reflects the time needed to understand the tool and design the resources that need to be populated and distributed over time.

It is assumed that the development work will be iterative and built up over time. The C&L co-ordinator will require support from members of the WP3 team to achieve this.

T4.3 Launch & Communication of Issues-, Contacts- and Agreements Registries within the Portal

Once the Issues, Contacts and Agreements Registries are created then all participants and new members need to be made aware of this and how to contribute to it. The Registries needs to be launched and the content will be moderated and maintained. Once launched the WP leader will contribute to and QA the content to ensure it is well maintained and up to date. The new joiners of the SPOT-ON will be informed of the variety of information available and how to contribute to the portal.

T4.4 Review of related collateral research of each participating NREN

Once the Issues registry is created it will need to be populated by relevant and accurate information. As an on-going task the WP leader will review the collateral provided by the partners and participants of the SPOT-ON portal. This is anticipated to be an ad-hoc on demand activity over the course of the project. An input to this activity will be the output of T4.6 as details will emerge from the review of the frameworks that have been created and used by participants of SPOT-ON.

T4.5 Frame & engage third parties to design and build a survey for replication over three years

In order to provide a consolidated picture of the participating NRENs' view on the status of the procurement function and issues a yearly survey will be undertaken to form important part of planning for the year. The creation, publication and consolidation of findings will be conducted by the WP-leader.

As part of this work the WP-leader will seek the input of the portal participants in the definition of the survey before feedback is sought. Finally the WP-leader will select a third party to conduct this exercise on the part of the participants on a yearly basis.

T4.6 Maintain relevant & accurate Framework & Commercial Agreements Repository

Review legal & commercial submissions (from WP2 - good practice & collaboration). Categorise and update Repository. Consolidate issues on site with associated NREN members. Produce Quarterly Report to Steering Group. Contribute to Newsletter x 2 per annum. Present findings to yearly Workshop. The project participants will contribute on an on-going basis as they build good practice material per category and this material will be used by the WP-leader who will review the material and place it in the Agreements repository.

T4.7 Community Survey – Legal & Commercial Issues

Frame Yearly Survey. Issue Survey Questions via electronic tool. Consolidate Findings in the Legal & Commercials Findings Report. Publish findings to NREN community via the portal.

The survey itself will be submitted to all NREN's electronically with the assumption that an authoritative representative within the NREN will complete and return within a given timeframe. Once the results are completed and the report published, then the results of the survey can be used to assist in the planning, development of future procurement services and the resolution of any issues they may face over the course of the year.

T4.8 Maintain NREN & Vendor Contact Repository

Build and maintain Repository. Include NREN Name, Contact Details, Country, Details, Future Procurement Schedule. Include Vendor Name, Technical Category, Contact Details, Country, Products, Partners, Type.

Provide associated collateral as attachments – like “price plans” or “licence agreements” etcetera. Gather/Refresh details from yearly survey. Schedule yearly review with NREN participants to ensure plans.

Over the course of the project the WP-leader will proactively build and maintain a repository of contact details on the NREN participants and the vendors that the participating NRENS have engaged with. Over time this will provide a very powerful intelligence tool to enable the community to engage effectively with the vendors across Europe.

Deliverables

D4.1 Legal and commercial resources - Month 4 – ██████████

This deliverable will provide Legal & Commercial Issues , Contacts and Agreements Registries from 2012. These resources will be maintained on a continuous basis over the course of the project.

D4.2 Legal and commercial findings – Months 10, 22 and 34 – ██████████

This deliverable will provide three legal and commercial findings reports, including survey respondents and coverage, findings, conclusions, live agreements, issues summary by country and resolution, and contacts.

D4.3 Commercial & Legal Knowledge Transfer Pack – Month 4 – ██████████

As new participants join the project, and utilise the service the WP-leader will create a knowledge transfer pack to assist new members understand the C&L resources that are available and what shall be available over the course of the next three years. It is expected that this deliverable will be revised as new resources come on stream over the course of the project.

Work package number	5	Start date or starting event:	Month 6
Work package title	Collaboration expansion		
Activity Type	COORD		

Objectives

To build and maintain the community of NRENS/R&E procurement staff and to annually objectively measure the viability and realised savings with the aim to make adjustments during the course of the project, prove the added value and assure continuation (paid for by the members) after the initial 3 years.

Description of work and role of participants

T5.1 Collaboration development and expansion

SURFnet will invite other NRENS to participate in the platform, pointing out the benefits of a cooperative approach towards procurement. Sharing expertise and coaching the lesser experienced NRENS will bring coherence in procurement at a European level. The growth of the collaboration needs to be carefully managed in order to attract new members while keeping existing members eager to contribute.

T5.2 Information collection

Key stakeholders identified in WPs 2 and 3 or via the Steering Committee will be consulted as required throughout the year via interviews and workshops. Using web-questionnaires all procurement officers will be asked to evaluate the project annually. Key users and CFOs will be interviewed more in-depth using video conferences or face-to-face meetings (mostly) at existing NREN conferences.

Specific feedback will be sought on perceived savings regarding lower costs due to better specifications, lower costs due to larger (combined) procurement volume and cost saving due to less or no external (technical, legal or procurement) consultancy. Interviewees will also be asked to name any additions or changes which they deem an improvement to the project. The work will be carried out by [REDACTED]

T5.3 Annual report

An annual report will be created reflecting the achieved developments, achievements of the past year and projected changes for the coming year. Drafts of this report will be reviewed by the Steering Committee. A near final draft will be published as a formal Request for Comments document before the final report is published. The final report will be presented at the annual [REDACTED] conference which all NRENS attend and, during one of the project workshops. The work will be carried out by [REDACTED]

T5.4 Final report

The final report will be created with the intent to seek funding within the R&E community to continue this project after the initial 3 years. Obviously, this task will prove easier with a large number of contributing participants. The work will be carried out by SURFnet.

Deliverables**D5.1 Contribution to the annual progress report - Months 12 and 24 – [REDACTED]**

This deliverable will provide contributions to the two annual reports reflecting the achieved developments, achievements of the past year and projected changes for the coming year. For the sake of efficiency, this deliverable will be integrated with D1.1.

D5.2 SPOT-ON Platform with 20 members

This deliverable will provide an active community of at least 20 members from the European NRENS on the SPOT-ON platform, sharing expertise and procurement plans.

D5.3 Final Report

This deliverable will provide a final report that will look back at the project and will reflect the usage and savings over the three years period.

