

# FCCN – OCRE enablement & update

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# Why Cloud-based services?

European Commission promotes

- Digital Economy for Research
- Consume not Build (where possible)
- IaaS/PaaS underpins e-Infra services
- Sustainable EOSC (Core)
- Develop Startups and SMEs

## Green Regional Compute

Fewer Data Centers (energy consumption)

- ❖ Rate of Innovation (accelerating in Cloud)
- ❖ HPC supplementation (hyperscale compute)
- ❖ FAIR data (metadata creation and cold storage)
- ❖ EOSC White Labeled Commercial Services

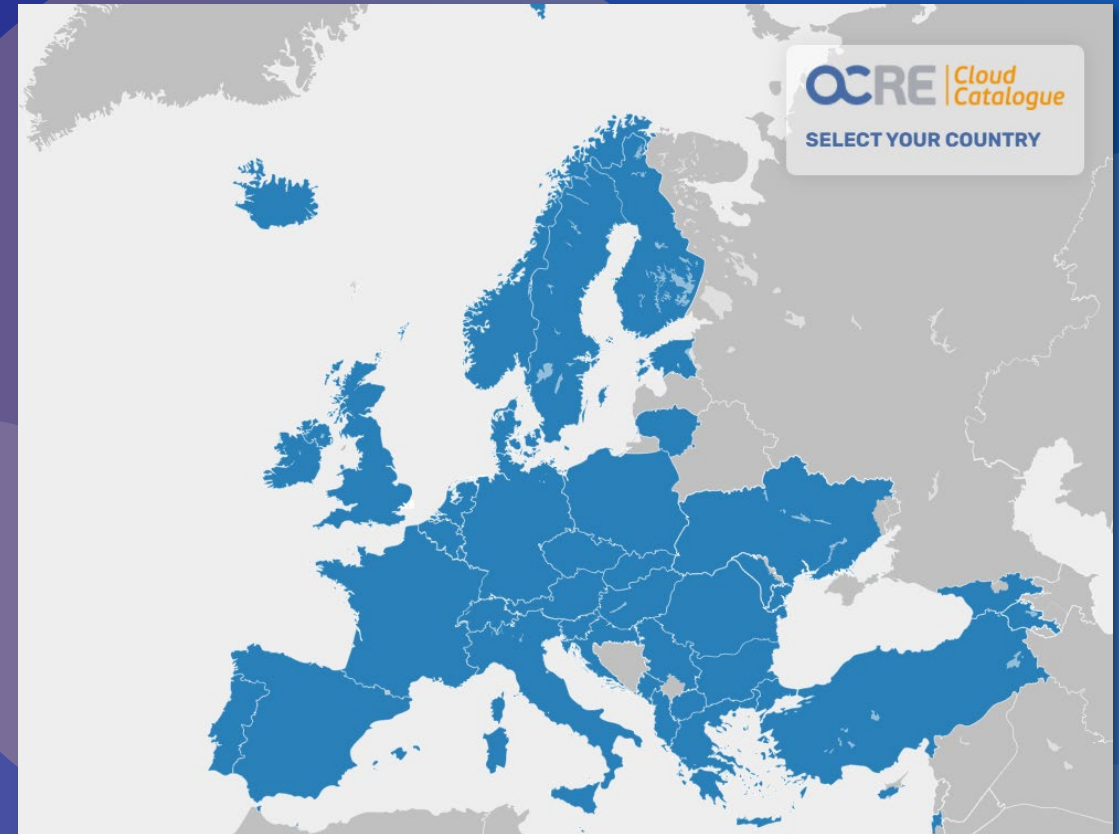


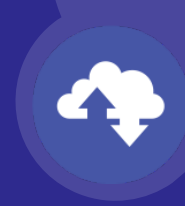
## GÉANT and the NRENS

- Catalogue of Cloud and Digital Services
- Develop relationships with market in-country
- Provide access to call-off agreements \*\*\***
- Support local cloud forums
- Evangelize services via conferences
- Host agreed upon supplier training
- Communicate funding calls for institutes
- Provide support for local buyer groups
- Report on local consumption trends**
- Drive strategy and relevance**

**NO** institute should run their own tenders \*\*\*

**OCRE** | Open Clouds  
for Research  
Environments





## Compliance

- ✓ Platform tested using HNSciCloud workload
- ✓ All suppliers bound by GDPR regulations
- ✓ In-country support and call-off



## Networks

- ❖ Peering POPs under review (GÉANT)
- ❖ Data ingress/egress waivers in place
- ❖ Cloud Interconnect/Expressroute/Direct Connect



## Trust, Identity and Security –

All platforms support SAML2/OIDC protocol  
eduGAIN onboarding (GÉANT federation)  
Supplier SOCs – threat surveillance and response



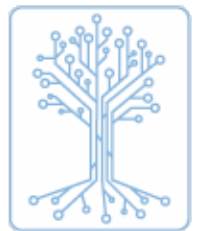
## Community support

- 3 annual supplier workshop commitment
- Additional discounting
- GÉANT WP4/CMG support



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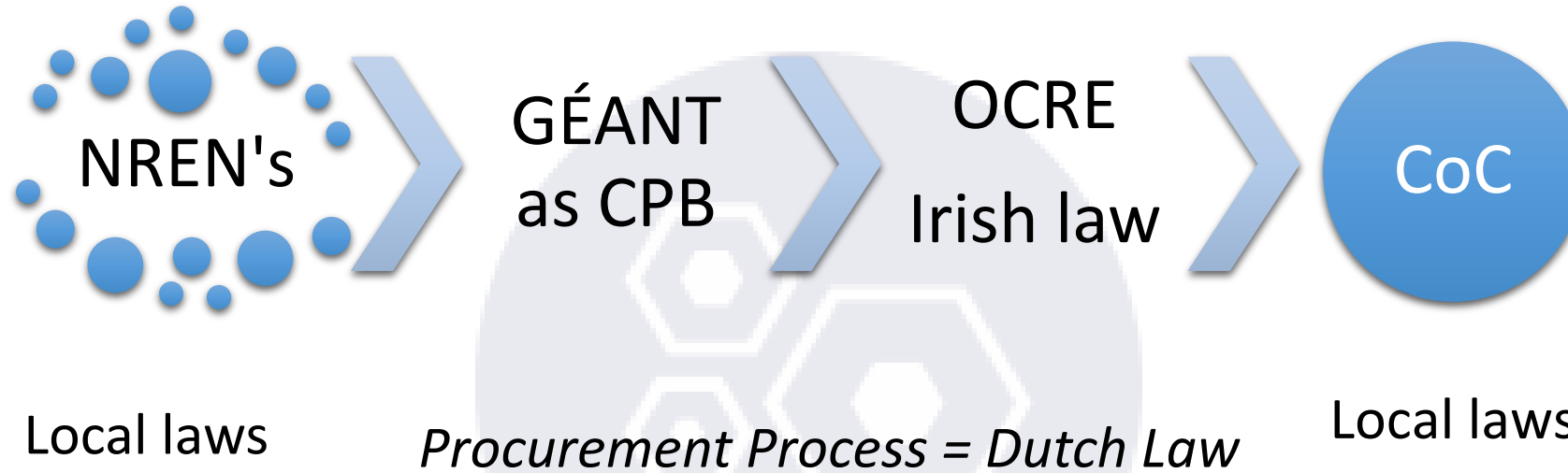
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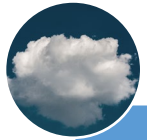
- ✓ Framework ITT honoured all guiding principles of the EU tendering law procured under Dutch tendering law
- ✓ Competition between resellers per lot within the Framework Contract
- ✓ Call of Contracts as result of a mini-competition or direct award between reseller and institute
- ✓ For EC funded projects Voucher Contracts are signed between GÉANT and reseller to be VAT and EC GA compliant
- ✓ Institutions responsible for scoring and awarding decision
- ✓ Direct award possible on conditions
- ✓ CMG supported dashboard in support of mini-competitions
- ✓ All Contracts completely aligned with EC GA and Dutch and EU VAT legislation
- ✓ NREN may facilitate relationships between supplier and local R&E community



just a procurement framework



# 3 OCRE Procurement Procedures



## Direct Award

- Not economically feasible
- Not available on other
- Licensing arrangements



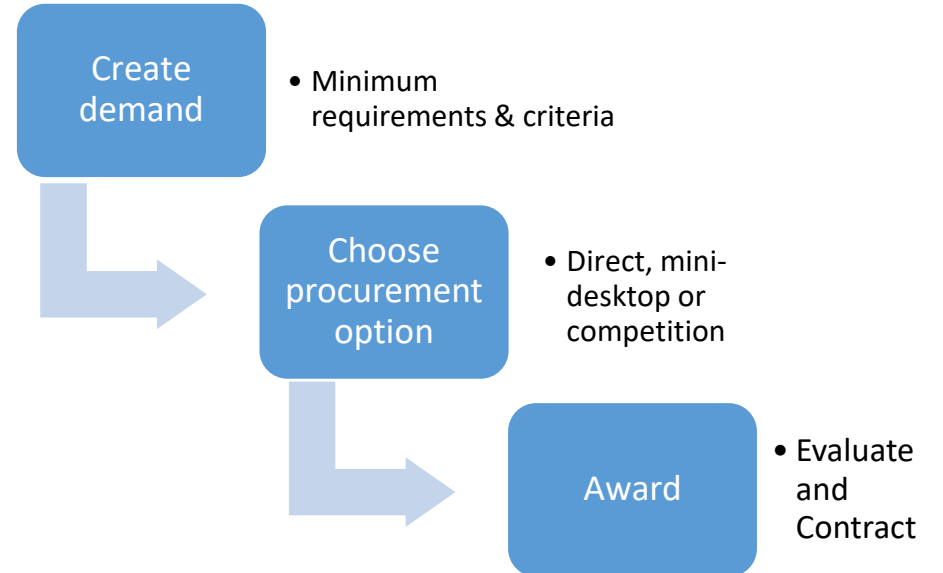
## Mini-desktop competition

- Evaluate all Suppliers in Lot
- Reuse GÉANT's awarding criteria and scores
- Use price Online Cost Calculators



## Mini-competition

- Invite all resellers in Lot
- Apply the award criteria
- Score – award – stand still period

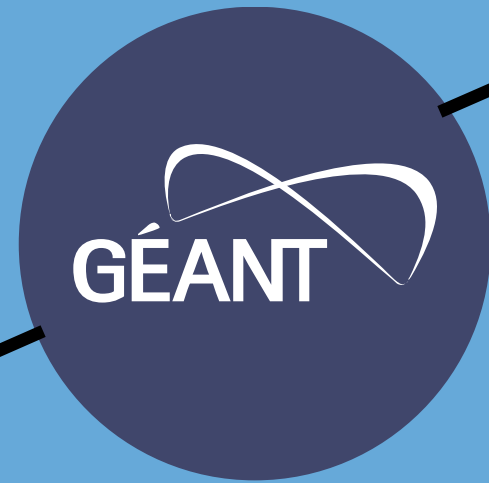


# OCRE EC Funding Procedure



OCRE OVK

Claims costs



NO additional Dutch VAT

Payment + VAT > Voucher

VAT payment

MoU & Voucher



Supplier

Consumption of Services



Institute





- 10 resellers in Portuguese lot
- <https://www.ocre-project.eu/services/cloud-suppliers/country/portugal>
- Growing interest and usage of OCRE:
  - Universidade Católica Portuguesa
  - IDEFE SA
  - Geant -Infraestrutura Nacional de Computação Distribuída - Lisboa, Portugal
  - Infraestrutura Nacional de Computação Distribuída
  - UTAD - Universidade de Trás-os-Montes e Alto Douro
  - Universidade Lusófona
  - Direção-Geral de Ensino Superior
  - Instituto Universitario de Lisboa
  - Instituto Politécnico do Porto
  - Nova SBE
  - DGES
- First EC funded mini-competition: cooperation between University Singidunum and COFAC / Lusofona University
- 4 Proposals received and Sparkle – Google Awarded



Provider/Researcher **COLLABORATION** \*

**BE CREATIVE** \*\*



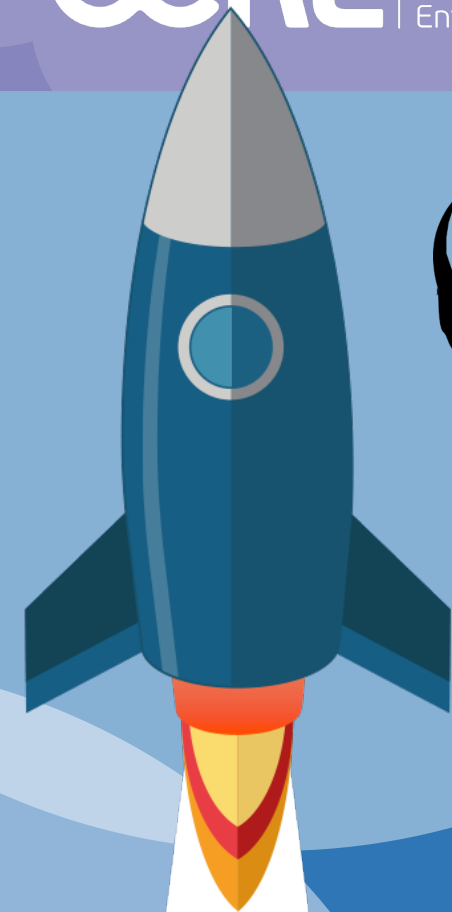
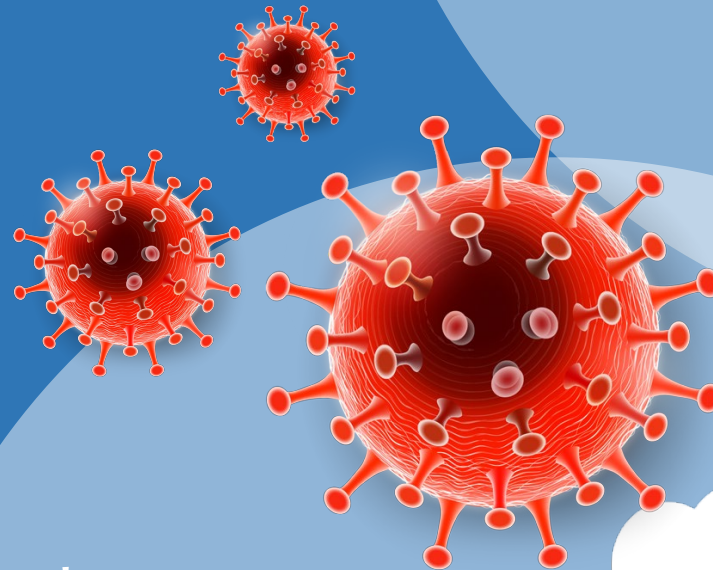
**OCRE** | Open Clouds  
for Research  
Environments

### Large projects (think BIG) -

- FAIR data outcomes (metadata; C/Storage)
- Scalable, sustainable HPC
- Algorithm development - ML/AI
- Regional collaborations
- Relevance

### EOSC opportunities –

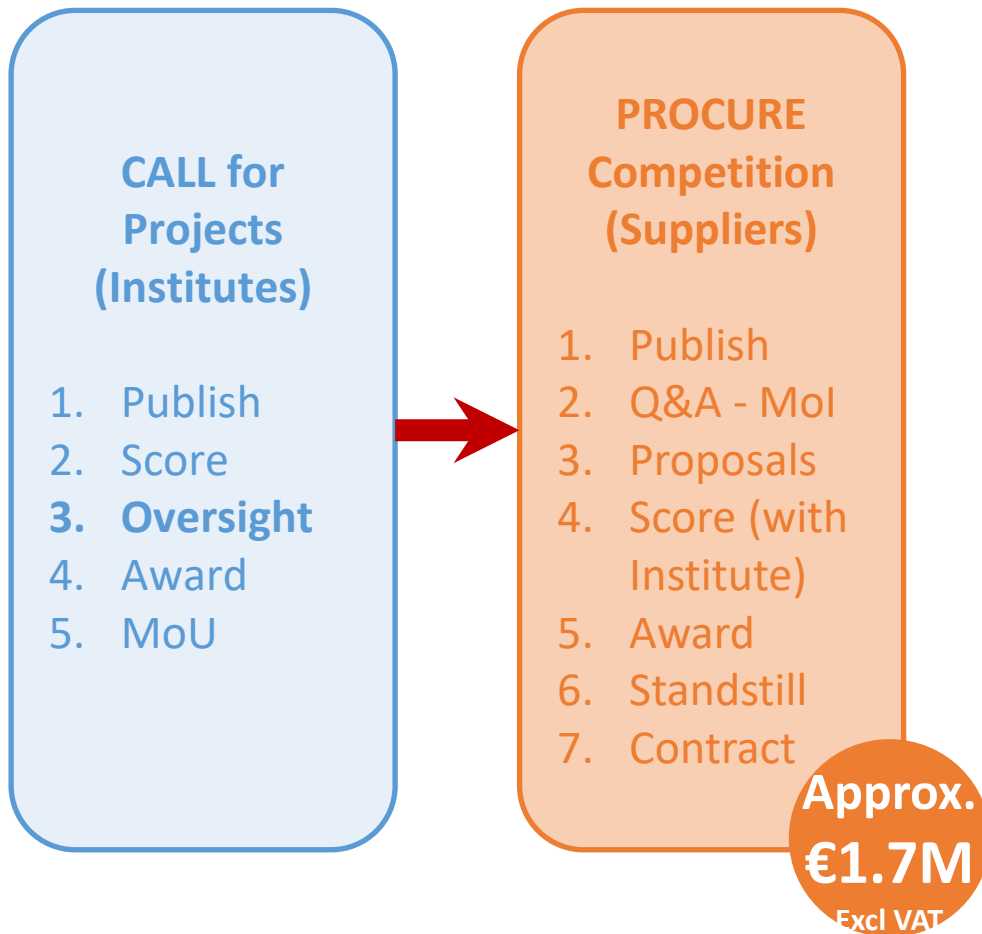
- ❖ Horizontal services
- ❖ EU Dataspaces and science
- ❖ Underpin bespoke research toolsets



**GO FAIR**



### Funding process 2020/2021



### Acceleration model 2022

(Cloud and EO)

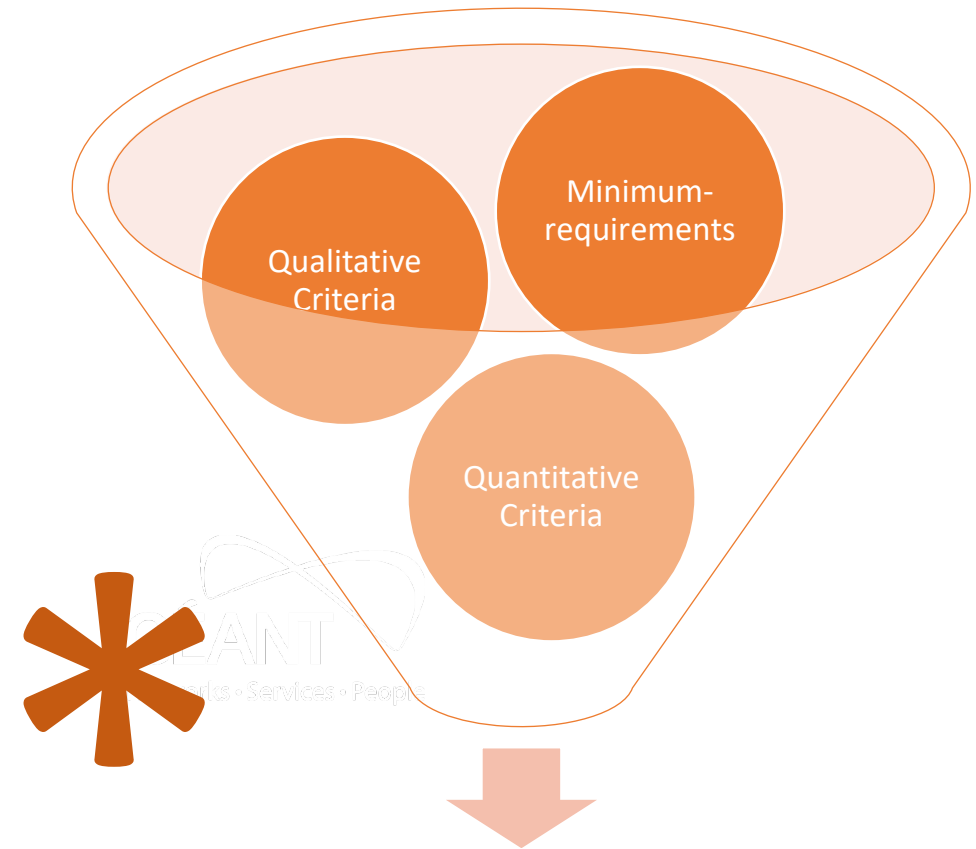
Remaining Adoption Budget





### General Principles –

1. **2in1** procurements driving adoption from two sides
2. introduce R&E community to Cloud Services suppliers in early stage
3. Invite supplier to pro-actively approach R&E community to search for projects
4. Professional market approach focused on R&E demand
5. Using procurements to connect market with R&E community
6. Frame R&E demand by using clear set minimum requirements & criteria
7. Twofold stimulation: market > EC fund < R&E institutions
8. Both supply as demand driven towards EU funding
9. Using stakeholders like NREN's & ESA - network for scaling-up projects to secure returns on investment
10. VAT regulations, EU directive and threshold compliance
11. OCRE framework to be used for Cloud procurements
12. EO services will be multiple/direct awards (below threshold) using OCRE catalogue of EO providers



**ADOPTION of Services**

# “BIG” Mini-competition within OCRE

## EC Funding for Proposals of research projects



**OCRE CLOUD services resellers** – be awarded up to €500,000- Driving Adoption of Cloud Services within EU & UK research projects- until remaining EC budget ceiling is completed (taken EO into account).

Minimum requirements like:

- Proven adoption of Cloud Services within research project(s)
- Representing Ethical research
- One proposal per awarded EU or UK lot – several projects possible
- No double funding
- Institutions support and on time input for EC report
- Usual mini-competition MR: Vouchers, VAT, Exit plan etc.

Awarding Criterium	Description	Weight (%)
1	Demonstrating the adoption and benefits of Cloud	40%
2	The project plan	20%
3	Sustainability	20%
4	Best value for money	20%

### Planning

- Published end April 2022
- MoI in May 2022
- Deadline submitting Proposals 7 July 2022
- Scoring and awarding July / August
- Sept 2022 standstill and start Projects
- Nov 2022 provide input for EC report



**Thank you!**

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- **Published on Tenders Electronic Daily (TED) on 15 April 2020**
- Closing date for submissions was extended to 23 June 2020, due to the COVID 19 crisis and delayed market response.
- LOT based – one supplier of each platform in each country (including hyperscale resellers \*\*).
- **Framework contracts signed in Q1 2021**
- **Awarded contracts made available via TED (publication of outcome) in August 2021**
- **Continuance EC adoption funded Projects throughout 2022**

- Market response to tender – 1100 bids
- Outcome - 473 cloud contracts across 40 lots
- 37 cloud platforms represented
- Minimum of 9 platforms per country
- Maximum 17 platforms per country
- **GÉANT WP4/CMG contract management**

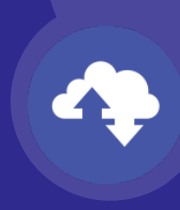


**40 NRENS (countries)**  
**10,000 Institutes**  
**2 Million Researchers**



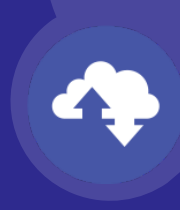
\*\* Competition amongst hyperscale resellers complete.





- Suppliers of Earth Observation services invited to register on the OCRE EO Catalogue
- First EO Tender published
- First 10 Cloud EC funded mini-competitions published on behalf of awarded institutes (15 in total)
- Suppliers engaged and informed through interactive info-sessions stimulating feedback
- Proposals received and evaluated by institutes - Awards
- Agreed upon project extension with EC





## COMPLIANT procurement on behalf of funding initiative

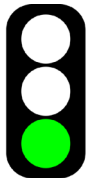
- GÉANT/partner must procure **vouchers** on behalf of institutes
- Voucher funding incurs VAT at point of consumption
- Dual VAT could occur for funding awards outside of the EU and UK

## RISK MITIGATION

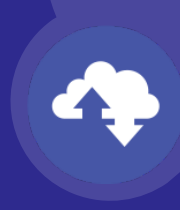
- ✓ EY VAT expert opinion has been sought and received, confirming proposed VAT treatment with least risk
- ✓ OCRE funding contracts have been drafted accordingly
- ✓ Confirmatory rulings from Dutch Tax Authority & EC eligibility

## MOVING FORWARD *(Tax ruling received – Imminent)*

- Complete procurement of vouchers for research projects in first calls
- Distribute remaining funding (via cluster projects/dataspaces and other **EOSC FUTURE** related activities)
- Build compelling case studies

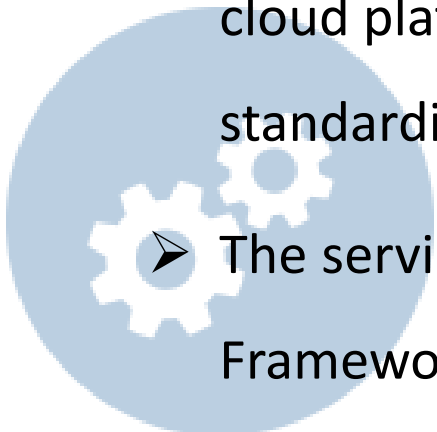


**EUROPEAN OPEN  
SCIENCE CLOUD**



## Option 1: Direct Award if:

- Switching to an entirely new platform is not economically feasible > An existing cloud platform or; > The partner organisation in the use case has already standardised on one platform.
- The service we wish to buy is not available on any other platforms on the Framework.
- The licensing arrangements around our existing platform mean that due to Intellectual Property rights we cannot switch to another provider.





## Option 2: Mini- Desktop competition if:

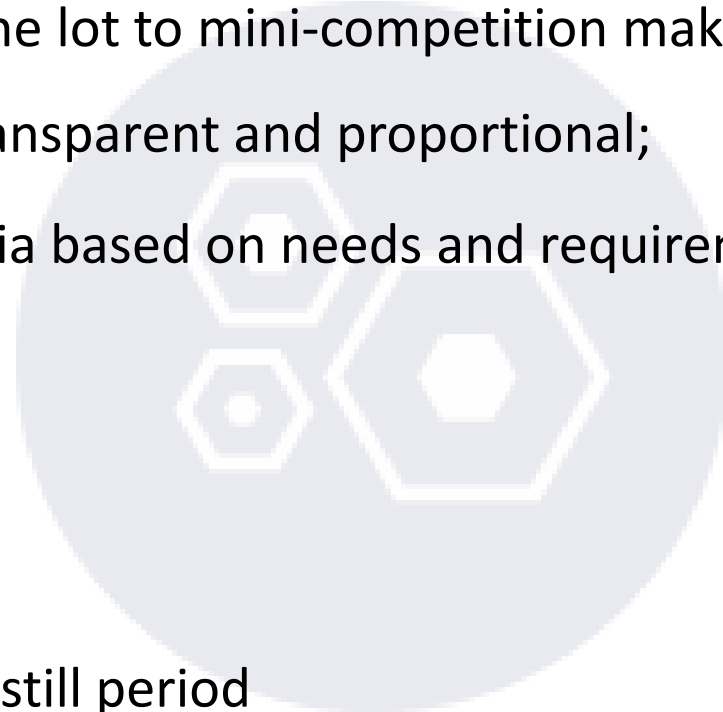
- Evaluate all Suppliers in its Lot.
  - Exception: if a Supplier is clearly unable to meet a specific requirement, this Supplier may be excluded (see direct award support tool for excluding Suppliers).
- Reuse GÉANT's scores against the offer of the Supplier for the following award criteria (ACs):
  - ○ AC1 – Service and Support
  - ○ AC2 – Marketing and Adoption Support
  - ○ AC3 – Exit Support
  - ○ AC7 - Sustainability
- Calculate new scores on Price with Online Cost Calculators:
  - ○ AC4 – Price. IaaS / PaaS / SaaS discount percentage applied to current prices.
  - ○ AC6 – Price. Additional Services.





### Option 3: Mini- competition:

- Invite all resellers in the lot to mini-competition making sure to create fair level playing field: equal, transparent and proportional;
- Apply the award criteria based on needs and requirements, for example:
  - Ideal Solution
  - Added Value
  - Pricing
- Score – award – stand still period
- Make an order and sign the call-off contract with awarded Reseller



# Process in steps

