

Work Package 3 „Cooperation“

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AMICI Second Annual Meeting

Salerno, 1_2019



Reminder: AMICI WP3 Objectives

The **overall goal** of this Work Package is to

- *define the **conditions of the coordination of Technology Infrastructures (TI)** in the area of accelerators and superconducting magnets*
- in order
 - *to **harmonize their operation and***
 - ***increase their efficiency,***
 - ***to adapt to the development of present and future European Research Infrastructures and***
 - ***establish a co-innovation platform with industry.***
- Eligibility criteria for the participation and networking of TIs will be investigated in detail, in order to
 - **finally propose an appropriate coordination model.**



Deliverables and Milestones

Deliverables

D3.1: Report defining the eligibility criteria for accessing to the core group of large TIs (M18).

D3.2: Report on the networking and coordination model (M30)

D3.3: Report about the proposed model of collaboration agreement (M30).

Milestones

M3.1: First version of the report on eligibility criteria (M9)

M3.2: First version of the report on Networking and Coordination Model (M12)

M3.3: Collection and analysis of existing bi- or multilateral agreements between AMICI members and with other partners (M18)

WP3.1: Definition of eligibility criteria

(CEA, DESY, INFN, CNRS)

	ELIGIBILITY CRITERIA FOR ACCESSING TO THE CORE GROUP OF LARGE TECHNOLOGY INFRASTRUCTURE	Deliverable: 3.1 Date: 30/09/2018
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Grant Agreement No: 731086

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DELIVERABLE REPORT

ELIGIBILITY CRITERIA FOR ACCESSING TO THE CORE GROUP OF LARGE TECHNOLOGY INFRASTRUCTURE DELIVERABLE: 3.1

Document identifier:	AMICI-D3.1-v3.0
Due date of deliverable:	End of Month 18 (June 2018)
Report release date:	30/09/2018
Work package:	WP3: Cooperation
Lead beneficiary:	CEA
Document status:	Final

Delivery Slip

	Name	Partner	Date
Authored by	O. Napoly [WP3.1 Task Leader]	CEA	20/09/2018
Reviewed by	H. Weise [WP3 Leader]	DESY	24/09/2018
Approved by	Steering Committee		26/09/2018

Task WP3.1, under the lead of CEA Saclay, investigated, identified and appropriately summarized the eligibility criteria for the envisaged network.

- Conditions of eligibility for an **accelerator or sc magnet European infrastructure** to be eligible in the core group of large European Technological Infrastructures were defined.
- The selection will be based on
 - **technical spread, accessibility, innovation and**
 - **industrial opportunity criteria**

WP3.1: Definition of eligibility criteria

2. ELIGIBILITY PRINCIPLE

The eligibility key principle is therefore the capacity and the willingness of the new Member to integrate itself in an organization of Technological Facilities that coordinate their efforts and their development towards the construction of future research infrastructures, and that are willing to provide access to their technical platforms (TP) to other partners and to industries. Several criteria can be used to assess this principle:


- 1) the TF record and future plans of contributions to the construction of Research Infrastructures, in collaboration with the existing TI (cf. Table of TP Occupancy),
- 2) the TF record and future plans of collaboration with industry,
- 3) the accessibility of the Technological Facility to partner and industry collaborators,
- 4) the operability of the platforms in terms of financial and human resources,
- 5) the adaptability and versatility of the Technological Facility to evolving technical needs.

Another crucial aspect is the capability of the new Member to reinforce the technical spread and the expertise of the existing Technology Infrastructure and hence contribute to more

	ELIGIBILITY CRITERIA FOR ACCESSING TO THE CORE GROUP OF LARGE TECHNOLOGY INFRASTRUCTURE	Deliverable: 3.1
		<i>Date: 30/09/2018</i>

4. CONCLUSION

Based on the above poll, all AMICI beneficiaries are indeed potential members of a future Technology Infrastructure organization. The next step towards establishing such a Technology Infrastructure requires answering the following questions:

- 
- 1) To which body our present AMICI collaboration should morph past 2019?
 - 2) Which status and rules should we propose for its core group?
 - 3) Which status and rules of association should we propose to industries and universities, European and non-European?

WP3 together with AMICI partners will act towards providing some elements of answers.

next steps → WP3 discussions



WP3.2: Networking and coordination model

(IFJ PAN, CEA, DESY)

- Organizations have a **networking relationship** when they **exchange information** in order to help each individual organization **do a better job**. Already the least amount of commitment and time from organizations can in itself have significant and positive results.
- Organizations have a **coordinating relationship** when they **modify** their **activities** so that together, they provide better services to their constituents. Coordination helps fill in the gaps and also helps prevent service duplication. A coordinating relationship requires more organizational involvement, time, and trust than a networking relationship.

All AMICI core group members are **integrated in collaborative efforts**, either project related or as a consequence of long-term R&D programs.

Thus **a networking relationship exists but AMICI will promote a more systematic analysis of how to improve the actual situation.**

WP3.2: Networking and coordination model

(IFJ PAN, CEA, DESY)



First version of the report on
networking and coordination model

Grant Agreement No: 731086

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MILESTONE REPORT

First version of the report on networking and coordination model

Milestone:	MS3.2
Document identifier:	AMICI-MS12-v3.26
Due date of deliverable:	End of Month 12 (December 2017)
Report release date:	December 15, 2017
Work package:	WP3: Cooperation
Lead beneficiary:	IFJ PAN
Document status:	Final

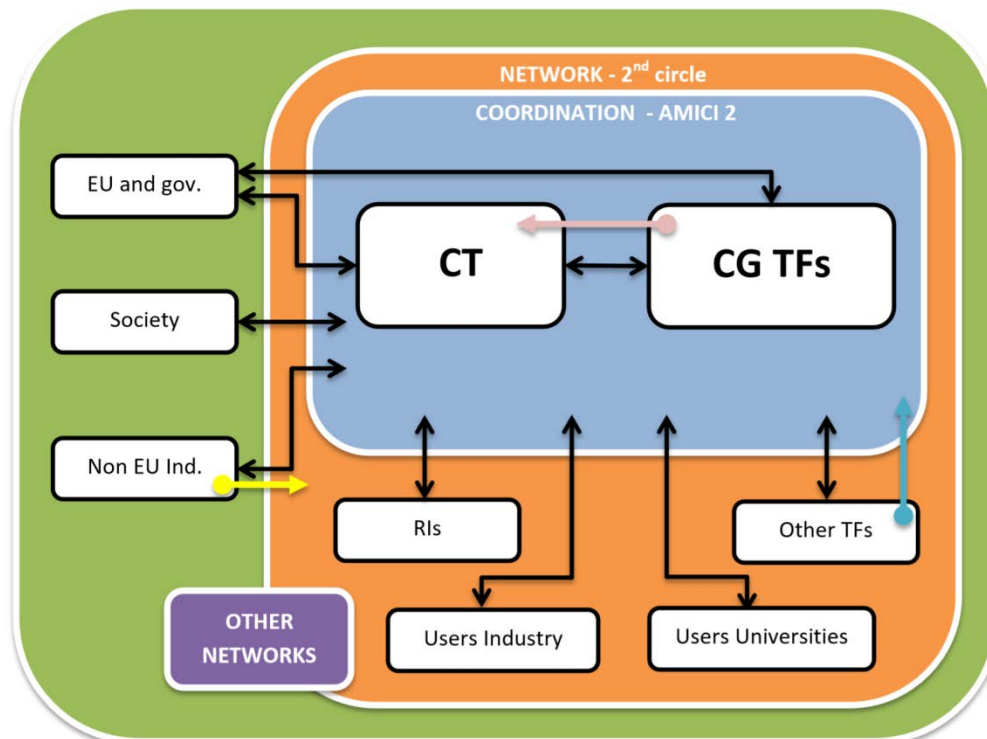


Figure 2: Graph representing the model of coordination and the channels of communication (black arrows). Blue area - coordinated EU TIs (AMICI 2), orange area - members of the network (2nd circle), purple area – other networks, green area – whole environment. Pink, yellow and blue arrows represent possible transfers.

5.1. Model of coordination

To handle those improvements coordination has to be established. Expectations are:

1. Providing better visibility
2. Providing easier access to TPs
3. Enhanced usage of TPs
4. Supporting sustainability of TPs
5. Extension of capability of TPs
6. Strengthening each partner
7. Harmonization of technology and knowledge transfer
8. Help in offering packages for industry

On the other hand, there are conflicting issues that coordination should cope with:

1. Losing decision power
2. Losing own funding
3. Losing own visibility
4. Losing TPs against own will


The proposed model of coordination is based on the combination of successful models from European countries. Shared responsibility, being aware of common needs with addition of standardization and a management team is suitable for the coordination of the European TI and will be able to handle the aspects and improvements outlined above. The proposed coordination model, called AMICI-2 in what follows, is sketched in **figure 2**.

In this report on the *Networking and coordination model* a structure for the future environment of AMICI 2 is proposed. The structure consists of a **Core Group with Coordination Team surrounded by a 2nd circle network**.

Currently, **work on more detailed structure and organization**, with in particular the definition of the role of the different partners is performed. The **results of this work will be reported as one of AMICI project final Delivery**.

6.1. Outline of further studies

There are several questions listed below to be widely discussed and studied:

- 
- A large, stylized red handwritten mark, resembling a large 'N' or a bracket, is positioned to the left of the list of questions.
- Is the proposed structure accepted?
 - Are the tasks and duties too strict/too weak?
 - Is the model understood by authorities?
 - Can non-EU industry be a part of the AMICI 2 or only the 2nd circle?
 - Is a contract needed for realization of the coordination model?
 - What type of a contract is the best for this coordination model?
 - What are the best channels of communication for each connection on the graph?
 - How to introduce AMICI 2? As a project, a group, a part of the model or an organization?

*input required for task 3.3
tbd : partnership w/ industry*

Present situation 1

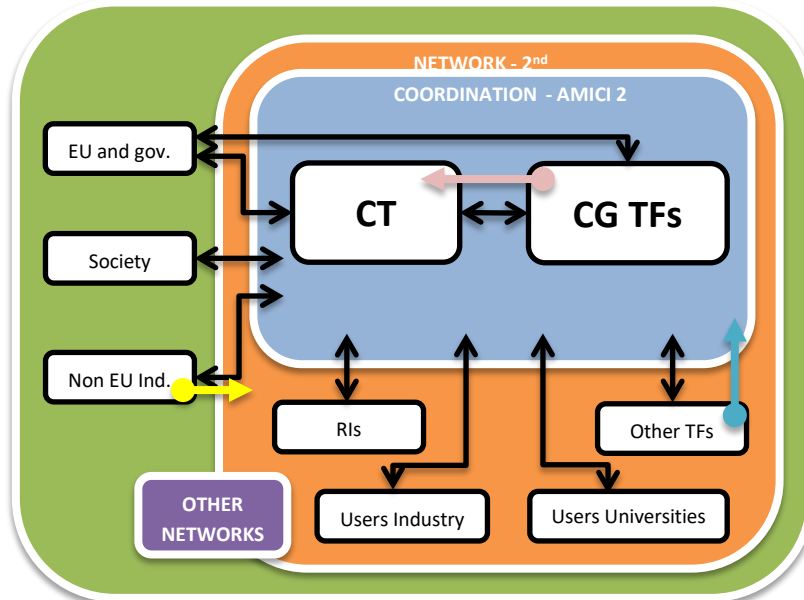


Figure 2: Graph representing the model of coordination and the channels of communication (black arrows). **Blue** area - coordinated EU TIs (AMICI 2), **orange** area - members of the network (2nd circle), **purple** area – other networks, **green** area – whole environment. **Pink**, **yellow** and **blue** arrows represent possible transfers.

To discuss on the forthcoming meeting:

1. Is the proposed structure accepted? [See 5.1 of MS12]
 - What changes should be made?
 - Focus on Industry – CT main line.
2. Are the tasks and duties too strict/too weak? [See 5.1, 5.1.1 and 5.1.2 of MS12]
3. Is the model understood by authorities?
 - How it could be made clearer?
4. Can non-EU industry be a part of the AMICI 2 or only the 2nd circle?
 - Rather only 2nd circle.

Plan

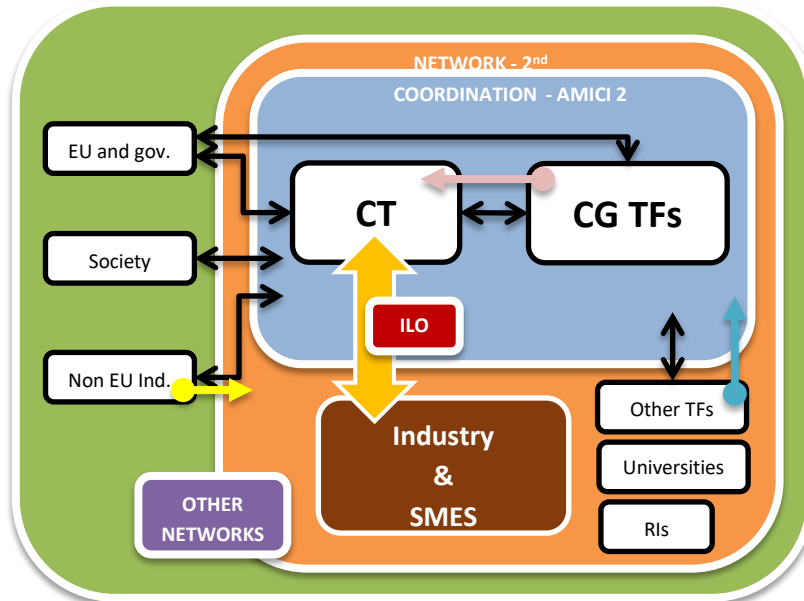


Figure 2: Graph representing the model of coordination and the channels of communication (black arrows). Blue area - coordinated EU TIs (AMICI 2), orange area - members of the network (2nd circle), purple area – other networks, green area – whole environment. Pink, yellow and blue arrows represent possible transfers.

1. Introduce and discuss more detailed description of CT and CG.
 - Put present AMICI members into the structure.
 - Assign tasks.
2. Focus on industrial participation. (WP4, WP5)
3. Apply outcomes of the discussion about the previous questions.

WP3.3: Reminder - Scope of Task 3

(IFJ PAN, CEA, DESY)

➤ Task 3 : Collaboration Agreement

- ☐ Variety of agreements / contracts exist
- ☐ Harmonize “agreements” among research labs with TIs, and industry

➤ Milestones / Deliverable in Task 3:

- ☐ **June 2018:** Collection and analysis of existing bi- or multilateral agreements between AMICI members and with other partners
- ☐ **July 2019:** Report about the proposed model of collaboration agreement

WP3.3 Work Plan and Status

➤ Survey existing collaboration agreements, MoUs, “work-together” contracts

- ☐ Start with DESY: with other research organization and with industrial partners (using DESY infrastructure, expertise etc), respectively
- ☐ Extend to other AMICI partners

➤ Analyze documents and extract common content


- ☐ Of agreements between research institutes and between research institutes and industry, respectively

➤ Milestone M3.3 after 18 month

- ☐ **Collection and analysis of existing bi- or multilateral agreements between AMICI members and with other partners**

➤ Propose a template

WP3.3 Status



COLLECTION AND ANALYSIS OF EXISTING BI- OR MULTILATERAL AGREEMENTS BETWEEN AMICI MEMBERS AND OTHER PARTNERS

Milestone: MS13

Date: 26/09/2018

Grant Agreement No: 731086

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MILESTONE REPORT

COLLECTION AND ANALYSIS OF EXISTING BI- OR MULTILATERAL AGREEMENTS BETWEEN AMICI MEMBERS AND OTHER PARTNERS

MILESTONE: MS13

Document identifier: AMICI-MS13-v1.0

Due date of deliverable: End of Month 18 (July 2018)

Report release date: 28/09/2018

Work package: WP3: Cooperation

Lead beneficiary: DESY

Document status: Final

Delivery Slip

	Name	Partner	Date
Authored by	R. Wichmann	DESY	26/09/2018
Reviewed by	H. Weise [WP3 Leader]	DESY	26/09/2018
Approved by	O. Napoly [AMICI Coordinator]	CEA	28/09/2018

Grant Agreement 731086

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➤ Conclusion

Various contract formats of several institutions were studied over the last period of the AMICI project. All analyzed agreements **cover essentially the same basis of topics with comparable content**. In case of a commercial aspect, additional sections regarding the compensation scheme have to be added, which might be / probably is very specific to the service and the service provider.

From the result of this study so far, **it seems reasonable to create a common template for collaboration / work-together agreements** which could be used **within the core group of AMICI and between core group members and associated partners**. The collaboration contract should **include a section on the governance of a (future) AMICI collaboration, which still has to be developed**.

A proposal for such a contract / template will be developed with the DESY legal department and the department of innovation and technology transfer, and will be distributed for further iterations to AMICI members within WP3.

WP3.3 (Future) AMICI Collaboration Agreement

Towards deliverable D3.3 Report about the proposed model of collaboration agreement

1.1. The present Agreement defines conditions under which the Parties agree to

- I. Offer access to existing Infrastructure to the benefit of external users including users from industry
- II. Harmonize access rules and procedures for external users in particular users from industry
- III. Provide trained personnel to operate and further develop such infrastructure
- IV. Provide training courses to the personnel from industry
- V. Exchange personnel for knowledge transfer between members
- VI. Grant access to one Party's own Infrastructure to personnel from other Parties
- VII. Develop a common plan or strategy to provide better service to future national and international projects, e.g. also by harmonizing the available Infrastructure across different Core Group members
- VIII. Create, maintain and provide access to a database of material properties and components specifications relevant for the production of accelerators and SC magnets.

via a collaboration hereinafter referred to as the "AMICI Collaboration" or "Collaboration".

Draft available on the AMICI Intranet:

<https://espace.cern.ch/amici/wp3> → Documents → WP3.3 → Draft AMICI Collab Agreement

WP3.3 (Future) AMICI Collaboration Agreement

Towards deliverable D3.3 Report about the proposed model of collaboration agreement

3.6. The goals of the Collaboration are to:

- Found a joint European Technology Infrastructure dedicated to the development, testing and production of accelerator components and superconducting (SC) magnets
- Sustain the Infrastructure considered part of the AMICI Collaboration
- Define the contents of the infrastructure of the AMICI partners and the necessary alignment for a common (across all Parties) Infrastructure
- Define the roadmap of AMICI infrastructure for strategic evolution and development
- Setup project and working groups of common interest
- Seek financing for the implementation of the roadmap
- Ensure availability of the AMICI infrastructure within the AMICI Collaboration and its access by external partners
- Ensure the availability of highly trained personnel to operate the AMICI Technological Facilities
- Ensure long term support, maintenance and development of the AMICI infrastructures
- Promote the availability of the AMICI infrastructure to external partners in particular to industrial partners
- Set-up a common compensation scheme for industrial use of AMICI infrastructure
- Set-up common rules and regulations for access to the AMICI infrastructures
- Propose training for external users, in particular industry, in the know-how, techniques and quality standards of the TFs
- Set-up, maintain and provide access to a database allowing preservation and dissemination of the common knowledge and know-how within the members and to the benefit of external users

WP3.3 (Future) AMICI Collaboration Agreement

Towards deliverable D3.3 Report about the proposed model of collaboration agreement

3.8.4. Core Member

A Core Member is an institution which hosts one of more Technical Platforms and fulfills all eligibility criteria laid out in Annex 1. A Core Member contributes to the financing of the Collaboration.

3.8.5. Associated Partner

An Associated Partner is a lab or university hosting smaller TFs not or not yet fulfilling all the eligibility criteria laid out in Annex 1 or an organization regularly using the TFs of a Core member or having a working relationship with a Core member important for the goals of the AMICI Collaboration and for the advancement of accelerator technology in Europe at large.

3.8.6. Associated Industrial Partner

An Associated Industrial Partner is a company itself hosting a technical platform in the sense of this agreement or being otherwise considered important for the European Technology Infrastructure in the scope of AMICI. The relationship between an Associated Industrial Partner and the AMICI Collaboration is detailed in Annex 4.

WP3.3 (Future) AMICI Collaboration Agreement

Towards deliverable D3.3 Report about the proposed model of collaboration agreement

3.10. Collaboration Member Rights

A Member can influence strategic decisions via its voting right in the Collaboration Board (cf. § 4.1). The voting rights of the Members are weighted according to their status, as described hereunder. Further details of the voting mechanism are described in the Terms of Reference of the Board (cf. Annex 2).

3.11.1. Core Members

The voting weight of a Core Member is 1. A voting weight of 2 is attributed to the institute coordinating the Collaboration (cf. § 3.2).

3.11.2. Associated Partners

The Associated Partners of the Collaboration elect a representative of the partners for the Collaboration Board. The voting weight of a Representative of the Associated Partners is 1.

3.11.3. Associated Industry Partners

The Associated Industry Partners of the Collaboration elect a representative of the partners for the Collaboration Board. The voting weight of the Representative of the Industry Associated Partners is 1.

Summary

see tomorrow