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Deliverable DN2.0.7,5: Fifth GÉANT2 PR Network Meeting



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Abstract

This Deliverable contains a report of the fifth meeting of the GÉANT2 PR Network, which took place in Lisbon, Portugal, 27 September 2007, to discuss the GÉANT2 segmentation project.

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0 Executive Summary

The fifth meeting of the GÉANT2 PR Network took place in Lisbon, Portugal on 27 September 2007, to discuss the objectives and challenges of the Pan-European User Segmentation Project, and to identify ways in which the NRENs can work with DANTE to progress delivery of the project.

A total of 29 attendees from 18 different NRENs, TERENA, DANTE, JISC and Prodata, the segmentation project consultants, participated in the meeting.

Due to the importance and size of the segmentation project being undertaken by the DANTE PR team, it was decided to focus the meeting solely on this topic. The key objective of the meeting therefore was to disseminate information about the project plans and objectives, and to chair their discussion and debate within the group.

DANTE's PR Manager presented the intended objectives and outputs of the segmentation project, the work achieved to date and NREN involvement. The Prodata presentation examined in more detail the database itself: its possible structures, types of information, and access tools that would be needed to build a viable GÉANT2 user database to support strategic and operational application objectives. The NREN representatives were asked to consider the project from a pan-European, not an individual NREN, standpoint and comment accordingly.

Valuable views, comments and insights were gained from the discussion; all important input to progressing the project, covering the scope, direction, objectives, limitations, database structure, output and other factors influencing the project.

Several NRENs re-affirmed their interest in being involved in the research project, some as participants on the Steering Group, whose first meeting is planned for 13 November 2007, in Paris, with the task to agree upon the project objectives, output, anticipated uses, structure and timescales.

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1 Introduction

The GÉANT2 PR meeting provided a forum to communicate the objectives and detail of the segmentation project, generate interest in the Steering Group and to discuss from the floor, the scope, limitations and factors that would influence the details of the project.

From the onset of the meeting, it was acknowledged that the subject matter of user base segmentation might be conceptually difficult to understand. The meeting and ensuing discussion was therefore to bridge this gap to ensure all meeting participants had the chance to understand what the segmentation work is about and therefore to be in a position to respond and give feedback on the project.

Dale Robertson, DANTE's PR Manager, and John Oliver of Prodata, the specialist consultancy secured to undertake the bulk of the work, made presentations on the project plans and work to date. This report itemises the main points of their presentations and of the discussion that brought up many important factors for consideration in finalising on the project details and plans.

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2 Segmentation Project Explained

Dale Robertson presented on the objectives and progress of the segmentation project, including NREN involvement to date. John Oliver of Prodata, went into more detail about the database structures, the information required to populate this, and what the outputs might be in bringing real value to DANTE and NRENs.

2.1 Objectives

GÉANT2 is a flagship project, involving substantial EU funding so there is a duty of responsibility to provide maximum benefit for users in education and research communities, by providing a pan-European network that matches their requirements. It was explained that, in addition to providing the network, GÉANT2 also develops tools and services to assist its pan-European users in getting the most out of their network usage.

Thus it follows that it is important to be able to demonstrate that the project partners understand what the users require and are responding to their needs. The right network capabilities, tools and services need to be developed to address the user requirements, now and into the future. This can be significantly aided with a segmentation database that can measure universe sizes and that contains user groups, attributes, usage characteristics and other intelligence.

The prime objective of the segmentation project was cited as to gain a clearer understanding of pan-European user requirements by being able to identify users, and then mapping their attributes and characteristics against their networking requirements. (For example, geographic location, institution type, number of users, job function and so on, and to match this against their use of the network such as services and bandwidth used.)

It was acknowledged that, whilst there may be intuitive knowledge of who the target users are, an exercise to collect and organise pan-European user details and requirements into a database, capable of interrogation for strategic and operational purposes, has not previously been attempted and is a significant undertaking.

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2.2 Progress

Two main prongs of work are in progress: desk research to quantify the GÉANT2 universe sizes (numbers of connected institutions, and numbers of connected individuals); and a project to build the database structure to house information about pan-European users and their requirements.

Some of the relevant data has already been collected by previous surveys and studies such as the EARNEST report, the TERENA Compendium and other commercially-available studies. It was noted that there are inherent problems and inconsistencies with counting institutions. For example different countries may catalogue in different ways, and within a country, each NREN, university, research campus and segmentation study may all have a different way of categorising their users and what they do. This makes it difficult to compare like with like. Consequently, although it is possible to gain an estimate of the number of institutions connected to the NRENs, it was stressed that this estimate could be varied by a factor of 10 or more depending on the counting methods used.

2.3 Applications

There are two main application areas of the segmentation database highlighted as influencing the database structure and the information to be collected: operational and strategic, but both can draw on the same segmentation information.

- **Operational**

The database is to be used as an operational tool to steer support resources and marketing communications to appropriate individuals or groups within the user population. This will enable a more formal, structured approach to PR and communications with GÉANT2's pan-European users (and potential users) by giving the ability to select, filter and focus by segment.

An example of videoconferencing was given. By identifying the requirements between segments for videoconferencing (frequency of use, typical number of participants, hardware specifications) the database can assist with prioritising in the targeting of communications and product information about this service to users and potential users in prioritised segments. Another example is that it could be used to identify those users who would benefit from technical consultancy support in order to make more use of the network.

- **Strategic**

The database can also be used as a strategic, analytical tool, for identifying and measuring targets and looking at cross-country perspectives. It is to enable measurement of current and future users, to understand different target groups using different criteria, and to identify any usage patterns.

Examples were given to illustrate the proposed use. The database should allow the analysis across all, or specific, user segments in order to assess their likely use and requirement for specific services over time. This

is all valuable input to the product planning process. Pan-European segment universe size reports, comparisons between segments, and user needs reports, would all be helpful in giving insight for communications and product development purposes.

2.4 NREN involvement

Prodata has already been in discussion with eight NRENs, to gather their input on the segmentation project. A small Steering Group of NRENs has been set up to help shape the project, to discuss more policy-level issues and the detail of the work. The Steering Group is to help direct the overall approaches to the project including objectives, output database design (such as the parameters, unit of measurement) and to advise on data gathering methodology.

The first wave of database implementation is expected to include data from up to 10 countries. To date, BELNET, CARNET, CESNET, DFN, GARR, HEAnet and RENATER have expressed their interest in joining the steering group. Other NRENs have also shown interest but do not have sufficient resource to be able to become heavily involved.

2.5 Database Structural Options

The query interface to access the database and perform drilling-down and analysis would need to be carefully designed to enable ease of use and to allow the segmentation database to meet its operational and strategic requirements.

The database would be set up to group different pieces of user requirements information that can be linked together for analysis, to look at needs across different groups, such as to drill down to find a snapshot of a particular service or bandwidth usage, or for comparisons across segments and so on. Whilst the level of granularity for the database has still to be finalised, possible fields and structure of the content were presented at the meeting. The following is a selection of fields being considered: country, institution type, department type, need type, network traffic, needs score (e.g. low, average, high etc.). The choice of fields needs to be the subject of further discussion by the Steering Group.

3 Discussion on the details, scope and limitations

Following the presentations, the meeting attendees were invited to discuss and comment on the elements of the project.

3.1 Possible applications

Delegates were asked to consider the benefit such a segmentation database might be to them. Whilst most NRENs could recognise the value to DANTE of a database of pan-European network requirements, some could not see any real perceived value in the segmentation project to their particular situations. Other NRENs suggested a number of possible applications that might help them understand and better-service their user base:

- Help with identification of low-, medium- and high-end users (and non-users) across different segments and consequent allocation of support resources.
- Help with identification of non-users who are in a segment where most other members are users and therefore could be targets for communications.
- Use of strategic segmentation to demonstrate what services will be needed by which type of user in the coming years, and thus to help justify the need to commit resources to develop certain services to help maximise network usage and new user take-up.
- Identify trends and usage patterns to prioritise which users (and potential users) should be the focus for a particular PR campaign.

3.2 Pan-European vs. country-level

Many attendees felt it was important to be clear about the objectives and not try to have the project achieve too many things else it was likely to fail, and not achieve any objectives at all. Specifically this referred to whether

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the segmentation project, which has a clear remit to be pan-European, could also realistically deliver on NREN country-specific objectives. The short answer was that it should not, despite a desire for the project to deliver as much benefit as possible for the NRENs. If a by-product of the pan-European project meant that some NRENs gained a useful tool for their use within their country then that would be a bonus. However, it was agreed that this should only be pursued if it can be done without confusing the objectives and outputs.

Several NRENs suggested that, if the segmentation project was going to be able to directly help the NRENs in their operational objectives, then the database would need to produce a mailing list of identifiable users and potential users, by name. Due to the very heavy maintenance burden involved, however, it is not intended to populate the entire database to individual user level, but selected segments may be populated with individuals in future if this was required to support, for example, a marketing campaign directed at that segment.

3.3 Database content

There was much discussion over the type of information that would go into a segmentation database, how it could be measured and where the data would come from. People found it difficult to envisage the granularity of data that would be needed to enable the segmentation project viable to meet its objectives. It was agreed that the detailed specification for the database structure is to be developed by the Steering Group.

It was put forward that the database would be more illustrative than complete. Initially to be built around departmental user units in a focus number of countries (most likely the six or so NRENs interested in taking part). There will be a certain amount of proportionate modelling and extrapolation of data to gain insight and gain trend information.

There was some concern about the potential for contravening data privacy laws in different countries. However, as it is not suggested that this be a database down to the level of individual name and contact details, it is unlikely that any such laws will be flouted. The information proposed to be held in the database will be linked to an institution and/or department and/or job role, but not a named individual. As mentioned above, it is possible specific parts of the database may be populated with individuals from time to time. If this is the case, any data protection issues arising will have to be appropriately addressed

The NRENs would still need their local databases for their own needs but should find the central segmentation database a useful complement to identify pan-European trends and usage patterns.

3.4 Data “life spans”

Several people made the point that it is vital to ensure the data collected can be managed effectively and maintained to keep it up-to-date. If this is not possible, the database is in danger of becoming value-less.

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Therefore it was noted that, in finalising the data structure and data attributes required, consideration must be given to the maintenance burden associated with the data chosen.

3.5 Data access

The pros and cons of access being held centrally or opened up to all NRENs were discussed. If access is to be kept centrally within DANTE, then this may require much manpower resource to run. It also means that only a handful of people are going to be able to access and create reports, possibly resulting in back-logs of requests. If access was to be opened up across the NRENs, people could run their own reports quickly but there may be a consequent training burden, and the system may be more open to abuse or misuse. These considerations need to be taken on board in the further development of the database concept.

3.6 Information gathering

Some valuable relevant user requirements data has already been collected by previous surveys, such as those performed for EARNEST, SERENATE and the TERENA Compendium. Prior to the Lisbon meeting contact had already been made with EUNIS (European Association of University Information Services) in relation to their involvement in the EARNEST survey, and whilst in Lisbon EUNIS expressed their willingness to be involved with the segmentation project. It was recognised that the segmentation project was of interest and relevance to the TF-LCPM (TERENA Task Force on Life Cycle and Portfolio Management). The TF-LCPM chair is aware of the project and has expressed his interest in it.

There was some discussion about whether Prodata would be collecting the data direct from the users or whether they would use organisations that have a direct relationship with them to do this - therefore not bypassing the organisations that represent the end user or who already have a dialogue with them. It is part of the plan, and agreed in discussions with interested NRENs that the NREN partners will be involved in collecting the data that will populate the database.

It was also suggested that there are people within DANTE and the NRENs who have existing ongoing relationships with users and who may be harnessed as valuable sources of information into the project. These might include people in customer relations, operations and certain JRAs. There then becomes an issue of how to channel and manage the information that can be gained here and minimize duplication of effort and data.

Much concern was raised about the unit of analysis, which might be different for each type of user or within each country. For example the unit of analysis could be organisations that represent groups of users, individuals or heads of departments. It is whoever understands the needs and uses of those users and is in a position to give detailed information about their network and service usage.

There was discussion that assumptions will need to be made in the qualification of the data since there are often differences in the way the various information sources categorise the different levels of user or measure the different aspects of network usage. For example, a size indicator is needed since some departments have 2

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users and some 200. Alternatively some applications in some departments may have higher significance than in others which again means assumptions need to be built into the database.

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4 Conclusions and Next Steps

The meeting proved to be a very useful sounding ground for the details of the project and highlighted the areas of the project that are yet to be pinned down, in particular:

- Objectives need to be clarified so that the pan-European nature of the project is not confused with the specific needs of individual NRENs. That said, whilst recognising that different countries have different levels of information needs, sharing some insight into different countries' users' behaviour could bring benefits on a pan-European basis.
- The database structure needs to be established, with guidelines as to the data to be gathered, its parameters, measurements and assumptions to ensure the data can be compared as much "like with like" as is possible. Care must be taken to ensure that the inputs are capable of delivering the expected outputs and that the data has a long "shelf life".
- Existing sources of data and potentially useful relationships to be explored. This will ensure the inclusion of all known sources of data, and will seek to leverage the close relationships of people and organisations that represent users and/or enjoy end user relationships, to become channels for collection of new data.

The first meeting of the Steering Group is planned for 13 November, in Paris, with the initial remit being to agree the project objectives, scope, structure and timescales.

Appendix A Meeting Agenda

Agenda for the Fifth GÉANT2 PR Network Meeting: Thursday 27th September 2007, Lisbon, Portugal.

- 09.30 Welcome and Introductions (Dale Robertson)
- 09.35 Segmentation Project introduction, objectives and current status
- 09.50 Segmentation database (Prodata): Database description, NREN involvement and input, Project structure and timescale
- 10.30 Coffee break
- 10.45 Discussion, including views and input on database:
- (1) Scope: existing users vs. new users; pan-European only vs. national
 - level of detail (unit of analysis)
 - nature of information
 - (2) Existing information and initiatives NRENs consider relevant
 - (3) NREN involvement and input
 - (4) Views on scope and focus of research to feed into the project i.e. pan-European user research
 - (5) Next steps: project timeframes and steering group meeting
- 12.30 Close and lunch

Appendix B Meeting Attendance

Fifth GÉANT2 PR Network Meeting attendance: Thursday 27th September 2007, Lisbon, Portugal.

Name	Organisation	Name	Organisation
Christine Dworak	ACONet	Sarah Ball	Prodata
Tomi Dolenc	ARNES	John Oliver	Prodata
Veerle Custers	BELNET	Virginie Blanquart	RENATER
Goran Skvarc	CARNet	Anne Balic	RESTENA
Gabriela Krcmrova	CESNET	Marielle Heesters	SURFnet
Tiina Leiponen	CSC	Elise Roders	SURFnet
Melanie Pankhurst	DANTE	Lonneke Walk	SURFnet
Dale Robertson	DANTE	Roland Eugster	SWITCH
Maria Ristkok	EEnet	Laura Durnford	TERENA
Marta Dias	FCCN	Carol de Groot	TERENA
Rose Turner	HEAnet	Lennart Forsberg	UMDAC
Russell Nelson	JANET	Gitte Kudsk	Uni-C
Robert Haymon-Collins	JISC	Vanessa Camilleri	University of Malta
Lajos Balint	NIIF/Hungarnet	Paavo Ahonen	CSC/FUNET
Rami Heinisuo	NORDUnet		
Apologies			
Kim Cunningham	DANTE	Matt Jukes	JISC

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