**Policy Regarding Use of OSG by a Commercial Entity**

**Purpose of Document**

This document describes the policies and guidelines that govern access to and use of the OSG by a Commercial Entity or an individual employed by a Commercial Entity. There are two distinct cases that must be addressed:

1. use of OSG by an individual employed by a commercial entity
2. a commercial entity that wants to form a VO within OSG; this includes a user community and/or connecting resources to the OSG

The Open Science Grid (OSG) enables collaborative science by providing a national cyber-infrastructure of distributed computing and storage resources. OSG is jointly funded by the Department of Energy and the National Science Foundation to build, operate, maintain, and evolve a facility that will meet the current and future needs of large scale scientific computing. OSG does not own any compute or storage resources and provides access to these resources which are owned and operated by universities and national labs in the United States. The OSG has a responsibility to enable appropriate use of these resources by scientists and researchers who are typically associated with a university or national laboratory in the United States; and thus use of the OSG by “for profit” companies or individuals who work for such companies is generally not allowed.

However there are certain situations where it may be appropriate to allow access to and use of the OSG by “for profit” companies or individuals who work for such companies; this document provides a framework for those situations.

**Use of OSG by an Individual Employed by a Commercial Entity**

From time to time, virtual organizations might engage with individuals who are employed by a “for profit” company and would like to access OSG resources to pursue specific projects. Projects can be classified as a) **supportive** (all results are retained by an academic member of the VO), b) **commercial** (results are retained by the commercial entity) or c) **collaborative** academic/commercial engagements. In addition the projects can be further classified as **pilots** (demonstrating feasibility of a particular approach, typically no more than a few cycles of a particular workflow consuming <1% of annual VO allocation) or **production computations**.

In general **commercial** projects in either a pilot or in a production phase are not supported by OSG.

**Supportive** projects in both phases are allowed, providing that 100% of the outcome is retained with the non-profit VO member.

**Collaborative** engagements are supported only in the pilot phase and have to provide a documented and substantial benefit to a non-profit member. Following rules apply:

1. All collaborative academic/commercial runs have to be approved by the VO director.

2. All collaborative academic/commercial runs have to be documented by the VO (number of hours, purpose of computations, personnel involved).

3. VOs shall submit a report on all collaborative/academic runs to OSG management on an annual basis (covering successes, failures, issues, utilization, etc).

4. Usage in access of 1% of annual allocation is not allowed without written approval from the OSG Council. In general usage exceeded more than 5% will be rarely approved (we could also cap this in terms of CPU hours).

Additional rules governing supportive and collaborative access:

An individual employed by a “for profit” company may use the OSG by joining the OSG-VO if that individual is sponsored by a member of the VO and provides a written endorsement from the sponsoring VO member stating that:

1. the individual is doing supportive or collaborative work for the VO member that is documented in a written agreement between them.
2. the use of the OSG-VO by the individual is in direct support of the purpose of the grant/contract from the sponsoring OSG consortium member to the individual,
3. ~~an intellectual property agreement exists between the OSG consortium member’s organization and the individual’s company,~~
4. the individual shall abide by the Open Science Grid User Acceptable Use Policy, and
5. ~~the sponsoring OSG consortium member shall provide quarterly status reports to the OSG management covering successes, failures, issues, utilization, etc.~~

We expect that most requests made under this policy will be due to an SBIR grant or a contractor/consultant doing work for an OSG consortium member.

**A Commercial Entity that wants to form a VO within OSG**

Do we really need this provision? I think all commercial engagement with OSG should be coordinated through an existing VO.

Occasionally, the OSG receives a request from a Commercial Entity to form a VO within OSG; this includes a user community that can access resources within OSG and attaching new resources to OSG.

A commercial “for profit” company may join the OSG by forming a VO if that entity is sponsored by a member of the OSG consortium and provides a written endorsement from the sponsoring OSG consortium member stating that:

1. the company is doing work for the OSG consortium member that is documented in a written agreement between them,
2. access to the OSG by that company is in direct support of the purpose of the grant/contract from the sponsoring OSG consortium member to that company,
3. an intellectual property agreement exists between the OSG consortium member’s organization and the company,
4. the company and newly formed VO shall abide by all applicable policies of the Open Science Grid, and
5. the sponsoring OSG consortium member shall provide quarterly status reports to the OSG management covering successes, failures, issues, utilization, etc.

In addition, the sponsoring OSG Consortium member will provide quarterly forecasts and negotiate agreements with the OSG management for all usage of OSG resources that are not owned by the new VO. And the sponsoring OSG Consortium member will effectively monitor the usage against the negotiated plans and take needed corrective actions and immediately notify OSG management if there is the possibility of exceeding the negotiated plan.

**Exceptions and Appeal**

If an individual applicant or commercial entity does not meet all the above criteria, an appeal may be made to the OSG Executive Director who can make decisions regarding this policy based on the specifics of the situation and intended usage plan.