TECHNICAL ANNEX

# S&T EXCELLENCE

## Soundness of the Challenge

### DESCRIPTION OF THE STATE OF THE ART

Charged particle accelerators are widely spread in Europe and in the world. The largest facilities are synchrotron radiation light sources (storage rings or free electron lasers), high energy physics colliders, nuclear physics research facilities and synchrotrons for hadron therapy.

Particle accelerators are widely spread in Europe and around the rest of the world. The largest facilities are synchrotron radiation light sources (both storage rings and free electron lasers), high energy physics colliders and nuclear physics research facilities. These accelerators are used both for fundamental and applied science and are crucial instruments for scientists to be able to understand the world around us and find technical solutions to the challenges of the future. It is therefore essential that reliable operation is ensured as well as smooth commissioning of the new and upgraded facilities that are planned to come online in the coming years.

The process of commissioning an accelerator and finally deliver the performance required by the users consists in determining the correct configuration of the magnets, RF structures and diagnostics that will allow to achieve the design parameters for the particle beam and to operate the machine over long periods of time with high reliability and availability while maintaining these parameters constant. The most important quantities to correct are generally the beam closed orbit or trajectory that represents its average position throughout the accelerator and the accelerator linear and non-linear optics that will, for example, impact the beam size, Touschek lifetime [1] and the ability to re-inject particles into the accelerator [2]. Other aspect such as beam stability are critical for operation and require active correction algorithm implemented in feedback loops. Advanced experimental methods and algorithms have been and still are developed to optimize this process and to operation accelerators in the most efficient way.

While these methods and algorithms can be applied and are used with some small variations by all the particle accelerators in the world the software applications to implement them are generally facility specific. The physicist and computer engineer who develop them have to adapt to the different control systems and hardware configurations. In addition, the same tools need to be developed again for simulations at the design phase of accelerators, in order to specify alignment and magnetic field tolerances together with hardware and diagnostics specifications. This constant re-implementation and adaptation of existing numerical tools represents a large use of highly specialized resources to simply repeat what has already been done before, elsewhere, multiple times. It is therefore desirable to instead developed these tools in a collaboration between many facilities.

In 1993, a world-wide collaboration effort around commissioning and operation tools for synchrotron light sources was started by the development of the software called Matlab Middle Layer (MML) [3], originally initiated at SLAC National Accelerator Laboratory/Lawrence Berkeley National Laboratory (LBNL). MML gave smaller facilities easy access to the same tools and algorithms as used by the large laboratories. One example is Linear Optics from Closed Orbit (LOCO) [4] which is used for linear optics corrections. The MML software provided since the beginning: 1) independence from the underlying control system 2) abstracted element naming conventions 3) graphical interfaces for common tuning and design tools 4) the possibility to run the measurements and control loops in “simulation mode”, thus allowing to test software tools without the need for precious beam time, or in absence of the accelerator for new projects. The simulations were done using the software Accelerator Toolbox (AT) [5], which is a set of Matlab [6] functions dedicated to simulations of beam dynamics for high energy particle accelerators.

Presently, the Matlab Middle Layer (MML) software is used by most synchrotron light source laboratories to link the beam dynamics simulations with commissioning and operation activities. In many aspects, it acts as a **digital twin**. All required high-level software applications (from magnet calibrations to optics tuning) can be developed based on beam dynamics simulations in the Accelerator Toolbox (AT). The same code (including user interfaces) is used directly with the real beam by simply switching global flags ("physics"/"hardware" for units and “simulator/online” for control). This tool has tremendous advantages for the development of new storage rings and for their commissioning and operation. Moreover, the tools developed in one laboratory within MML are immediately usable by all other laboratories using MML, thus fostering exchanges and collaboration between accelerator physicists around the world.

However, the Matlab Middle Layer, developed in the 90's, has branched into many versions and has become impossible to maintain in a collaborative way. The last non-laboratory specific version update dates from 2017. Since the code does not implement modern coding practices, libraries and scientific open data management it will soon become obsolete and put our facilities at risk. In this context, updating MML would require an entire re-writing of its core and user interfaces in Matlab, a proprietary software not well know among students and young professionals entering the field of particle accelerator. This may not be the best suited option to tackle such heavy development effort. It nevertheless remains a most valuable tool that can serve as a reference for the present project proposal and can temporarily be used in its present frozen state to maintain operation until a better alternative is available.

Python [7], on the other hand, is open-source, is among the most widely used programming languages and benefits from extensive open-source scientific libraries integrating modern algorithms. Choosing Python to replace MML allows reaching a much wider audience, simplifies interfaces to many other codes used by our community, and will help in the future developments critical for the new, more complex, generation of accelerators.

Available python packages allow integrating modern computing techniques such as heavy parallelization (CPU/GPU) or to interface for modern scientific libraries involving advanced data analysis, optimization algorithms or machine learning algorithms that are now a critical aspect of accelerator design and operation.

The development of a new, modern, and open-source “Python Accelerator Middle Layer” will draw from the expertise gained by the accelerator community (including the network of proposers) in the python Accelerator Toolbox (pyAT) software toolkit for high energy charged particle beam dynamics. It will also build upon the implementation of python interfaces to control systems developed by the network of proposers and at several world-wide laboratories as independent local projects such as *aphla* (at NSLS-II, Brookaven National Laboratory) [8], *sirius-py* (at the SIRIUS Light source in Brazil) [9] and the *python virtual accelerator* developed at PSI (Switzerland) [10] pytac (Diamond Light Source, UK). Those will provide the seed to build an accelerator-oriented software library reproducing the features of MML in Python, but also extending them further to include new requirements and paradigms while keeping the independence from the specific accelerator control system (for example the commonly used TANGO [11] or EPICS [12]), thus fostering collaboration.

Most building blocks for a new Python version of MML have started independently in several laboratories. For example, joint efforts in the network of proposers of this Action have also progressed recently towards the translation of error setting and correction functions from Simulated Commissioning (SC,based on Matlab AT) [13] to Python, extending the tuning possibilities presently available in MML and in particular reproducing the features of LOCO optics correction in Python language. This project would nevertheless strongly benefit and gain in efficiency from structured coordination and better networking.

### DESCRIPTION OF THE CHALLENGE (MAIN AIM)

The newly designed **Python Accelerator Middle Layer (pyAML)**  will be a common work among all participating institutes and companies, to put together the existing tools and create the missing components (such as graphical interfaces, CPU or GPU parallelization and Machine Learning support) to form a common library that can be used by all. The pyAML project will profit from recent developments in addition to the following required features already available in the MML software:

1. Control system agnostic (abstract interaction to different control system)
2. Accelerator/facility agnostic (abstracted name convention for all devices)
3. Works for transfer-lines, linear and circular accelerators, ramped accelerators
4. Digital twin: allows testing of tuning tools in real life conditions without the need of expensive and rare beam time
5. Tools for orbit, trajectory, linear and non-linear optics corrections

It would also feature, thanks to existing Python packages:

1. Fully open source code (with an open software license to be defined, such as Apache 2.0)
2. Include the possibility to be used on large computing clusters for automated commissioning simulations,
3. Profit from recent beam dynamics developments to be faster and more precise than the existing MML (e.g. GPUs and analytic Jacobians) by using state-of-the-art programming techniques and state-of-the-art accelerator-oriented library,
4. Enable easy and user-friendly connection to any control system (for example EPICS and TANGO the most diffused), starting from the simple set/get abstractions to include more advanced features such as control system commands, properties and timing features
5. Make use of most modern OPENDATA, OPENSCIENCE and FAIR (Findable, Accessible, Interoperable, Reusable) principles [14] and data labeled for Machine learning and Artificial intelligence algorithms [15]
6. Include off-line digital twin for tuning tools development and on-line digital shadow for monitoring of indirect observables and anomaly detection.
7. Enable straightforward implementation of available python based Artificial Intelligence and Machine Learning tools (e.g.: pytorch [16], Badger/Xopt [17])
8. Enforce thorough documentation and easier/shared maintenance (Github)
9. Provide a virtual accelerator environment to train students or newcomers

pyAML represents also a virtual machine that could be set up to simulate the accelerator in real-time. Its use could then be extended (compared to MML) to continuously monitor characteristic quantities (orbit, tunes, optics, etc..) and their drift concerning the expected values and feed Artificial Intelligence (AI) models that can be used to support operation or efficiently detect or predict failures (anomaly detection). The operation of accelerators will strongly benefit from such modern numerical tools.

## Progress beyond the state of the art

### APPROACH TO THE CHALLENGE AND PROGRESS BEYOND THE STATE OF THE ART

pyAML will bring together a pan European network of laboratories and companies to exchange and build a common tool upon which to share developments and to provide an excellent opportunity and framework to train the young accelerator physicists.

The Action members will define a **new architecture** for the code, taking inspiration from existing tools and operational experience. The new architecture will be designed such to be **easy to expand, easy to maintain and easy to setup**. Each component will have detailed specifications, documentation and dependencies. Unit tests will be designed to guarantee code durability and performed in a Continuous Integration/continuous Deployment (CI/CD) platform.

The proposed structure of the pyAML software packages is depicted in figure 1. The green dashed boxes highlight the novelties introduced by this project. Those are either based on existing separate projects or totally new features enabled by the new code architecture.

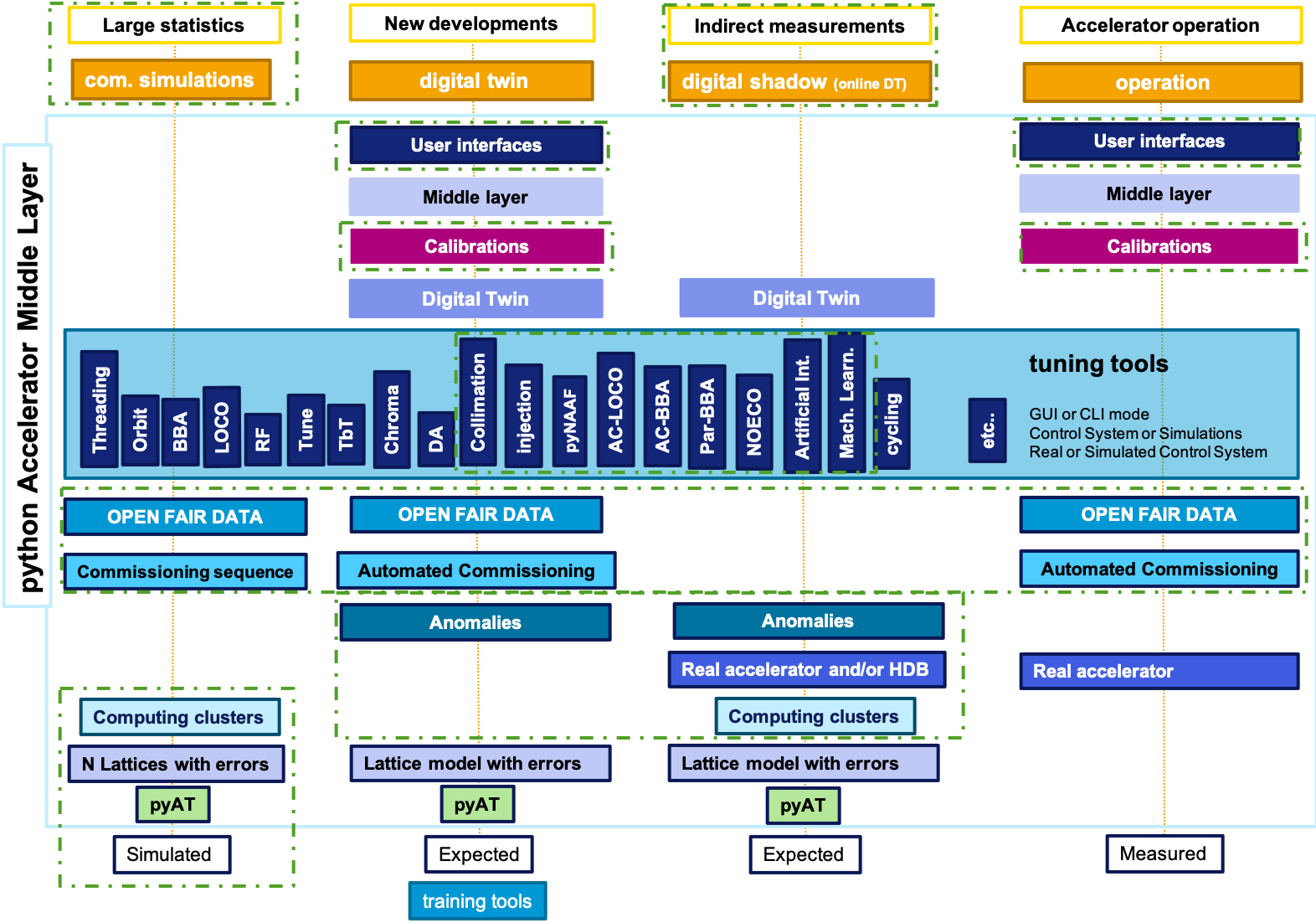


Figure 1: pyAML proposed software packages structure. Green boxes represent the progress beyond the state-of-the-art proposed by the pyAML project.

This pyAML architecture will meet the requirements off all presently existing use cases and will also allow to expand towards **automation**, **anomaly detection** and artificial intelligence and machine learning **non-linear magnets optimizations**.

The graphical interfaces will be completely separated from the computational aspects, such to allow a **fluid and customizable user interface design**.

The data structures used within pyAML will implement open **FAIR data** principles and will internally profit from them, making extensive use of metadata in a clear human readable format. This is necessary to enable quick problem-solving during accelerator commissioning and trouble shooting.

The **digital twin** mode of pyAML, will be invaluable for off-line development but also for training of the next generation of accelerator operators, scientists and engineers. They will be able to learn beam dynamics, use real charged particle accelerator control tools and experience in practice actions that will be the daily activity of their career without the need for access to a real accelerator.

The digital twin will be either updated based on a simulated lattice or on realistic data. This realistic data could be simply the accelerator settings themselves or archived data. The continuous update of the pyAML digital twin with data coming from the real accelerator settings will enable a **Digital Shadow** which will show the expected machine behavior in terms of beam dynamics as settings are changed. This will in turn give access to the possibility to compare at an high rate the expected and measured performances, thus paving the way to **anomaly detection** systems potentially improving the operation efficiency.

The two distinct branches of research on **commissioning simulations** and real accelerator tuning will be unified, making the pyAML based software able to run the same algorithm (ex: orbit correction): 1) on the accelerator itself, 2) on the digital twin simulation or 3) on a **large number of virtual machine realizations** with random errors defined by the users and distributed on a computing cluster for their evaluation. The first two options where already available in MML, the third is currently available in separated software package (pySC), and it will be integrated in the same infrastructure thanks to pyAML, once again avoiding repetition of the same tools and bridging the gap between simulations and measurements.

### Objectives

#### Research Coordination Objectives

**Build a pan-European research network** with diverse stakeholders including researchers, software engineers, students, PhDs, PostDocs, engineers, operators, and private companies across disciplines and countries. The objective is to support increased collaboration and coordinated action in the development of pyAML, for both short and long-term developments.

**Combine efforts in the development of existing and new accelerator control and modelling tools.** The existing and new algorithms procedures and software tools developed based on pyAML will be readily available to any other stakeholder independently from the diverse control systems, geographical locations and kind of accelerator. This will build on the existing work of Action members and world-wide published results.

**Support the development of the pyAML joint technology platform.** This objective is necessary to: 1) maximise the impact of modern tuning algorithms; 2) enable the re-use, comparison and analysis of large data sets; and 3) enable world-wide access to state-of-the-art accelerator tuning tools.

**Develop a coordinated research agenda** for accelerator tuning tools development that addresses key challenges such as anomaly detection and non-linear magnetic elements (optics) optimizations. The Action will list the most demanded tools and plan for their integration in the pyAML platform, eventually expanding beyond the end of this Action.

**Support Young Researchers and Innovators (YRIs), and researchers from Inclusiveness Target Countries (ITCs)** by ensuring their involvement and active participation throughout the project and full representation in all activities, including Action leadership. The objective is to develop a new generation of accelerator experts, who will have a solid network of collaborators, and the expertise needed to drive future research in particle accelerators commissioning, tuning, optimization and operation.

#### Capacity-building Objectives

Building capacity in all Action countries is a central goal of this COST Action. While focused on young researchers, this includes more senior researchers new to this research field and laboratories/industry that do not yet have a charged particle accelerator. Particle accelerator operators will also be strongly involved. The Action focuses on providing access to state-of-the-art knowledge on accelerator control operation and tuning across Action members. Specific capacity-building objectives of the pyAML Action include:

* **Fostering communication** and **collaboration among Action members from diverse backgrounds**, in particular experts of high energy charged particles beam dynamics working at different accelerators, with computer scientists, operators and private companies.
* Facilitating the **transfer and exchange of knowledge** between: 1) research areas like accelerator commissioning simulations, accelerator operation and accelerators controls system design and 2) laboratories and private companies.
* **Building partnerships for research collaborations,** particularly among young researchers and participants from Inclusiveness Target Countries.
* Enable **collaborative workshops** including **contributions from various research fields**, including computer sciences, beam dynamics, control systems, data acquisition, AI/ML and functional mockups. **Enabling conference participation** by participants targeted by the COST Excellence and Inclusiveness policy.
* **Short-Term Scientific Missions** to test the software tools developed in real accelerator scenarios and to expand the skills and widen the knowledge level of participants.
* **Build on existing accelerator middle layer initiatives**, at national and international laboratories, drawing on their experience and expanding our ability to effectively commission, correct, optimize and operate particle accelerators.
* **Build a large and inclusive network of researchers spanning COST countries**, dedicated to the field of particle accelerators commissioning, tuning and operation and actively engage with other laboratories and institutes making use of accelerators and private companies. The network will actively grow and address gaps over the course of four years through online and in-person networking activities, including Working Group meetings and Training Schools. The network will stimulate science-practice exchange, fostering co- development of knowledge, skills, and action through activities such as short-term visits for researchers at stakeholder organizations. It will take concrete action to promote diversity, equality, and inclusion and ensuring active involvement of YRI.
* **Empower collaborations** in European research projects in the following ways: 1) encourage network members to write collaboratively funding applications, 2) continue the link established among researchers after the duration of the Action by developing a roadmap for collaborative research, 3) organize online events, provide newsletters and promote research through social media, 4) maintain the Action website as an ongoing, open access resource for researchers, operators and private companies.
* **Support to YRIs** by giving them prominent roles in the development and management of the Action. Short-Term Scientific Missions will be hosted by home institutions of Action members and by excellence centers world-wide. Early stage researcher and practitioners will derive considerable benefit from the broader activities offered by a COST network, such as participation in WG activities, Training Schools and conferences, and from the opportunity to develop collaborative partnerships. The network will organize at least three Training Schools. YRIs and early career participants will be given the opportunity to lead these activities and decide the most relevant subjects.

All these capacity-building objectives will be pursued considering the COST inspiring principles of inclusivity and excellence. Young Researchers and Innovators will be strongly encouraged to actively take part in the implementation of the Action activities. The involvement of ITC partners in the knowledge sharing and community proposal will be one of the Action priorities.

pyAML aims at merging the research efforts of laboratories, which have so far operated separately. Barriers in terms of scientific language and culture among the communities must be overcome for pyAML to be successful. The Action will thus organize regularly informal Zoom meetings for members of pyAML, thematically separated in terms of the Working Groups.

# NETWORKING EXCELLENCE

## Added value of networking in S&T Excellence

### ADDED VALUE In relation to existing efforts at European and/or international level

pyAML is the second large-scale effort in the accelerator community directed towards the creation of a software middle layer to share modeling and operational correction tools developments among laboratories. The first such effort (Matlab Middle Layer) was initially very successful but slowly lost momentum to become finally frozen (or lab-specific) since several years now (last update in 2017). The software developed within pyAML will be able to replace and extend the features proposed by MML. It will also restart the collaborative development in the particle accelerators community in a more shared and organized manner, thus making it more likely to last in time. Some individual laboratories already started transferring their MML based accelerator tuning tools to their own operational ecosystem, but without the intention of making a tool usable and expandable to all other laboratories. This is a too large effort effort for a single lab/company, but becomes possible in the framework of a COST Action. The vision of the pyAML Action calls for a truly interdisciplinary approach and coordination of these efforts, to achieve breakthroughs in various fields (data, computing clusters, non-linear magnets optimizations, calibration cross-talks, etc…). It is thus crucial that these efforts are linked together, not only to advance the field of particle accelerator tuning and operation, but also to identify knowledge gaps and harmonize the portability of scientific knowledge among contributors within pyAML. As such, a COST Action is uniquely placed to provide support for networks on such a scale. In particular, it will provide mobility of researchers, access to large facilities, intensive information exchange, and a whole educational program for young researchers, that would be impossible under any other type of research network. Moreover, the open nature of the Action will assure timely income of new partners and ideas, which will be also actively sought by the pyAML consortium.

## ADDED VALUE OF NETWORKING IN IMPACT

### SECURING THE CRITICAL MASS, EXPERTISE AND GEOGRAPHICAL BALANCE WITHIN THE COST MEMBERS AND BEYOND

pyAML will build on particle accelerator laboratories across member countries. The network of proposers consists of a large number of top researchers, software engineers and private company experts, balanced by discipline, geography, gender and age. It will also connect with international laboratories including SLAC (USA), LBNL (USA), BNL (USA), LNLS (Brazil), IHEP (CHINA), ANSTO (Australia) and PAL (South Korea) all devoted to particle accelerator physics. Initiators of this Action have already reached out to these organizations and other stakeholders and will actively broaden this network throughout the Action. Further participation will be ensured through outreach in all major pyAML events. The network will include academics, software engineers and representatives from industry. Together they represent ***a critical mass of stakeholders*** that is truly ***inter-disciplinary*** (e.g., physics, software, computer science, control systems, web interfaces for applications), ***inter-cultural*** and ***inter-connected*** (e.g., representing a wide range of European countries and cultures)**.** The network will be ***inter-sectoral*** and will bridge the gap between research and practice.

The international reach of the network will be ensured through participation at international conferences targeting both researchers and engineers. Alongside knowledge sharing, these activities will help to grow the network by engaging new partners and providing greater opportunity for future collaborations.

pyAML will also be ***inclusive*** and ***inter-generational.*** The project includes a Working Group (WG1) dedicated to supporting interdisciplinarity and inclusion. pyAML will involve members at all career stages including early-career participants, Young Researchers and Innovators and senior researchers. The network will ensure a critical mass and active participation through social networking and dissemination activities at local, regional, and national level.

The need to test the software developed by pyAML will encourage the Action members to spend time in different laboratories, industries and facilities, creating new links and eventually expanding the participation in pyAML.

The criteria of pyAML to be control system and machine independent will contribute increasing the critical mass and expertise of the Action.

### INVOLVEMENT OF STAKEHOLDERS

*Charged particle accelerator based laboratories and related industries* are the primary stakeholders of this Action. Further involvement of stakeholders benefiting from an efficient and comprehensive set of tools for commissioning and operation of their accelerators will be sought when the COST Action is granted. As this Action aims to draw knowledge from stakeholders in well-established accelerator tuning techniques and well-known charged particle accelerators beam dynamics, further integration of valuable chain partners is likely.

All Action members will participate in: 1) consolidation of mutual synergies and collaborations and the beginning of new ones, 2) knowledge exchange with local and international scientists, 3) increased awareness on opened science questions through sharing the Action’s contents and objectives.

Young Researchers and Innovators shall primarily be involved and shall benefit from the activities by networking, internationalization, and communications, such as meetings, conferences and workshops aimed towards: 1) the development of their comprehensive professional profile and skills, 2) promoting the participation of women in research and reducing their under-representation at higher levels on the career ladder, and 3) encouraging the integration of multiculturalism and diversity in research.

The presence of proposers at key sector events, including IPAC2025 (Taiwan), IBIC2025(Liverpool, UK), ICALEPCS2025 (Chicago, USA) and future similar events, will facilitate further stakeholder involvement. Moreover, targeting these established events will foster a dialogue between current COST Action participants and newcomers in the field.

*Ultimately, pyAML will act as a unique focal point for a diverse network of stakeholders, supporting coordinated action and allowing us to develop a roadmap for research on tuning tools for commissioning, operation and enhancement of charged particle accelerators.*

# IMPACT

## IMPACT TO SCIENCE, SOCIETY AND COMPETITIVENESS, AND POTENTIAL FOR INNOVATION/BREAKTHROUGHS

### SCIENTIFIC, TECHNOLOGICAL, AND/OR SOCIOECONOMIC IMPACTS (INCLUDING POTENTIAL INNOVATIONS AND/OR BREAKTHROUGHS)

pyAML will make design, commissioning and operation of existing and future charged particle accelerators, faster and collaborative. The proposers of this Action (and those partners that will likely join after the Action is approved), will share experiences and tools. By joining resources, increased time will become available for new developments and tests of new ideas. Also new facilities deciding to use the software developed by pyAML will not have to reinvent the wheel again, but will profit from tested, reliable and continuously maintained tools for their development representing an enormous gain in time and resources for future projects. Table 2 lists the foreseen short and long term impacts of the pyAML network actions.

|  |  |
| --- | --- |
| Scientific impact | |
| Short term impact | **Long term impact** |
| An inter-disciplinary network of scientists collaborating on advancing accelerator tuning tools through a common middle layer software | A sustainable network that supports long-term, high-impact accelerator tuning tools development research and maintenance |
| A roadmap for the development of accelerator tuning tools that leverages scientific and technical advances | Collaborative research projects and coordinated actions that address a key challenges for accelerator design, commissioning and operation |
| A new architecture for accelerator tuning software, easy to expand, update, maintain and setup. | More efficient commissioning of new accelerator and improvement of the performance of existing machines. |
| Mentorship and increased opportunity for YRIs and young researchers working in particle accelerator physics | A new generation of scientist, researchers and innovators who will drive the future of charged particle accelerators design, commissioning and operation |
| Technical impact | |
| **Short term impact** | **Long term impact** |
| Shared case studies of middle layer software implementation | A common platform for the development and operation of advanced tuning tools for particle accelerators independent of the specific control system and of the layout and naming conventions of a specific accelerator allowing easy sharing and integration of new tools. |
| Guidelines for the implementation of AI and machine learning for particle accelerators | AI technologies that are able to improve accelerators performance criteria such as: beam lifetime, injection efficiency, beam transmission, beam size, etc.. |
| Software services for accelerators tuning usable from command line for common tasks such as tune, orbit, beam based alignment, chromaticity and optics correction which are applicable to any accelerator (linear/circular, ramped/fixed energy, etc…) | Software services for as many as possible accelerators tuning procedures and algorithms usable from command line or as parts of a sequence of tuning actions in large statistics simulations run on computing clusters |
| User friendly and documented accelerator tuning tools | Thin graphical interfaces, with no need for computations (done in separate processes) |
| Case studies of successful implementation of middle layer technologies for particle accelerator tuning | Consistent sharing, re-use and adoption of tools developed for particle accelerator tuning, with minimal or absent adaptations |
| Socio-economic impact | |
| **Short term impact** | **Long term impact** |
| Greater interaction between researchers, software engineers and companies in the field of particle accelerator tuning. | Reciprocal communication that increases the capacity for research to be fast and effective in bringing particle accelerators performance to unprecedented levels and expand the amount of laboratory/companies which can operate accelerators. |
| Increased emphasis on diversity, inclusion and equality in particle accelerator research at the European level. | Less differentiation of software for the same tasks, with the provision of online documentation which meets the needs of diverse groups in an inclusive and equitable manner |
| Faster commissioning and accelerators tuning. Faster application of development done in other sites to improve beam quality | Better beam for users, thus more/better/faster experiments with the existing infrastructures |
| Greater collaboration and knowledge exchange between participants in different countries | More time/resources available for new developments thanks to the pyAML tools that reduce drastically the time and resources needed for re-implementation of the software needed for accelerators tuning. |

Table 2: Short and long-term Impacts of the pyAML network

## MEASURES TO MAXIMISE IMPACT

### KNOWLEDGE CREATION, TRANSFER OF KNOWLEDGE AND CAREER DEVELOPMENT

pyAML will achieve its scientific objectives through 4 interdisciplinary WGs (described in section 4) that will coordinate and meet regularly to work on specific themes that will fuel the global networking Action activities. This will be done by exploiting the available networking tools of COST in order to bring together target groups of experts and Early Career Investigators (ECI) from the different communities relevant for this Action.

One of the key pillars of the Action will be tests of the software releases at several laboratories, which will mainly take place via **Short Term Scientific Missions**. These are an effective way to ensure knowledge transfer with direct human contact and training through common research. For this pyAML will launch STSMs among the members of the different WGs, giving priority to establish new collaborations between ECIs and experts in the field as well as between experienced researchers and ITCs or underrepresented groups. Besides boosting the research output of the Action participants, these tools will help to increase the global capabilities of the community and strengthen efforts to achieve the Action objectives.

Another pivotal element that pyAML will use to transfer and communicate knowledge through the network will consist of different types of meetings, namely:

**International Conference**: an annual international conference will be organized. This event will aim to bring experts in the different topics of interest for the Action and help the rest of the community, especially ECIs and ITC researchers, to interact with them and other experts. These events should act as a catalyst for new collaborations that could be implemented via STSMs. In addition, these conferences will also be useful to highlight relevant results from STSMs and the work of underrepresented groups, ITC researchers, and ECIs.

**Workshops:** pyAML will also feature regular short (half day) workshops for more focused research areas and WG interfaces which will accelerate many of the Action's objectives.

Finally, pyAML will train and promote ECIs by complementing their career development with several Action activities, which will be:

**Training schools:** pyAML aims to organize one training school per year that will equip the next generation of researchers with new skills for the development of pyAML software tools and to broaden their accelerator physics knowledge. These will be interdisciplinary in nature and will host leading researchers as instructors who will be crucial in achieving the highest standards. Schools will equip the students with the technical know-how to excel in the field as well as the general skills in communication, presentation, and networking to succeed inside or outside the particle accelerator community.

To extend the impact of the schools and to provide long-lasting support to pyAML members and the international community at large, the **Action website** will include all training materials and will link to the specific page created for each conference, workshop or seminar event organized by the Action, news and links of relevant talks. Materials such as codes, examples, presentations, and links to the Action publications and related works will also be available in the pyAML Github [18] software repository.

**Transfer of knowledge:** Section 3.2.2 below describes the channels that will be used to disseminate knowledge to the general public. Here we focus on knowledge transfer within the network, within particle accelerator experts and more broadly, and to the wider community of stakeholders, including researchers, engineers, computing scientists, particle accelerator operators and private companies. All pyAML organised conferences and workshops will include events that are open to these groups. We will also submit papers to international conferences and journals, alongside specific conferences and professional journals / newsletters. To strengthen the long-term impact, WG1 will take specific steps to support knowledge transfer between 1) younger and experienced researchers, and 2) research and practice (operation of particle accelerators). pyAML will also develop specific channels to ensure intergenerational knowledge transfer. This will include mentorship for young researchers, including doctoral students, post-doctoral researchers and innovators. It will also include research visits across the network and co-leadership of WGs by experienced and young researchers, engineers, computing scientists, private companies experts or particle accelerator operators.

*Knowledge transfer to other sectors:* to support long-term knowledge transfer between research and practice, pyAML will develop training materials for educational organisations (e.g., universities) and online training materials that can be directly and freely accessed by stakeholders and general public.

**Career Development:** The Action will facilitate career development and enhance the personal competencies for participants, particularly YRIs and early-career participants. It will also ensure that participants from ICT countries benefit from increased involvement in EU funded research. The Action will cultivate interdisciplinary research skills and help participants connect with audiences and networks beyond their usual domains. By fostering collaboration among peers within a robust network of experts, the Action will pave the way for future joint funding applications beyond the duration of the Action. Young Researchers and Innovators (YRIs) will have the chance to develop their leadership skills by leading and co-leading WGs and specific activities. In addition, YRIs will be strongly encouraged to undertake STSMs, and present at conferences and dissemination events.

### PLAN FOR DISSEMINATION AND/OR EXPLOITATION AND DIALOGUE WITH THE GENERAL PUBLIC OR POLICY

The main methods used for dissemination will include: 1) electronic communication, 2) face-to- face- events, 3) code releases and 4) publications. These plans will be reviewed on a regular basis throughout the Action.

1) **Electronic communication**:

* The Action will create a public website as a central hub for information and resources created through the Action.
* Social media channels will be used to publicize events to potential stakeholders, encouraging participation in WGs, workshops, stakeholder conferences, meetings, and training schools.
* Social media will also be used to maximize dissemination of knowledge and results. The platforms used will be actively reviewed. We will use Github, Mattermost, and email mailing lists as they are most widely used by the involved stakeholders.
* Public awareness will be achieved through media communication and announcements from the Action members. Newsletters on the action website will also support this aim.

2) **Face-to-face events**

* WG conferences will be organized to discuss the progress of the developments and the test results at accelerator facilities. A Final Conference will present the results of the pyAML Action. These conferences will be in-person meetings but will have an option to attend virtually and follow via online live streaming (Zoom meetings).
* Annual meetings and participation in international conferences (both academic and particle accelerators operation-based) will facilitate further exchange of knowledge among Action members and a wider audience.
* WG meetings will take place twice per year and serve to enhance communication among the members of the Action and local audiences.
* Eight half-day workshops, connected to STMSs, will be organized in different geographical regions and online with stakeholders. The workshops will present and discuss the ongoing work of the WGs.

3) **Code releases**

* Specific code release will be scheduled to distribute stable and tested software.
* Documentation and training will be available online (via the Action website or the Action code repository) at each release.

4) **Publications**

* The WGs will produce reports on the state-of-the-art, recommendations on technology to develop accelerator tuning tools based on common accelerator middle layer software and strategies/research methodologies for effective implementation of these software tools.
* To ensure broad awareness within the scientific community, we will publish open-access peer- reviewed articles. The articles will be shared on the website and in open-access journals and published through social media, electronic newsletters, and traditional media.
* To increase the reach of our publications with the public we will also create executive summaries, press releases, infographics, and media output in collaboration with the communication experts of the Action members laboratories.

4) **Trainings**

* The Training schools will produce materials that will be made available to the public via the web site of the Action and on the Action’s Github code repository.

In addition to the above online dissemination activities, pyAML will also endeavour other types of live activities to engage with the general public in different scenarios:

**School visits, interviews, and educational resources:** We will promote among Action members the need to interact with school/high school teachers and pupils to inspire the next generation of educators and scientists. To this end, we will encourage dissemination talks in schools, participation in online “Play with a synchrotron” events (enabled by the pyAML digital twin technology), and the development of educational resources with up-to-date information on the Action’s activities.

# IMPLEMENTATION

## COHERENCE AND EFFECTIVENESS OF THE WORK PLAN

### DESCRIPTION OF WORKING GROUPS, TASKS AND ACTIVITIES

The primary activities of pyAML Action will be carried out through the establishment of four Working Groups (WGs). Three thematic Working Groups (WGs 2-4 below) will support progress beyond the state of the art in key areas: WG2 middle layer, calibrations and digital twin; WG3 tuning tools and commissioning simulations; WG4 operational aspects. Bridging and connecting each of these thematic groups, the Action will include a Core Group (WG1) which will foster collaboration and drive the core principles embodied by the network. Short-term Scientific Missions (STSMs) and Training Schools will be organized throughout the Action, with the objective of promoting collaborations, enhancing capacity, and the development of Young Researchers and Innovators (YRIs) and other stakeholders.

Working Group 1: Inclusion, YRI engagement, inter-disciplinary innovation, impact and dissemination

WG1 will maintain the core objectives of pyAML and ensure that they are enacted in all WGs, activities and STSMs. It will include representatives of all other WGs and members of the Management Committee. It will also include YRI and representatives of diverse stakeholders in the particle accelerators research ecosystem. The core activities which will be enacted and supported by WG1 are:

Task 1.1: Involvement and co-design by YRI: Reviews of prior work on particle accelerator tools development highlight a fair representation of YRI in the research and development processes, often pursued by PhD and PostDoc research activities. YRI-involvement will remain central to pyAML. YRI-led hackathons and design sprints (D1.1) will be employed to support this objective.

Task 1.2: The objectives of the pyAML network are ambitious. To achieve them WG1 will bring together during Training Schools and Annual Meetings (M1.1, M1.2, M1.3, D1.2) a pan-European network that is interdisciplinary and intersectoral, balanced in skills, experience, and perspectives, and including a wide range of stakeholders.

Task1.3: WG1 will also focus on disseminating the findings and recommendations of the network and ensuring that it achieves the desired short and long-term impacts. It will be responsible for managing the overall impact and dissemination program, ensuring that stakeholders across Europe have the opportunity to benefit from our knowledge exchange and network building initiatives. Key outputs of WG1 in this sense will be the creation of the Action website (D1.3) and a set of training materials that can be used by educational organisation spanning disciplines, including physics and software engineering.

Task1.4: During the lifetime of the COST Action, WG1 in collaboration with other WGs will promote collaborative funding applications (D1.4). The Action website will include a space dedicated to sharing opportunities across countries, including opportunities focusing on career development of early-career participants and Young Researchers and Innovators (YRIs). This will ensure a strategy oriented to the future that allows for the introduction of new initiatives throughout the life of the Action, also paving the way for future implementation with the involvement of early-career participants, young researcher innovators, and entrepreneurs, fostering the long-term impact of the network.

Working Group 2: Middle Layer, calibrations and digital twin

This working group will be devoted to the central activity of pyAML: creating a **middle layer** software that will make an abstraction of the specific control system (TANGO, EPICS, DOOCS, etc…), of the specific particle accelerator (linear, circular, ramped, fixed energy, etc…) and of the naming convention of components. It will also provide access to a digital twin and the possibility to operate in physics or hardware units.

Task 2.1: WG2 will define a python accelerator middle layer code for all subsequent developments. WG2 will be in charge of all updates to the main core of the pyAML software. The first version will be shared as soon as possible for tests and feedbacks (D2.1) after a common definition of the specifications list (M2.0). The code will be enhanced, reviewed and possibly totally changed if needed in later stages. A new release will be done at least every 12 months (M2.1, M2.2, D2.4) including the changes and improvements requested by the other WGs.

Task 2.2: Initially the middle layer will be assumed to work in physics units, in a later stage an additional **calibrations** package will be designed to translate physics units (T, m, eV, etc) to hardware units (Ampere, Volts, etc…). This calibration package will enable from simple linear calibrations to complex combined function magnets calibrations that involve multiple fields for multiple power supply inputs (D2.2).

Task 2.3: The middle layer will also enable **digital twin** mode. The WG will assess how to implement this feature and if possible provide a way to choose the simulation engine behind the digital twin (D2.3). pyAT will be an obvious choice for storage rings, but elegant [19] or Opal [20] could be a better solution for linear accelerators.

Task 2.4: WG2 will then focus on **documentation**, **maintenance** and set up of CI/CD features in the code source of the above components. It will also do all necessary **updates** to the code as requested and agreed with the other WGs.

Working Group 3: Tuning tools and commissioning simulations

The WG3 will be in charge of building the tools that users will interact with for real experiments, measurements and tuning of the accelerators. Initially the middle layer software will not be available, but commissioning simulations tuning scripts will be developed such to be used with the software developed by WG1. This group is also in charge or providing a **commissioning-simulation mode** for the pyAML project. All along the development, feedback and exchange with WG2 will be necessary.

Task 3.1 (tuning tools): develop basic tuning tools such as (but not limited to): tune correction, orbit correction and chromaticity correction (D3.1). Assure that this software may be used within the pyAML middle layer software (M3.1). Test the individual actions for a circular accelerator, linear accelerator, ramped energy accelerator and a transfer line (if applicable) by using the digital twin mode of the pyAML middle layer software (M3.2). Include the basic tuning tools in the main code repository (D3.2). Develop more advanced tuning tools such as (but not limited to): Beam Based Alignment (BBA), Linear Optics from Closed Orbit (LOCO), Badger/Xopt optimizations (Machine learning and Artificial intelligence) (M3.7). Test using pyAML middle layer in digital twin mode and in commissioning simulations mode (M3.8). Include the advanced tuning tools in the main code repository (D3.4).

Task 3.2 (pyAML tuning tools sequencing and commissioning-simulation mode): Develop or chose a sequencer software to perform the above corrections in a sequence (M3.3). Test the sequence of actions for a circular accelerator, linear accelerator, ramped energy accelerator and a transfer line (if applicable), using the digital twin mode of the pyAML middle layer software (M3.4), Define how to interact with computing clusters (M3.5). Enable commissioning simulations mode: use the tools developed in Task 3.1 in a sequence to run commissioning simulations on a large number of alignment gradient and diagnostics error scenarios (D3.3). Save all instances of corrected lattices such that their performance in terms of lifetime, injection efficiency, transmission efficiency, etc.. may be evaluated (M3.9). Add sequencing of tuning tools to main code repository (D3.5).

Working Group 4: Operational aspects

WG4 will be in charge of testing the code at real machines and looking at the most operational aspects of the pyAML software. It will be in charge of the test of the tools defined by WG3, of the design of corresponding user interfaces, of data formats, of archiving, of anomaly detection and of the tools for set up of different optics for a given accelerator.

Task 4.1: test the code developed by WG3 within the infrastructure provided by WG2 at different laboratories (YRI in STSM for this scope). Test in at least 3 facilities at most 6 months after every release (M4.1, M4.2, D4.1).

Task 4.2: design at least one basic “thin” (no beam dynamics computations within the interface) user interface. Eventually compare different possible options for graphical interfaces. Evaluate if graphical interfaces should be provided with the pyAML software or not (D4.2).

Task 4.3: evaluate available software for data archiving and access (for example Tiled [21]) and propose modifications to the data formats proposed by WG3 for saved data. Make sure FAIR principles are enforced in data formats (D4.3). Contribute to WG2 developments to obtain this result.

Task 4.4: set up a software to perform slow and fast feedbacks for orbit correction. Evaluate speed rates and provide feedback to WG2 for potential bottlenecks (D4.4).

Task 4.5: compare the data collected from Task 4.1 during real experiments with data obtained from the digital twin mode of the pyAML software to define if they are usable for anomaly detection. Provide feedback to WG2. (D4.5)

### DESCRIPTION OF DELIVERABLES AND TIMEFRAME

Table 4 below lists the deliverables and milestones in chronological order. Several deliverables of WG3 and WG4 are made possible by milestones of WG2 (see GAANT chart in Sec 4.1.4).

|  |  |  |
| --- | --- | --- |
|  | **Description (D=deliverable, M=Milestones)** | **Month** |
| D1.3 | Website | 3 |
| M2.0 | Middle layer software specifications | 3 |
| D2.1 | First version of python accelerator middle layer (pyAML) software + license | 6 |
| M3.1 | Ensure basic tuning tools may be interfaced with D2.1 | 6 |
| D3.1 | Basic tuning tools: orbit, tune, chromaticity | 9 |
| M1.1 | Annual meeting + training school + report/minutes/training materials | 9 |
| D1.1 | YRI-led hackathons and design sprints | 12 |
| M3.2 | Test basic tuning tools in digital-twin mode | 12 |
| M4.1 | Test D2.1 in at least 3 laboratories | 12 |
| D3.2 | Include basic tuning tools in main code repository | 15 |
| M3.3 | Develop/choose a sequencer for tuning actions | 15 |
| D4.3 | Data formats and FAIR principles | 18 |
| M2.1 | Middle layer software update release | 18 |
| M3.4 | Test sequence of tuning actions for several accelerators | 18 |
| M1.2 | Annual meeting + training school + report/minutes/training materials | 21 |
| M3.5 | Define how to interact with a computing cluster | 21 |
| D2.2 | Calibrations software | 24 |
| D3.3 | Run D3.2 tools as a commissioning sequence on cluster | 24 |
| M4.2 | Test M2.1 in at least 3 labs | 24 |
| D4.2 | Test of at least one GUI, decision to use GUIs or not. | 30 |
| D4.5 | Anomaly detection | 30 |
| M2.2 | Middle layer + calibration software update release | 30 |
| M3.7 | Advanced tuning tools: BBA, LOCO, Badger | 30 |
| M1.3 | Annual meeting + training school | 33 |
| M3.8 | Test advanced tuning tools: BBA, LOCO, Badger in digital-twin and commissioning-simulations mode | 33 |
| D2.3 | Variable engine digital twin | 36 |
| D3.5 | Include advanced tuning tools in main code repository | 36 |
| D4.4 | Slow/fast feedbacks | 36 |
| M4.3 | Test M2.2 in at least 3 labs | 36 |
| M3.9 | Run sequence of tuning actions (basic and advanced) in commissioning-simulations mode, store files for evaluation | 39 |
| D3.4 | Add sequencing and commissioning-sequence mode to main repository | 42 |
| M2.3 | Middle layer + calibration + digital twin software update release | 42 |
| D4.1 | Test M2.2 + feedbacks + anomaly in at least 3 labs | 45 |
| D1.2 | Final meeting | 48 |
| D1.4 | Promote, organize and eventually submit collaborative funding applications | 48 |
| D2.4 | Middle layer + calibration + digital twin software update major release, including doc, CI/CD, tests, examples | 48 |

**Table 4: Deliverables and Timeframe of the pyAML network**

### Risk analysis and Contingency Plans

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
|  |  |  | Risk Ranking of impact | | |
|  |  |  | Minor | Moderate | Major |
| Risk outcome | probability | | 1 | 2 | 3 |
| Low | Likely | 3 | 3 | 5 | 6 |
| Medium | Possible | 2 | 2 | 4 | 5 |
| high | Unlikely | 1 | 1 | 2 | 3 |

|  |  |  |  |
| --- | --- | --- | --- |
| Risk | Impact/ Probability | Risk score | Contingency plans |
| Lack of understanding between disciplines or sectors (medium) | 3/1 | 3 | The Action Chair, Vice-Chair, MC members, and WG leaders will leverage their expertise to support communication and shared understanding. WG leaders have experience of fostering multidisciplinary work and connecting researchers from different backgrounds. |
| Disruption to knowledge sharing and the exchange of information (low) | 2/1 | 2 | The diverse range of activities may lead to interruptions in the network's knowledge and information flow. To prevent this, the MC will maintain communication among members, ensuring regular meetings and clear communication of objectives and timelines. |
| Low quality deliverables and outputs (medium) | 3/1 | 3 | Standard software development procedures will be enforced, such as peer-reviewed pull-requests and continuous integration tests. Should this problem appear, participants will be asked to improve the deliverable, if needed with the help of other WG members and eventually external experts. |
| Delay in the production of deliverables (high) | 3/2 | 5 | Agree due dates in advance. Provide reminders and propose solutions. The WG leaders and MC will ensure that deadlines are respected. Should delays continue to occur a substitute within the Action will be assigned to the task. |
| Conflicts (low) | 2/1 | 2 | Should a conflict emerge among two or more partners, the MC will act to mediate and to find a solution. In case the conflict persists, an ad-hoc crisis committee will be established with the support of the COST Association, possibly involving external expert to reach a solution |
| Low participation in WG meetings, conferences (low) | 2/1 | 2 | Given the response to the invitation to join the COST Action proposal, the likelihood of this risk is low. Should it happen, the MC will foster targeted engagement efforts. Scheduled meetings will take place involving WG leaders and participants, with the purpose of strengthening or modifying the project plan as needed to ensure that all participants can make meaningful contributions. |
| Low involvement of PhD students and YRIs (Low) | 2/1 | 2 | COST Action members will clarify the benefits of involvement, emphasizing networking and mentorship opportunities. All MC members are encouraged to involve early-career participants and YRIs. |
| CG members leave network (low) | 2/1 | 2 | When members leave, a replacement will be identified promptly from MC or MC Substitution List, while considering geographical, gender and age balance. |

**Table 5: Risks and contingency plans of the pyAML network**

### GANTT Diagram

