**Memorandum of Understanding between**

**EGI.eu and the European eInfrastructures Observatory (e∙nventory)**

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# Background

The Stichting European Grid Initiative Foundation (hereafter referred to as “EGI.eu”) has been created under the Dutch law with the mission to create and maintain a pan-European Grid Infrastructure in collaboration with its Participants, i.e. the National Grid Initiatives (NGIs), and Associated Participants (e.g. European International Research Organisations - EIROs) in order to guarantee the long-term availability of a generic e-infrastructure for all European research communities and their international collaborators. In its role of coordinating grid activities between European NGIs EGI.eu will: 1) operate a secure integrated production grid infrastructure that seamlessly federates resources from providers around Europe; 2) coordinate the support of the research communities using the European infrastructure coordinated by EGI.eu; 3) work with software providers within Europe and worldwide to provide high-quality innovative software solutions that deliver the capability required by our user communities; 4) ensure the development of EGI.eu through the coordination and participation in collaborative research projects that bring innovation to European Distributed Computing Infrastructures (DCIs). A summary of EGI.eu is attached as Annex 1.

The e∙nventory project (hereafter referred to as e∙nventory), partially funded by the European Commission under the 7th Framework Program, has a mission to launch the European eInfrastructures Observatory, a single-entry-point and one-stop-shop data warehouse, capable of representing multiple primary and convoluted indicators and benchmarks as a yardstick tool for progress monitoring and impact assessment of eInfrastructures at regional and national level across the European Union and beyond. A summary of e∙nventory is attached as Annex 2.

There are no e∙nventory partners that are directly represented in the EGI Council, but the following organisation is indirectly represented in the EGI Council through the NGI representatives:

* NKUA (Greece)

# Article 1: Purpose

The purpose of this Memorandum of Understanding (MoU) is to define a framework of collaboration between EGI.eu and e∙nventory (hereafter also referred to as “the Party” or the “Parties”). The Parties recognise, by this MoU, the opening of a wider and longer-term cooperation in activities which will bring visible benefits.

# Article 2: Joint Work plan

The parties contribute to enable the vision of providing European scientists and international collaboration for sustainable eInfrastructures to support their work. In this broad context, the specific goals of the collaborations are to:

* Share current and historical data related to NGI Key Performance Indicators (KPIs), to the extent that such data exists and/or is accessible by the Parties, in order to represent the grid development/deployment progress at national level across EU and beyond.
* Exchange ideas, discuss, and potentially suggest additional European Grid KPIs in order to represent the grid development/deployment progress and/or impact of such progress, at a Pan-European level and beyond.
* Assess and provide feedback on the functionality, user-friendliness and long-term sustainability of the European eInfrastructures Observatory currently in development in order to identify mutually beneficial synergies between the Parties.
* Establish joint dissemination activities to increase awareness and promote the results of the collaboration.

The specific activities to be carried out in the framework of the collaboration are[[1]](#footnote-1):

|  |
| --- |
| **A.1 NGI KPIs and data****Parties Involved:** EGI.eu Chief Operations Officer (Tiziana Ferrari); e∙nventory WP2 (Name, Org.)**Description of work:** EGI.eu to share current and past available (tracing back as much as possible) data for specific NGI KPIs that have been identified by e∙nventory, namely (1) No. of CPUs, (2) Storage space and (3) NGI budgets. e∙nventory will undertake to properly portray in the European eInfrastructures Observatory the respective data in order to represent grid development/deployment progress at national level across EU and beyond.**Expected outcome:** European eInfrastructures Observatory populated with selected NGI KPIs data, representing the NGI development progress over time, referencing EGI.eu as data source.* M1.1: e∙nventory provides a structured document for desired information related to NGI KPIs, which will be populated by EGI.eu.
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| **A.2 EGI KPIs and data****Parties Involved:** EGI.eu Chief Operations Officer (Tiziana Ferrari); e∙nventory WP3 (Name, Org.)**Description of work:** Exchange ideas, discuss, and potentially suggest European Grid KPIs in order to represent the grid development/deployment progress and/or impact of such progress, at Pan-European level and beyond. Such KPIs could include (but not limited to) Production Grid sites (e.g. number and growth over time), Thematic Grids for scientific communities (e.g. number and growth over time), etc. If such data will be made available via EGI.eu, e∙nventory will undertake the properly portrayal of EGI KIPs in the European eInfrastructures Observatory.**Expected outcome:** European eInfrastructures Observatory populated with selected EGI KPIs data, representing the European Grid development progress over time, referencing EGI.eu as data source.* M2.1: Initial meeting held offering an opportunity to focus required contributions for targeted results and streamlined effort. (e.g. EGI.eu offices or mutually beneficial community event)
* M2.2: e∙nventory provides a structured document for desired information related to EGI KPIs, which will be populated by EGI.eu.
* M2.3: e∙nventory provides an analysis report regarding EGI KPIs within the European eInfrastructures Observatory.
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| **A.3 Platform functionality****Parties Involved:** EGI.eu Technical Manager (Michel Drescher); e∙nventory WP5 (Name, Org.)**Description of work:** EGI.eu to assess and provide feedback on the functionality and the user-friendliness of the European eInfrastructures Observatory. e∙nventory will provide EGI.eu with full access to the restricted section of the European eInfrastructures Observatory in order for EGI.eu to test the developed tools and representation of grid KPIs. **Expected outcome:** European eInfrastructures Observatory incorporates potential feedback/enhancements suggested from EGI.eu.* M3.1: EGI.eu provides an assessment of the European eInfrastructures Observatory.
* M3.2: Access to the restricted section of the European eInfrastructures Observatory is provided to EGI.eu.
* M3.3: EGI.eu tests the developed tools and representation of grid KPIs.
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| **A.4 Long-term collaboration****Parties Involved:** EGI.eu Policy Development Manger (Sergio Andreozzi); e∙nventory WP5 (Name, Org.)**Description of work:** e∙nventory to disclose its exploitation plan and plan for continuation of its activities to EGI.eu. Following that, discussions between EGI.eu and e∙nventory will take place in order to define possible long-term cooperation (indicatively: process for sustainable collection of selected KPIs’ data, process for sustainable validation of selected KPIs’ data, potential cross-licensing of e∙nventory tools to EGI.eu, etc.).**Expected outcome:** Longer-term collaboration framework established between EGI.eu and e∙nventory.* M4.1: e∙nventory provides EGI.eu with its exploitation plan and plan for continuation of its activities.
* M4.2: Final sustainability and long-term collaboration opportunities are discussed, defined and documented.
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| **A.6 Dissemination****Parties Involved:** EGI.eu Dissemination Manager (Catherine Gater); e∙nventory WP5 (Name, Org.)**Description of work:** Disseminate the progress and results of the collaboration.**Expected outcome:** Wide spread dissemination of information resulting from the collaboration.* M5.1: Advertise the start of the collaboration in each party’s website with a dedicated static page, article and/or press release.
* M5.2: Annual summary of the visibility/publications regarding the progress and/or results of the collaboration (e.g. presentation at EGI and e∙nventory events, joint press release/article, contribution to project annual reports) is documented.
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# Article 3: Timeline and Reporting

The EGI.eu Policy Development Team (PDT) will coordinate the periodic review of the progress of the activities defined in Article 2 (Joint Work Plan), follow-up the milestones defined below and distribute reports to both Parties. Special meetings between the points of contact designated under Article 4 (Communication) shall be held, as often as necessary, to examine the progress in the implementing of this Agreement.

|  |  |  |
| --- | --- | --- |
| Date | Activity | Additional Information |
| M1 | M5.1 | Advertise the start of the collaboration (e.g. dedicated static page, article and/or press release). |
| MM/YYYY | M#.# |  |
| MM/YYYY | M#.# |  |
| MM/YYYY  | M#.# |  |
| MM/YYYY | M#.# |  |
| MM/YYYY | M#.# |  |
| MM/2012 | M5.2 | Summary of the visibility/publications regarding the progress and/or results of the collaboration. |
| MM/2013  | M5.2 (update) | Summary of the visibility/publications regarding the progress and/or results of the collaboration. |
| MM/2014 | M5.2 (update) | Final summary of the visibility/publications regarding the progress and/or results of the collaboration. |

# Article 4: Communication

The Parties shall keep each other informed on all their respective activities and on their progress and shall consult regularly on areas offering potential for cooperation.

Joint working groups may be established to examine in detail proposals in areas assigned to them by the Parties referred to in Article 2 (Joint Work Plan) and to make recommendations to the Parties.

Each Party shall designate a “point of contact” that shall be responsible for monitoring the implementation of this MoU and for taking measures to assist in the further development of cooperative activities. Such points of contact shall be the ordinary channel for the Parties' communication of proposals for cooperation

The primary point of contact for each Party is:

 EGI.eu: Sergio Andreozzi (sergio.andreozzi@egi.eu)

 e∙nventory: Nikos Vogiatzis (n.vogiatzis@enventory.eu)

Questions of principle or problems that cannot be solved at primary contact level are escalated to the EGI.eu Director and the e∙nventory Project Coordinator.

# Article 5: Rights and Responsibilities

The procedure is set out in Annex 3.

# Article 6: Funding

Each Party shall bear the costs of discharging its respective responsibilities under this MoU, including travel and subsistence of its own personnel and transportation of goods and equipment and associated documentation, unless otherwise agreed in this MoU.

Each Party shall make available free of charge to the other Party any office/meeting space needed for the joint activities.

The Parties' obligations hereunder are subject to their respective funding procedures and the availability of appropriated funds. Should either Party encounter budgetary problems in the course of its respective internal procedures that may affect the activities carried out under this MoU, that Party shall notify and consult with the other Party in a timely manner in order to minimise the negative impact of such problems on the cooperation. The Parties shall jointly look for mutually agreeable solutions.

In order to reduce the impact on travel costs, face-to-face meetings should be co-located with other events where participants are likely to attend. Meeting via teleconferences should be considered when the nature of the discussion does not strictly require a face-to-face presence.

# Article 7: Entry into force, duration and termination

This MoU will enter into force when signed by the authorised representatives and shall remain in force until completion of the activities identified in Article 2 (Joint Work Plan), or upon termination of the projects in which the Parties participate, or upon three (3) months prior written notice by one Party to the other. In the event of termination, the parties shall endeavour to reach agreement on terms and conditions to minimise negative impacts on the other Party. In the event of the continuation of the present cooperation, the Agreement may be extended and/or amended by mutual agreement in writing.

# ARTICLE 8: AMENDMENTS

The MoU may be amended by written agreement of the Parties. Amendments shall be valid only if signed by the authorised representatives of the Parties.

# Article 9: Annexes

Annexes 1, 2, 3 and 4 attached hereto have the same validity as this MoU and together constitute the entire understanding and rights and obligations covering the cooperation accepted by the Parties under this MoU. Annexes may be amended following the provisions of Article 8 (Amendments).

# Article 10: Language

The language for this MoU, its interpretation and all cooperative activities foreseen for its implementation, is English**.**

# Article 11: Governing Law - Dispute resolution

The terms of this MoU shall be interpreted in accordance with their true meaning and effect independently of national and local law. Provided that if and insofar as this MoU does not stipulate, or any of its terms are ambiguous or unclear reference shall be made to the substantive laws of Belgium. Disputes shall be resolved by amicable settlement or failing which by arbitration in accordance with the procedure set out in Annex 4.

**Memorandum of Understanding between EGI.eu and e∙nventory**

IN WITNESS WHEREOF, the Parties have caused their duly authorised representatives to sign two originals of this Memorandum of Understanding, in the English language.

The following agree to the terms and conditions of this MoU:

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| --- | --- |
| ­­­­­­­­­­­\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_Dr. Steven NewhouseEGI.eu Director­­­­­­­­­­­\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_Date | ­­­­­­­­­­­\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_Dr. Jorge-A. Sanchez-P.e∙nventory Project Coordinator­­­­­­­­­­­\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_Date |

**EGI.eu Description**

To support science and innovation, a lasting operational model for e-Infrastructure is needed − both for coordinating the infrastructure and for delivering integrated services that cross national borders. The objective of EGI.eu (a foundation established under Dutch law) is to create and maintain a pan-European Grid Infrastructure in collaboration with National Grid Initiatives (NGIs) in order to guarantee the long-term availability of a generic e-infrastructure for all European research communities and their international collaborators.

In its role of coordinating grid activities between European NGIs, EGI.eu will:

* Operate a secure integrated production grid infrastructure that seamlessly federates resources from providers around Europe.
* Coordinate the support of the research communities using the European infrastructure coordinated by EGI.eu.
* Work with software providers within Europe and worldwide to provide high-quality innovative software solutions that deliver the capability required by our user communities.
* Ensure the development of EGI.eu through the coordination and participation in collaborative research projects that bring innovation to European Distributed Computing Infrastructures (DCIs).

The EGI.eu is supporting ‘grids’ of high-performance computing (HPC) and high-throughput computing (HTC) resources. EGI.eu will also be ideally placed to integrate new Distributed Computing Infrastructures (DCIs) such as clouds, supercomputing networks and desktop grids, to benefit the user communities within the European Research Area.

EGI will collect user requirements and provide support for the current and emerging user communities. Support will also be given to the current heavy users of the infrastructure, such as high energy physics, computational chemistry and life sciences, as they move their critical services and tools from a centralised support model to one driven by their own individual communities.

The EGI community is a federation of independent national and community resource providers, whose resources support specific research communities and international collaborators both within Europe and worldwide. EGI.eu, coordinator of EGI, brings together partner institutions established within the community to provide a set of essential human and technical services that enable secure integrated access to distributed resources on behalf of the community.

The production infrastructure supports Virtual Research Communities − structured international user communities − that are grouped into specific research domains. VRCs are formally represented within EGI at both a technical and strategic level.

**e∙nventory Description**

The e∙nventory project targets the formation of the European eInfrastructures Observatory, a single-entry-point and one-stop-shop data warehouse, capable of representing multiple primary and convoluted indicators and benchmarks, and a yardstick tool for progress monitoring, impact assessment, post-mortem analysis and ex-ante evaluation of eInfrastructures at regional and national levels across the European Union and beyond.

The aim of the e∙nventory project is to carry out a design study that will set the grounds towards the European eInfrastructures Observatory; through the collection and utilisation of appropriate indicators, the project will be able to monitor the status quo and evolution over time of eInfrastructures development and communicate all findings to related stakeholders but also to the public-at-large, in a seamless and impartial way.

The e∙nventory project will carry out consultation with eInfrastructures stakeholders and research and innovation indicator experts and will extend previous benchmarking efforts (e.g. EARNEST) by including an extensive set of eInfrastructures components (i.e., computing, communication and services), eventually deploying a prototype web platform dealing with a critically-selected subset of indicators, through intuitive, interactive and user-friendly mappings, plots and graphics.

The project action plan is structured so that it can achieve:

* Identification of a core set of benchmarking indicators for the European eInfrastructures Observatory that will be the baseline for monitoring eInfrastructures development progress.
* eInfrastructures stakeholders’ feedback and consensus on the proposed structure and functionality of the European eInfrastructures Observatory.
* European eInfrastructures Observatory functionality demonstration through a prototype web platform that will be available to all eInfrastructure communities and to the general public.

The e∙nventory project responds to the need of eInfrastructure stakeholders by delivering a prototype tool to aid impact assessment of related eInfrastructure initiatives and programmes. In that respect, the user communities that will effectively use the European eInfrastructures Observatory as a yardstick tool and translate the project outputs into a real influence on eInfrastructure policy, are the eInfrastructure stakeholders themselves, including:

* The European Parliament, the European Commission and National Governments that are sponsoring eInfrastructure initiatives and place a high value in their policy agenda on the impact assessment, post-mortem analysis and ex-ante evaluation, to help design better and more successful future eInfrastructure programmes.
* Research funding bodies that plan the development of strategies to address the digital divide and digital opportunity issues and need to utilise and assess the impact of eInfrastructures contributing to this goal.
* eInfrastructure policy bodies that have a clear mandate of supporting the development and the sustainability of eInfrastructures and need an impact assessment tool to monitor the progress of achieving their objectives.
* eInfrastructure projects that carry out specific eInfrastructure activities and need to monitor their impact during deployment as well as retrospectively.
* Scientific/research communities that are empowered by eInfrastructures and are eager to comprehend their strengths and weaknesses that influence their everyday work.

The e∙nventory project is co-financed by the European Commission's Seventh Framework Programme for Research Infrastructures.

**Rights and Responsibilities**

1. GENERAL

1. e∙nventory agrees to adhere to applicable policies and procedures relating to the use of the production infrastructure.

2. A Party which makes material, equipment or components available to the other Party, for the purposes of activities under this MoU shall remain the proprietor of such material, equipment or components.

3. Each Party shall remain fully responsible for its own activities, including the fulfilment of its obligations under any grant agreement with the European Commission or under any consortium agreement related thereto.

1. PERSONNEL

1. Each Party shall be solely responsible for any personnel hired to carry out work under this MoU.

2. In case personnel employed by one Party temporarily carries out work under this MoU on the premises of another (hereafter referred to as “secondment”), the following provisions shall apply:

(a) The persons seconded shall be subject to all regulations, including, in particular, safety regulations, applicable on the site of the Party they are seconded to.

(b) The personnel seconded by a Party to another shall remain employees of the Party having seconded them and such Party, as employer, shall bear exclusive responsibility for the payment of salary and for the procurement of adequate social security and insurance, including third party liability insurance and health insurance.

(c) Unless otherwise agreed by the Parties concerned, Intellectual Property Rights generated by personnel seconded by a Party to another shall be owned by the Party having seconded such personnel.

1. INTELECTUAL PROPERTY RIGHTS AND LICENSE

1. "Intellectual Property Rights" shall mean all intellectual creations including but not limited to inventions, know-how, layouts, drawings, designs, specifications, computer programs, reports, processes, protocols, calculations and any other matter and protected by intellectual property rights, whether registered or not, including patents, registered designs, copyrights, design rights and all similar proprietary rights and applications for protection thereof.

2. Intellectual property rights generated by a Party under this MoU shall be the property of that Party who shall be free to protect, transfer and use such Intellectual Property Rights as it deems fit.

3. Notwithstanding the foregoing each Party shall grant the other a non-exclusive royalty free, perpetual license to use the Intellectual Property Rights generated by it under this MoU for use within its project or for the exploitation the results thereof. Such license shall include the right to sublicense the entities involved in the project.

1. JOINTLY OWNED RESULTS

1. Results that were jointly generated by both Parties will be jointly owned by the Parties, hereinafter referred to as (“Jointly Owned Results”) and each of the Parties shall be free to use these Jointly Owned Results as it sees fit without owing the other Party any compensation or requiring the consent of the other Party. Each Party, therefore, for example and without limitation, has the transferable right to grant non-exclusive, further transferable licenses under such Jointly Owned Results to third parties. Each Party shall be entitled to disclose such Jointly Owned Results without restrictions unless such Jointly Owned Results contain a Joint Invention in which case no disclosure must be made prior to the filing of a priority application.

2. With respect to any joint invention resulting from this MoU (i.e. any invention jointly made by employees of both Parties), the features of which cannot be separately applied for as Intellectual Property Rights and which are eligible for statutory protection requiring an application or registration (herein referred to as “Joint Invention”), the Parties shall agree on which Party will carry out any filling as well as any further details with regard to persecuting and maintaining of relevant patent applications.

1. PUBLIC RELATIONS

1. Any publication by a Party resulting from the activities carried out under this MoU shall be subject to prior agreement of the other Party not be unreasonably withheld.

2. EGI.eu and e∙nventory may each release information to the public, provided it is related only to its own part of the activities under this MoU. In cases where the activities of the other Party are concerned prior consultation shall be sought. In all relevant public relations activities, the contribution of each Party related to activities covered by this MoU shall be duly acknowledged.

1. CONFIDENTIALITY OF INFORMATION

1. The Parties may disclose to each other information that the disclosing Party deems confidential and which is (i) in writing and marked “confidential”, or (ii) disclosed orally, and identified as confidential when disclosed, and reduced in writing and marked “confidential” within fifteen (15) days of the oral disclosure (hereafter referred to as “Confidential Information”). Confidential Information shall be held in confidence and shall not be disclosed by the receiving Party to any third party without the prior written consent of the disclosing Party.

2. Notwithstanding the foregoing a Party is entitled to disclose Confidential Information which it is required by law to disclose or which, in a lawful manner, it has obtained from a third party without any obligation of confidentiality, or which it has developed independently from any Confidential Information received under this MoU, or which has become public knowledge other than as a result of a breach on its part of these confidentiality provisions.

1. LIABILITY

1. Each Party shall use reasonable endeavours to ensure the accuracy of any information or materials it supplies to the other Party and of any other contribution it makes hereunder and promptly to correct any error therein of which it is notified. The supplying Party shall be under no obligation or liability other than as stated above and no warranty or representation of any kind is made, given or to be implied as to the sufficiency, accuracy or fitness for a particular purpose of such information, materials or other contribution or as to the absence of any infringement of any proprietary rights of third parties through the possession or use of such information, materials or other contribution. The recipient Party shall be entirely responsible for its use of such information, materials or other contribution and shall hold the other Party free and harmless and indemnify it for any loss or damage with regard thereto.

2. Except in case of gross negligence or wilful misconduct, neither Party shall be liable for any indirect or consequential damages of the other Party, including loss of profit or interest, under any legal cause whatsoever and on account of whatsoever reason.

1. PARTICIPATION IN SIMILAR ACTIVITIES

1. Parties are not prevented by this MoU from participating and activities similar to those described in this document with third parties. There is no obligation to disclose any similar activity to the other party. However, when considered of mutual benefit, both parties are encouraged to involve the other party in similar activities to the goal of disseminating the knowledge about EGI.eu.

**Settlement of Disputes**

1. All disputes or differences arising in connection with this MoU which cannot be settled amicably shall be finally settled by arbitration in accordance with the procedure specified below which shall be adapted in the light of the number of Parties involved.

2. Within thirty (30) calendar days of written notification by a Party to the other Party of its intention to resort to arbitration, the first Party shall appoint an arbitrator. The second Party shall appoint an arbitrator within three (3) months of the appointment of the first arbitrator. The two arbitrators shall, by joint agreement and within ninety (90) calendar days of the appointment of the second arbitrator, appoint a third arbitrator, who shall be the Chairman of the Arbitration Committee.

3. If the second Party fails to appoint an arbitrator or the two arbitrators fail to agree on the selection of a third arbitrator, the second or, as the case may be, the third arbitrator, shall be appointed by the President of the Court of Justice of the European Communities.

4. Unless otherwise agreed by the Parties concerned within thirty (30) calendar days of the provision of notice referred to in Article 12 above, the arbitration proceedings shall take place in Brussels and shall be conducted in English. The Parties shall within one month of the appointment of the third arbitrator agree on the terms of reference of the Arbitration Committee, including the procedure to be followed.

5. The Arbitration Committee shall faithfully apply the terms of this MoU. The Arbitration Committee shall set out in the award the detailed grounds for its decision.

6. The award shall be final and binding upon the Parties, who hereby expressly agree to renounce any form of appeal or revision.

7. The costs including all reasonable fees expended by the Parties to any arbitration hereunder shall be apportioned by the Arbitration Committee between these Parties.

**Full and Detailed Contact List**

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| --- | --- | --- |
| **Role**  | **EGI.eu** | **e∙nventory** |
| Coordinator | EGI.eu DirectorSteven Newhousesteven.newhouse@egi.eu | e∙nventory Project CoordinatorJorge-A. Sanchez-P.email |
| Policy | EGI.eu Policy Development ManagerSergio Andreozzisergio.andreozzi@egi.eu | RoleNameemail |
| User Support | EGI.eu Chief Community OfficerSteve Brewersteve.brewer@egi.eu | RoleNameemail  |
| Training | Senior User Community Support Officer Gergely Siposgergely.sipos@egi.eu | RoleNameemail |
| Operations/Security | EGI.eu Operations ManagerTiziana Ferraritiziana.ferrari@egi.eu | RoleNameemail |
| Technical Coordination | EGI.eu Technical ManagerMichel Dreschermichel.drescher@egi.eu | RoleNameemail |
| Dissemination/Outreach | EGI.eu Dissemination ManagerCatherine Gatercatherine.gater@egi.eu | RoleNameemail |

These contact points may be the same person. The EGI.eu Policy Development Team (policy@egi.eu) is to be notified regarding any changes to the contact list.

1. Party leading the activity is underlined. [↑](#footnote-ref-1)