



COESO

connecting research and society

COLLABORATIVE ENGAGEMENT ON SOCIETAL ISSUES

WP7 - Communication and Dissemination Plan for the Exploitation and Dissemination of Results (PEDR)

Updated version (M36)

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Plan for the Exploitation and Dissemination of Results (PEDR)

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Contents

I. Introduction	4
II. Dissemination Plan	5
General Strategy	5
Horizon Results Booster services (part 1)	6
III. Data Management Plan	7
IV. Exploitation Plan	7
COESO objectives and related key exploitable results	7
Horizon Results Booster Services (part 2)	9
Key Exploitable Results (KERs) and Strategies	9
KER #1: VERA (Virtual Ecosystem for Research Activation)	9
KER #2: Mutual learning exercises (MLEs) for participatory research with the SSH	10
KER #3: Funding Advocacy	10
KER #4: Open Call Guidelines	11
KER #5: Cooperation Analytics	11
KER #6: “Exploring Citizen Science” podcast series	11
KERs from pilots	11
Prototype for a new MemoRekall version: MemoRekall-IIIIF (Pilot 2)	11
Caring Community Toolkit (Pilot 7)	12
IPR management	12
V. Conclusion	13

I. Introduction

This is an updated version of the draft Plan for the Exploitation and Dissemination of Results (PEDR) submitted in July 2021. As the first version was drafted very early in the project, all of the sections have been significantly updated. As its name implies, the report outlines the COESO project's plan for dissemination and exploitation of the project results. Accordingly, this introduction is followed by a chapter on the dissemination plan and then a chapter on the exploitation plan. Because the COESO project also has a specific [Data Management Plan](#) (COESO D1.2), as well as a [Communication and Dissemination Plan](#) (COESO D7.1) published March 2021 and a [Report on Dissemination Activities](#) (COESO D7.5), which comprehensively outline all of the dissemination plans and activities, most of this report is dedicated to defining the project's Key Exploitable Results (KERs) and the plan for their exploitation.

The COESO project (Collaborative Engagement on Societal Issues)¹ is a 3-year participatory research project, funded by the European Commission through a Science with and for Society grant, and supported by the OPERAS Research Infrastructure². The COESO project contributes to overcoming the obstacles that hinder the development of citizen science in the social sciences and humanities and facilitates and supports participatory research. The project develops the Virtual Ecosystem for Research Activation (VERA), a collaborative place for knowledge production and sharing, and collaborates with research funding organizations to enhance financial support for citizen science. At the heart of the project are ten citizen science pilots, representing a variety of social sciences and humanities disciplines, societal challenges and types of engagement with citizens in different European countries. The ten pilots address diverse societal issues: mass tourism, education and gender, resilient societies, fight against crime, societal change and migration, inclusivity in city planning, valorisation of aging people in communities, accessing and using local knowledge and leadership for policy making/implementation, raising awareness on climate change, and food insecurities of children. Overall, COESO serves as a meeting point between various European communities: the social sciences and humanities community, the citizen science community, as well as the open scholarly communication community. In this bridging endeavor, COESO is also synergising with existing communities such as Hypotheses.org³ and EU-Citizen.Science⁴. Moreover, it is exploring the frontiers of innovation in the social sciences and humanities' public engagement through mutual learning exercises with the pilot projects and through experimentations with multimedia research outputs. Furthermore, COESO is experimenting with how to measure and self-assess cooperative behavior by designing a framework and corresponding code for a proof of concept called *Cooperation Analytics*.

COESO has a devoted work package (WP7) for developing dissemination and communication strategies, tools, and procedures as well as an exploitation plan. COESO maximizes its impact through the actions described in this Plan for the Exploitation and Dissemination of Results (PEDR), which is based on: (1) the Communication and Dissemination Plan (developed within WP7); (2) the Data Management Plan (developed within WP1); and (3) in depth meetings on identifying Key Exploitable Results (KER) with key COESO consortium actors.

¹ See <https://cordis.europa.eu/project/id/101006325>

² See <https://www.operas-eu.org/>

³ See <https://hypotheses.org/>

⁴ See <https://eu-citizen.science/>

II. Dissemination Plan

General Strategy

For an effective and efficient dissemination of the project's results, the dissemination plan is linked strongly with the communication plan for the project. The COESO Communication and Dissemination Strategy⁵ was developed in Work Package 7 (WP7) within Task 7.1 and guided the COESO consortium in its internal and external communication and dissemination actions. Communication and dissemination are often overlapping areas but they can be differentiated:⁶ While communication actions address various audiences to inform about the project, its results, and its overall goals, dissemination activities have a narrower focus on audiences that use the results in their own work. Dissemination activities are designed to enable the further uptake and use of the project's results; however, successful dissemination requires good communication and it is difficult to separate the two activities. The section on dissemination within the Communication and Dissemination Strategy serves as one of the pillars of this PEDR and is summarized in the following paragraphs.

The dissemination plan defines the target audiences (within and outside of the project's consortium) that COESO wishes to reach and defines the respective dissemination measures. COESO's dissemination strategy targets those audiences that are most interested in the results of the project. The primary target group is composed of social sciences and humanities researchers and societal actors who are *already involved* in citizen science. Besides researchers, this includes, for example, journalists, artists and other independent stakeholders, small and medium enterprises, and non-profit organizations. The secondary target audience is that of funding organizations for citizen science projects as well as European policy makers on national, regional and local levels. The third target audience is made up of social sciences and humanities researchers and societal actors who are *not yet involved* in citizen science. Additional target audiences are researchers from other disciplines, research organizations and universities at large, service providers, such as libraries and infrastructure providers, etc., consortium members of other SwafS related projects, and the COESO and OPERAS consortia. All audience members for COESO's dissemination measures can fall into *more than one* of the categories described above. For a detailed matrix describing the target groups and dissemination measures, please consult the [COESO Communication and Dissemination Strategy](#) - pp. 23-25.

COESO results are disseminated in a variety of formats: scientific publications, reports on COESO-initiated events such as conferences and workshops, reports on events that the COESO consortium participates in and presents the project at, training and guideline materials, advocacy material, a podcast series, an online magazine series, as well as the project deliverables. All results are (unless specifically stated otherwise, as e.g. in the case of some confidential deliverables) published publicly on the COESO website and with permanent DOIs and open access through Zenodo.

⁵ Available at: <https://doi.org/10.5281/zenodo.4672541>

⁶ See: Executive Agency for Small and Medium-sized Enterprises (European Commission). "Making the most of your H2020 project: Boosting the impact of your project through effective communication, dissemination and exploitation." 2019. <https://op.europa.eu/en/publication-detail/-/publication/3bb7278e-ebf3-11e9-9c4e-01aa75ed71a1/language-en/format-PDF/source-164620962>

The communication channels (COESO website, Zenodo, social media, collaborative newsletter, contributions to other newsletters, final conference) and the calendar used for planning dissemination actions are described in detail in the [COESO Communication and Dissemination Strategy](#). At monthly “project coordination team” (management team and communication team) meetings, the plan is monitored and adjusted according to the project’s current needs. A detailed list of dissemination measures taken throughout the project, as well as an overview of the relevant Key Performance Indicators (KPIs) is provided in the [D7.5 Report on Dissemination Activities](#) (M36).

Horizon Results Booster services (part 1)

In an effort to enhance COESO’s dissemination strategy, COESO requested the Horizon Results Booster **Portfolio dissemination and exploitation strategy (PEDS) module A** (identification and creation of portfolio of R&I project results) service. This service identifies EU funded projects with similar target audiences and objectives, and then forms a group, collects information about their results and provides concrete ideas and support for joint dissemination activities. The resulting group was composed of the following projects: EnviroCitizen, TIME4CS, PRO-Ethics and SSHCentre. The final report offered a number of dissemination suggestions, but due to limited resources and different time constraints within each project, the group did not move forward on any of the ideas. However, through this process, the PRO-Ethics project and COESO project determined that coordinating a joint final conference would be beneficial to both projects to bring together diverse, but interrelated, stakeholders (funders, policy makers, citizen science practitioners and support services) to facilitate important discussions on supporting the growth of ethical collaborative research. The joint final conference entitled [Connect.Collaborate.Create: bridging communities to foster participatory research and citizen science](#) resulted in the participation of 170 stakeholders from around the world.

In August 2023, COESO was approached by the YouCount project to ask if we would like to participate with them in a PEDS module A service (YouCount was not included in the first round of module A, initiated by COESO). We chose to participate again in the service, this time with the YouCount project as the lead initiative and the Time4CS project. The team of projects, together with the service provider, identified the action of producing, through the **PEDS module B**, a joint video. The first version of the video was produced in December, and we did not find it met the expectations. Because of the time constraints with the project ending soon, we decided to remove COESO from the video project.

Additionally, between December 2022 and February 2023 COESO participated in the HRB **PDES module C** to identify our key exploitable results; and between April 2023 and July 2023, COESO participated in the HRB **Business Plan Development module** to develop a business plan for VERA. These activities are elaborated in Section IV - Exploitation Plan.

III. Data Management Plan

The Data Management Plan (DMP) was developed in Work Package 1 (WP1) within Task 1.2, originally released with the first draft of the PEDR. The updated DMP is being released in parallel with this deliverable. The DMP contributed to foresee the possible paths for the exploitation of the project outcomes: it includes information relating to the types of data the project generates and collects, the standards it makes use of, how data can be exploited and verified, whether there is any data that cannot be reused, and how the data will be curated and preserved.

The COESO DMP distinguished three bundles of data. Among these, two are potentially exploitable within the COESO framework: the research data produced during the project life within the work packages - among which the research data produced by the pilots, and the results' data, among which the VERA platform and other software code developed during the COESO project life.

Data FAIRification is a major step towards an efficient dissemination and exploitation of the project's results, and the COESO project team acted to address FAIRification challenges where relevant. Raw data of the pilots will not be made public: they didn't undergo a full FAIRification process and are not considered exploitable results from the COESO project perspective. The FAIRification of the VERA platform data is instead part of its development and includes FAIRification processes that were already implemented in other OPERAS services such as the GoTriple platform⁷.

IV. Exploitation Plan

COESO is a citizen science project involving partners coming from different sectors and professional areas, with a huge diversity in the organization sizes and governance structures. Within the monthly Work Package Leader meetings that took place throughout the project lifespan, time was devoted to identify the exploitation ambition of each partner involved in each KER. Exploitation ambitions may include network building, policy development, dissemination and further research, and the uptake of the VERA platform.

COESO objectives and related key exploitable results

Before diving into the details of COESO's Key Exploitable Results (KERS) or their corresponding exploitation plan, this section provides context to the reader by briefly recalling the project objectives and naming the corresponding exploitable project results. COESO's overall objective is to contribute to overcoming the obstacles that hinder the development of citizen science in the social sciences and humanities and to support the collaborations between researchers of these disciplines and socio-economic actors (e.g. journalists, artists and other independent

⁷ <https://www.gotriple.eu/>

stakeholders, small and medium enterprises, civil society organizations, etc.).

COESO's KERs are related to five of the six project objectives, which are listed here to show their relevance and are expanded on in the next section. The sixth objective - engaging with stakeholders from different socio-economic and cultural backgrounds - has been a cross-cutting one.

1. **Specifically support collaborative practices in social sciences and humanities citizen science projects** by developing a Virtual Ecosystem for Research Activation (VERA), which will provide a set of tools to discover potential partners - favourising partnerships between scientific establishments and citizens, to define and co-design the research activities, to co-create new knowledge and solutions, and to deliver them to society. The sustainability of the VERA platform beyond the project duration concentrated the main efforts in terms of business plan development, and it includes a training model component (here called "Mutual learning exercises" - KER#2), and partnership models with funders developed through KER#3 - Funding Advocacy.
 - a. Relevant KER: VERA platform
 - i. Exploitability timeline: 3rd year of project (2023) and ongoing after project
 - b. Relevant KER: Mutual learning exercises for participatory research with the SSH
 - i. Exploitability timeline: after project

2. **Collaborate with research funding organizations to enhance financial support** to citizen science projects in the social sciences and humanities. The results of the project actions towards funders can be exploited by funders themselves, research institutions and civil society to further enhance the science-society collaborations.
 - a. Relevant KER: Funding advocacy strategy
 - i. Exploitability timeline: 3rd year of project (2023) and ongoing after project
 - b. Relevant KER: Open Call for SSH citizen science projects guidelines
 - i. Exploitability timeline: after project

3. **Enable the experimentation on leveraging transmedia practices to engage the public** with social sciences and humanities research outputs that address societal challenges. The new methodologies applied during the project can be scaled up and exploited by external stakeholders.
 - a. Relevant KER: Prototype for a new MemoRekall version: MemoRekall-IIIF
 - i. Exploitability timeline: after project

4. **Design "cooperation analytics" to measure the intensity of collaboration** between researchers and socio-economic actors in VERA. Those analytics will be useful to the project teams themselves, but they will also be a major contribution to funders, policymakers, research organizations and other stakeholders supporting citizen science policies.
 - a. Relevant KER: Cooperation Analytics code
 - i. Exploitability timeline: after project

5. **Experimenting new methodologies through pilots** in order to increase the involvement in SSH Citizen Science projects and favoring social empowerment.
 - a. Relevant KER: Caring Community Toolkit
 - i. Exploitability timeline: after project

Horizon Results Booster Services (part 2)

In the final year of the project (2023), COESO received services through the Horizon Results Booster (HRB) **PDEC-C program**, which assists projects to improve their exploitation strategy, as well as the HRB **Business Plan Development module** (for the VERA platform). For the PDEC-C module, two Key Exploitable Results (KERs) were focused on - the VERA platform and funding advocacy. This process provided practice and insight into reconsidering the KERs we had previously determined, and choosing a total of six key exploitable project results: 1) VERA, 2) MLEs for participatory research with SSH, 3) funding advocacy strategy, 4) Open Call guidelines, 5) Cooperation Analytics code 6) “Exploring Citizen Science” Podcast. Additionally, two of the pilots have produced KERs: 1) MemoRekall (pilot 2: Dancing Philosophy), 2) Caring Community Toolkit (pilot 7: Aging in a Caring Community). All eight of these KERs, and the plan for their exploitation, are described in the next section.

Key Exploitable Results (KERs) and Strategies

The list of exploitable assets was refined throughout the project duration through dedicated discussions with the concerned consortium members about the relevance and usability of the results, and taking into consideration the relevant IPRs and level of interest of the different project partners. Although the list below focuses mainly on the KERs pertaining to the overall COESO project, some of the pilots have also developed their own KERs: providing support to identify and create KER plans has been then identified as a possible service component to be added to the VERA service.

KER #1: VERA (Virtual Ecosystem for Research Activation)

The VERA platform is a website, fully developed within the COESO project, that is intended to support participatory research and citizen science in the social sciences and humanities by providing a virtual space for various project stakeholders to find each other, to find useful collaboration tools for building their projects together, and to provide a convenient search function for finding relevant funding calls for projects.

Exploitation strategy: The VERA platform is conceived as an integral part of a comprehensive service, to be offered by the OPERAS Research infrastructure, that includes community engagement activities to support citizen science in the social sciences and humanities. OPERAS is the European Research Infrastructure supporting open scholarly communication in the social sciences and humanities. The OPERAS Research Infrastructure already has a spread of existing services and a plan for future services, as it moves towards reaching its medium to long term

goal of establishing the infrastructure as an European Research Infrastructure Consortium (ERIC). The VERA website itself is a critical technical tool, as it will be perceived as the “face” of the entire VERA service for OPERAS. Its sustainability requires continuous maintenance and development that will be flexible to respond to the community’s needs. Therefore, a business plan was drafted – together with OPERAS, Net7 (the website developer), and Max Weber Foundation (communication partner for OPERAS) – with diverse scenarios for the future platform sustainability. The business plan for the VERA platform also takes into account the sustainability of the APIs and/or plugins allowing the connection and interoperability with other platforms and services (i.e. Hypotheses.org, EU-Citizen.Science, GoTriple platform, funding databases and other potential external databases).

Organizations that expressed interested in taking exploitation action: OPERAS, Net7, MWS

KER #2: Mutual learning exercises (MLEs) for participatory research with the SSH

Several different formats of Mutual Learning Exercises (MLEs) were explored within the COESO project, where diverse stakeholders from multiple projects were brought together, in-person and on-line, to learn from each other. These MLE formats were successful in facilitating knowledge exchange and are reusable in other contexts.

Exploitation strategy: The COESO MLEs are summarized and openly published on Zenodo in [Public Engagement, Mutual Learning, and Multimodal Practices in Citizen Science: report on the activities of WP6 \(COESO D6.1\)](#). The methodologies used to facilitate the exchange of information can be applied to other topics and with other groups of learners. OPERAS is exploring offering the facilitation of MLEs, using the framework developed within COESO, with other SSH citizen science projects, as one possible service to sustain and feed into the VERA platform.

Organizations that expressed interested in taking exploitation action: OPERAS, EHESS

KER #3: Funding Advocacy

COESO’s funding advocacy work was multifaceted, but at its core was the facilitation of workshops for funders, designed to promote knowledge sharing on best practices for funding citizen science in the social sciences and humanities. The funding advocacy KER refers to a service that includes the organization of more funder workshops, utilizing and expanding upon the workshop format that was developed and used within the COESO project. It includes a list of funders interested in collaboratively shaping new schemes to support participatory research in the SSH.

Exploitation strategy: Several COESO consortium partners have expressed interest in continuing the funding advocacy work together, either through a dedicated project or as part of a larger project. They have already applied for funding together one time, without success, but they are continuing to look for other opportunities.

Organizations that expressed interested in taking exploitation action: OPERAS, Ibercivis, Max Weber Stiftung, EHESS

KER #4: Open Call Guidelines

COESO's second set of pilot projects were funded through a "cascade funding scheme," whereby COESO re-assigned a designated portion of its Horizon 2020 funding to specific citizen science projects. This was accomplished through an Open Call for applications, with an Open Call Guidelines outlining all of the rules and procedures for the open call process. Designing the guidelines involved legal counsel as well as input and feedback from all the consortium partners, which is therefore a valuable resource for anyone who is designing an open call for funding.

Exploitation strategy: The Open Call Guidelines, [Open Call Guide for Applicants](#) (COESO D2.1), are available on Zenodo with an open access license for anyone to download.

Organizations that expressed interested in taking exploitation action: OPERAS

KER #5: Cooperation Analytics

COESO developed the concept and technical code for a potential tool called "Cooperation Analytics", which can be used to analyze and self-assess the cooperation aspect of collaborative project members. Through natural language processing, the tool uses a set of 23 indicators to analyze texts it is given. The code is available at https://github.com/yuma-ando/COESO_Cooperation_Analytics.

Organizations that expressed interested in taking exploitation action: none within the COESO consortium

KER #6: "Exploring Citizen Science" podcast series

Nine episodes of the "[Exploring Citizen Science](#)" podcast series were created and published within the framework of COESO, and their focus is on the overall project and the COESO pilots.

Exploitation strategy: In the [last episode](#), the narrator, who is the Chief Operating Officer of BulleMedia invites the European citizen science community to get in touch with him (alexander.ricci@bullemedia.eu) to "discuss the conditions for the potential productions of new episodes about citizen science", which could be published on the same podcast feed to benefit from an established audience and visibility.

Organizations that expressed interested in taking exploitation action: BulleMedia

KERs from pilots

Specific KERs developed by pilots were not initially envisioned. This shows how a support framework for participatory research with the SSH can enhance the development of exploitable results in this field.

Prototype for a new MemoRekall version: MemoRekall-IIIF (Pilot 2)

During the COESO project, MemoRekall - a free and open-source web app to explain and annotate videos through adding notes, documents and web links - was further developed and

improved. The resulting prototype for MemoRekall-IIF is currently available in GitLab: <https://gitlab.tetras-libre.fr/iiif/coeso-deliverable>.

Exploitation strategy: The Rennes 2 University will make the prototype publicly available on the MemoRekall website.

Organizations interested in taking exploitation action: Rennes 2 University

Caring Community Toolkit (Pilot 7)

Through the project's collaborative work between a researcher in anthropology with the staff and residents of a retirement home, they created the [Caring Community Toolkit](#), available in English, Italian, Spanish, Catalan and French that can be used by researchers and professionals dealing with social intervention, policymakers, service providers, and municipalities to promote the creation of caring communities where social inclusion of older people is given special consideration. It provides diagnostic and intervention techniques, based on the specific experience of the AGORAge project.

Exploitation strategy: Currently, the focus is on wide dissemination of the toolkit to influence policy making and best practices in communities across Europe.

Organizations interested in taking exploitation actions: ISRAA (Istituto per Servizi di Ricovero e Assistenza agli Anziani)

IPR management

The Consortium Agreement (CA) was signed by each Beneficiary prior to the project start, and is based on the DESCA model for Horizon 2020⁸. The CA provides regulations for issues related to IP Ownership, Confidential Information, Open Source issues, Standard contributions, and Access Rights to Background and Results within the project.

Apart from this general agreement, two research datasets produced during the project were expected to produce innovative ways for addressing IP management:

- The first was through a collaboration between a research unit and a dance association, involving artistic production and exploitation. In this case, conversations were started but, due to resource constraints, the discussions stopped at the concept level. A grant application was created and submitted, but it has not been funded. Three COESO project partners were involved: EHES, Cadmium compagnie, Babel International.
- The second collaboration (within Pilot 4) was between a private research company and an investigative journalism association, where high security databases asking for Non Disclosure Agreements (NDA) between partners will be used. In this case, the reports related to the pilot project allowed to consolidate exploratory discussions on the matter and the two main pilot partners are now continuing to work on another project to create

⁸ See <https://www.desca-agreement.eu/what-is-desca/>

a concrete framework structure.

During the project lifespan, the IPR established in the grant agreement was sufficient and did not need to be updated.

V. Conclusion

Overall, the process of creating this document, including the impetus created by submitting the first version early on in the project (month 6) helped the team to keep a birds-eye view of the project – that is, to keep the overall project objectives in mind, even while dealing with the seemingly more pressing details of the individual projects tasks.

By regularly reviewing the KERs, the consortium partners maintained an ongoing meta-level discussion, which ensured that we could collaboratively steer the project in the right direction. Our participation in the Horizon Booster Results PDEC-C module and the business development module was especially beneficial to help us to provide key discussion points and shared definitions for the group decision making process regarding the project's exploitable results and, ultimately, to better ensure the sustainability of the results the project set out to create and ensure a more positive impact for the communities it aimed to serve and for society at large.