

RI-VIS Communication Standards Toolkit

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Executive Summary

To become sustainable over time, European research infrastructures must increase their visibility, both individually and collectively. This requires the harmonization of the strategies, tools, guidelines and resources that European research infrastructures use in their communication. This toolkit is a collective effort of 31 communication experts representing 17 research infrastructures to provide an easy and useful set of communication tools, guidelines and resources adapted to the needs, constraints and capacities of European research infrastructures. The “Communication Toolkit for European Research Infrastructures” includes:

- A style guide, comprised of a glossary, a jargon buster and key messages;
- A website, including guidelines for navigation and the “about us” page, along with contents for a “about EU research infrastructures” webpage
- A social media strategy and common hashtags
- Resources, including general PowerPoint slides and strategies to address different targets (private sector, decision-makers and research infrastructures outside of Europe).

Detailed report on the deliverable

Background/Introduction

Internationalization is a key ingredient for the long-term sustainability of research infrastructures. Improving cooperation with strategic partners and stakeholders is a main measure to tackle the challenges posed by the need to better structure the international dimension of research infrastructures. Hence, to become sustainable over time, European research infrastructures must increase their visibility, both individually and collectively.

To increase the visibility of European infrastructures – to multiple stakeholders in Europe and beyond - their communication must become more effective and consistent. This requires the harmonization of the strategies, tools, guidelines and resources that European research infrastructures use in their communication, thus contributing to consolidate the very concept of “research infrastructures” and improve how different stakeholders perceive them. European research infrastructures must start “speaking the same language” and effectively engage with

different sectors, thus increasing their collective visibility and consolidating their presence in the scientific research realm.

Description of work

This toolkit is a collective effort of 31 communication experts representing 17 research infrastructures to provide an easy and useful set of communication tools, guidelines and resources adapted to the needs, constraints and capacities of European research infrastructures.

To develop the toolkit, we gathered communication experts in three workshops at months 5 (in Faro, Portugal), 8 (Paris, France) and 12 (Munich, Germany). Before the first workshop, we asked all RI-VIS partners to conduct brainstorming sessions within their teams to perform a collective SWOT+PESTLE analysis. All contributions to this analysis were discussed during the first workshop, which included the presence of 12 communication experts. During this workshop, we identified major needs, constraints and views of communication experts from different research infrastructures. We discussed a plan for the sustainability of the toolkit, in which a future articulation with ERIC-Forum was identified as an opportunity to ensure that the toolkit would (1) be used by more research infrastructures and (2) be used after the end of RI-VIS.

Between workshops 1 and 2, we engaged with ERIC-Forum and together we studied the possibility of integrating the RI-VIS toolkit in a future web platform that ERIC-Forum was developing for research infrastructures. We also articulated with RI-VIS WP 4 to assess the possibility of transposing this toolkit into an online format, which would add visibility and make it more user-friendly. In workshop 2, we gathered 24 communication experts from research infrastructures of projects RI-VIS and/or ERIC-Forum. We collected input from these experts to develop the contents outlined in the toolkit structure and we also discussed the features we should include in a future web platform for this toolkit to be developed in ARIA by WP4 lead member Instruct-ERIC.

Between workshops 2 and 3, the CCMAR team structured the toolkit's contents based on the input gathered before, on general communication best-practices and on available communication models (namely the social media strategy model developed by CCMAR). In the third and final workshop, the toolkit's contents were finalized and validated. The toolkit included:

- A style guide, comprised of a glossary, a jargon buster and key messages;
- A website, including guidelines for navigation and the “about us” page, along with contents for a “about EU research infrastructures” webpage;
- A social media strategy and common hashtags;
- Resources, including general presentation slides and strategies to address different targets (private sector, decision-makers and research infrastructures outside of Europe).

Conclusion/Next steps

The development of the Communication Toolkit for Research Infrastructures (attached doc) enabled the development of a community of practice made of communication experts that work in the communication of research infrastructures all over Europe. To be able to share views, experiences, constraints and advances to peers is key to improve the success of our work, hence the practitioners that form this community have demonstrated interest in continuing working together and supporting each other.

In view of supporting this community of communication experts, and also ensuring the use and dissemination of this toolkit, we will transpose the contents of the toolkit into a web platform developed in ARIA by RI-VIS partners Instruct-ERIC. This platform will convey all the toolkit's contents in a more user-friendly format and include features that enable users to share resources and experiences. In addition, it will enable users to leave comments to the toolkit that may be later used to updated and/or improve it.

We will also work closely with the ERIC-Forum team to ensure that this platform may eventually be integrated in a future platform that this project is developing with the objective of providing easy access to useful tools and resources to research infrastructures. This articulation is considered essential to ensure the sustainability of this deliverable.

While this web platform is not completed, we will work towards raising awareness of this new toolkit available for research infrastructures by promoting or participating in events where RI managers and communication officers are present.

Appendices

Appendix 1: Communication Toolkit for European Research Infrastructures



COMMUNICATION TOOLKIT
FOR EUROPEAN RESEARCH INFRASTRUCTURES

Communication Toolkit for European Research Infrastructures

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About this Communication Toolkit

WHAT?

This toolkit provides an easy and useful set of tools, guidelines and resources that European research infrastructures may integrate into their communication strategy and activities. Focused on communication basic pillars (target audience, goals, messages, channels), this toolkit challenges us to rethink and improve how we communicate our research infrastructures.

WHY?

The common use of this toolkit is expected to help harmonize the communications of research infrastructures in Europe, thus contributing to consolidate the very concept of “research infrastructures”, improve how different stakeholders perceive them and increase their visibility.

WHO?

This toolkit is meant to be used by any professional dealing with the communication activities of individual research infrastructures, regardless of their type (distributed, centralized, virtual) or research field.

HOW?

You can apply or adapt the contents of this toolkit into the communication activities of your research infrastructure. Or not – they may not apply to your infrastructure. The goal is to align key messages with other research infrastructures, while improving the effectiveness of your communication activities and strategies.

1. Style Guide

Individual research infrastructures should have their own branding style guide, ensuring consistency throughout their design and writing materials. By incorporating a few features that are common to most research infrastructures – such as the use of word and icons, key messages and shared concepts – we will be able to promote consistency amongst research infrastructures and produce consistent and recognizable outputs.

1.1. Glossary



Research Infrastructure

A research infrastructure is an organization that enables the research community to use specific facilities, resources and services in order to accelerate scientific achievements and promote sustainable research.

Guidelines

- ✓ **Use this term when presenting your research infrastructure.** Why? Because this is a new term that must become recognizable by its stakeholders, and for this to happen it must be used frequently and consistently.
- ✓ **Do not use the acronym “RI” in your communications,** as it is not familiar to most of your stakeholders.
- ✓ **Explain the meaning of the term “research infrastructure” when your audience is not familiar with it.** A good starting point is to use your research infrastructure as an example (e.g.: we enable the research community to use [...specify...]). See “1.3 – Key Messages” for additional resources to explain what research infrastructures are.



Types of Research Infrastructures



Distributed research infrastructures

A distributed research infrastructure is an organization that enables the research community to use specific facilities, resources and services that are geographically scattered.



Single-sited research infrastructures

A single-sited research infrastructure is an organization that enables the research community to use specific facilities, services and resources that are geographically localized in a single site (or a few complementary sites), even though its governance may include several countries.



Virtual infrastructure

A virtual infrastructure is an organization that works as an e-infrastructure, providing electronic services, networks, archives, databases and databanks.



What about 'e-infrastructures'?

The term 'e-infrastructure' may generate confusion when used in the context of research infrastructures, as it repeats the word 'infrastructure'. It is advisable to make it clear in your communications if 'e-infrastructure' refers to an organization or to a type of service provided by the organization:

'E-infrastructure' – use it in the context of purely virtual infrastructures (those that do not have a geographic location or distribution).

'Data & Computational Services' – use it to describe the set of electronic services, networks, archives, databases and databanks that your research infrastructure provides access to, along with other type of services and resources.



Access

'Access' refers to the process by which a research infrastructure enables the research community to use specific facilities, resources and services.

Guidelines

- ✓ **Do not substitute the term 'access' with a similar one** when referring to its specific meaning in the context of research infrastructures. 'Access' is already widely used by research infrastructures, so substituting it will only generate more confusion.
- ✓ **Do not focus your communication on the process (access)**, instead focus on the final products (the facilities, resources and services), which are what your audience is looking for.
- ✓ **Beware that 'to access' is a verb and "access [to]" is a noun**, meaning that:
 - When used alone, 'access' is likely to be interpreted by your audience as a call-to-action;
 - When referring to 'enabling the use of [something]', use 'access to' [something].
- ✓ **Avoid confusing your audience by repeating the word 'access'** in your communications, especially if you are using it with different meanings.
- ✓ **Avoid the expression 'access to research infrastructures'**, as this is equivalent to repeating the word access (e.g.: access to a research infrastructure, which in turn is an organization that provides access to facilities, resources and services).

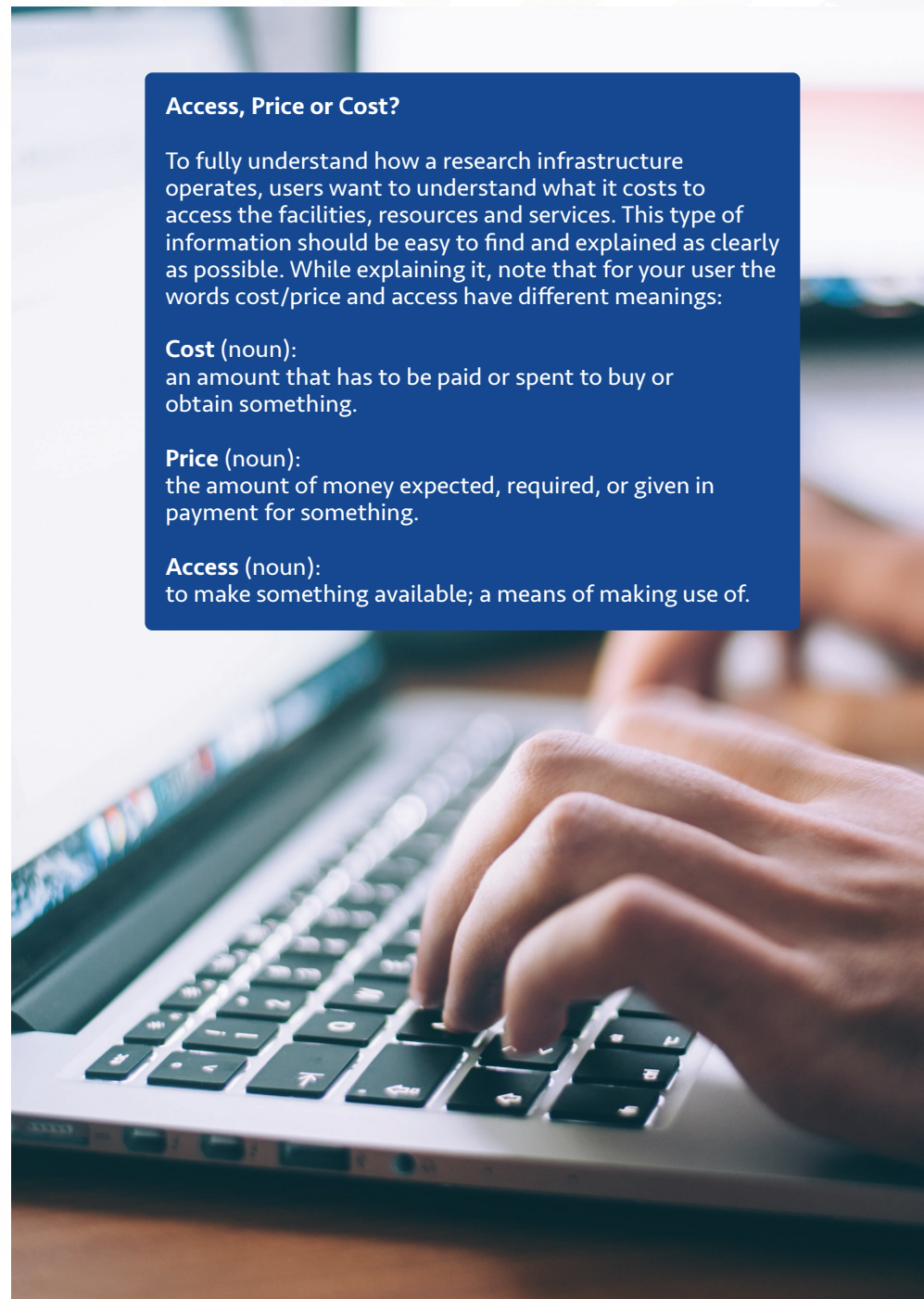
Access, Price or Cost?

To fully understand how a research infrastructure operates, users want to understand what it costs to access the facilities, resources and services. This type of information should be easy to find and explained as clearly as possible. While explaining it, note that for your user the words cost/price and access have different meanings:

Cost (noun):
an amount that has to be paid or spent to buy or obtain something.

Price (noun):
the amount of money expected, required, or given in payment for something.

Access (noun):
to make something available; a means of making use of.



1.2. Jargon Buster

Acronyms

Avoid using acronyms in your communications, especially those that are specific to research infrastructures such as RI.

Spell it out.

Although it may be useful to communicate your research infrastructure using its acronym, make sure that its full name is always visible (it is harder to remember an acronym when we do not know what it stands for).



The 'universe' or research infrastructures

There are plenty of terms that are specific to the context of research infrastructures (e.g.: ERIC, ESFRI) and European Commission activities (e.g. EOSC, CORDIS) but are not familiar to most users (even researchers), therefore:

How to use them?

If you need to convey these terms, always spell them out and explain what they mean (unless your audience works in research infrastructures or in the European Commission).

When to use them?

When communicating what your research infrastructure is and what it offers, avoid mentioning these terms as they will add a layer of complexity to your message. Use these terms in context, when they are specifically related to the message you are conveying (e.g.: use ERIC in the context of explaining the legal status of a Research Infrastructure).

Your organization

The organization of most research infrastructures is often quite complex. It also differs substantially between research infrastructures, and so does the terminology involved to describe it (e.g.: national hub, national node, member country).

Because there is so much diversity among research infrastructures, it is not possible to standardize these terms, so users will not become familiar with them from interacting with different research infrastructures over time (on the contrary, it may even confuse users more).

Focus - Put your main focus on what the research infrastructure does, instead of how it is organized.

When to convey your organization?

Do it when you actually need to explain how your research infrastructure operates (e.g.: in your website, explain your organization in a webpage under your "About" menu).

How to convey your organization?

Always explain what the terminology means in the context of your research infrastructure (a glossary is a good approach) and, ideally, use simplified infographics to convey your organization. If possible, try to portray the reality of your research infrastructure in your graphics (e.g.: one central hub/node + national nodes) as this will also convey the true dimension of your organization.

1.3. Key Messages

Different approaches to convey what research infrastructures are, depending on your audience and/or type of activity.

Common Concepts #1

Research Infrastructures are important for...

FOSTERING COLLABORATION

Scientists achieve better results when they join forces and work together. By connecting scientific communities, research infrastructures foster collaboration between researchers from different economic sectors (academia, business, and government), different fields of expertise, different institutions, and even different countries.

PROVIDING OPPORTUNITIES

Because research infrastructures make high-quality facilities, resources, and services available to everyone, science is driven by excellence and not by the limited research capacity of different countries, economic sectors, or institutions.

PROMOTING SUSTAINABILITY

Research infrastructures contribute to creating a sustainable research environment and avoid unnecessary duplication of effort by pooling research data, resources, facilities, and equipment.

SHARING KNOWLEDGE & RESOURCES

Research infrastructures help organise a fair and transparent system to share knowledge and cutting-edge resources among multiple countries and institutions, each with its own rules, culture, and language.

CROSSING BORDERS

Research infrastructures promote high-quality top-level research across disciplines, economic sectors, and countries.

WHEN?

Incorporate these concepts into your message when:

- conveying the rationale behind research infrastructures;
- promoting European research infrastructures (individually or as a whole);

WHO?

General public, researchers, industry, media, policy makers
research infrastructure counterparts (outside of Europe)



Common Concepts #2

WHEN?

Incorporate these concepts into your message when:

- conveying the rationale behind research infrastructures;
- promoting European Research Infrastructures (individually or as a whole);

WHO?

General public, researchers, industry, research infrastructure counterparts (outside of Europe)

European Research Infrastructures...

MAKE SCIENCE HAPPEN

The combined effort that supports European research infrastructures promotes the pooling of the resources, knowledge, and expertise needed to fast-track scientific achievements.

PROMOTE INNOVATION

New ideas, scientific breakthroughs, and discoveries are the goals of European research infrastructures, which aim to solve bottlenecks, push-back the frontiers of disciplines, and enable rapid technological development.

TACKLE SOCIETAL CHALLENGES

European research infrastructures focus on responding to global societal challenges.

DELIVER BIG RESULTS

By managing the combined competencies of specific research fields, European research infrastructures are delivering big results that improve people's lives.



Analogy

SCIENTISTS ARE LIKE MUSICIANS.

Each has the expertise to play an **instrument** (lab, tool), but they do so in separate **practice rooms** (facilities).

The **conductor** (research infrastructure/ European research infrastructures) brings the musicians together to form an **orchestra** (scientific community) and trains them so that they can perform a **masterpiece** (scientific output), that has been approved by the **artistic director** (scientific committee).

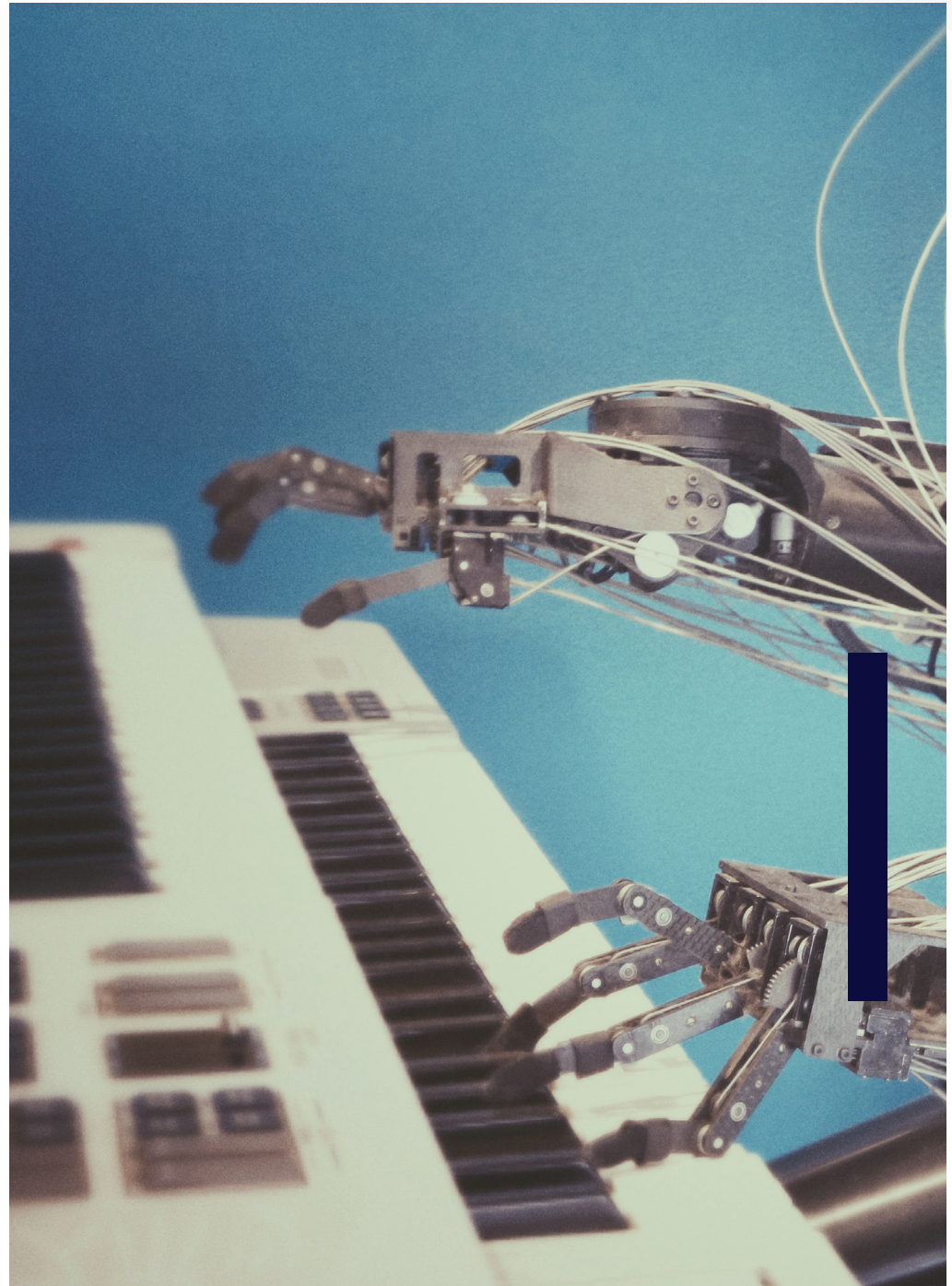
The orchestra then performs to the **public** (society), who can benefit from the work of both the conductor and the musicians.

WHEN?

Informal activities

WHO?

Kids, juvenile audiences and general public



Storytelling

Science is at the heart of the societal and economic development of the European Union - a diverse group of countries at different stages of scientific development with different resources, rules, cultures, and languages.

This diversity is embraced by the European Union, which devises common strategies to promote innovation and make science happen. One such strategy is the development of European research infrastructures, which are organizations that foster collaboration between scientists from different countries, economic sectors, research fields, and institutions. With this collaboration, scientists are able to work together to deliver big results that improve people's lives and tackle the challenges of society.

Research infrastructures are an elegant solution to make science more effective and sustainable in the complex European backdrop of interactions among nation states. They enable an organized, fair and transparent system to share knowledge and resources, and in doing so, they contribute to the pooling of data, facilities and equipment, thereby avoiding unnecessary duplication of effort.

By making high-quality facilities, resources and services available to everyone, research infrastructures ensure that science is driven by excellence and not by the research capacity of individual countries, economic sectors, or institutions. They also ensure that this excellence is aimed at solving bottlenecks, pushing forward the frontiers of scientific disciplines, and enabling transformative technological development.

With the goal of elevating science across the globe, European research infrastructures include members and partners from other countries and regions and span different research fields, including Biological and Medical Sciences, Material Sciences, Social Sciences and Humanities, Environmental Sciences, Energy and Astronomy.

WHEN?

Formal and informal activities

WHO?

General public, researchers, industry, policy makers, research infrastructure counterparts (outside of Europe)

2. Website

The website of a research infrastructure is a key communication tool. It is where you present your research infrastructure to the public and to your users – what it does, why it is important, who is behind it, how can your users engage with it. Here is some good advice to develop a great research infrastructure website.

2.1. Navigation

A good rule-of-thumb when designing your website is to envisage that it will be visited by your different types of target audiences (e.g.: researchers, industry, policy-makers, etc), but also by website visitors at different stages of interaction with your research infrastructure. This means that you should develop your navigation and contents considering:

1. People who don't yet know your research infrastructure (or even any research infrastructure whatsoever)

"About us"

Have your "About us" webpage easy to find and including clear contents about your research infrastructure. See more guidelines on how to develop an "About us" page in section 2. 2.

"About European research infrastructures"

Include a webpage about European research infrastructures, as this will provide a broader view of the context and importance of creating research infrastructures such as yours (see section 2.3. with possible contents).

2. People who are somewhat familiar with your research infrastructure

What you provide

Create an easy pathway for website visitors who already know what your research infrastructure is all about, but will be looking for the specific facilities, services and/or resources you provide access to.

3. People who know exactly what they want from your research infrastructure

How to engage

Create links that facilitate visitor engagement with the research infrastructure, such as "how to engage", "contact us" or "access our services".

4. People who have clear and defined interests (your target groups)

Targeted communication

Create links and specific contents that are appeals your key audiences (e.g.: a "Business" or "Industry" menu/submenu if you are targeting the private sector, a webpage with your main achievements/outputs if you are targeting decision makers).

2.2. About us

The “About us” webpage is where users who are not familiar with your research infrastructure go to discover what it is all “about”. It should be easy to find within your main menus.

Style

Keep it short and simple, with your key messages upfront.

Spell out your acronym.

Avoid using acronyms and jargon (see jargon buster in section 1.1. Glossary).

Sub-divide the contents with subtitles and short texts.

Added value

For distributed research infrastructures - including a map of your partner sites/members will give a geographic feeling to your message.

Reinforce your message with images related to the facilities, services and/or resources your research infrastructure enables.

Provide a link to your brochure (if applicable).

Content

Establish confidence - briefly explain what is it that your research infrastructure provides, why it is unique. Note that this explanation should be understandable by visitors who work in different fields/sectors.

Clarify that “us” refers to a research infrastructure (see definition in section 1.1 Glossary).

Communicate value - why is your research infrastructure important? Highlight the value of what your research infrastructure does, the solutions it brings.

Create pathways - do not overload your “about us” page with tonnes of information that may confuse your visitor. Instead, provide links to other pages in your website where visitors may find more useful information. Ideally, try to introduce these links in a sequence that makes sense to your visitor.



2.3. About European research infrastructures

Below you will find three blocks of text that you can use to create a webpage about EU research infrastructures in your website. In the last paragraph, make sure that you link “European Commission” and “ESFRI” to their websites.

MAKING SCIENCE HAPPEN

To put science at the heart of societal and economic development, we need to devise strategies to push the limits of science in order to promote innovation, tackle societal challenges and deliver big results.

In Europe, one such strategy is the development of **research infrastructures** - organizations that enable the research community to use specific facilities, resources and services, thus fostering collaboration between scientists from different countries, economic sectors, research fields, and institutions.

WHY DO WE NEED EUROPEAN RESEARCH INFRASTRUCTURES?

Research infrastructures are an elegant solution to make science more effective and sustainable in the complex European backdrop of interactions among nation states.

They enable an organized, fair and transparent system to share knowledge and resources, and in doing so, they contribute to the pooling of data, facilities and equipment, thereby avoiding unnecessary duplication of effort.

By making high-quality facilities, resources and services available to everyone, research infrastructures ensure that science is driven by excellence and not by the research capacity of individual countries, economic sectors, or institutions. They also ensure that this excellence is aimed at solving bottlenecks, pushing forward the frontiers of scientific disciplines, and enabling transformative technological development.

CROSSING BORDERS

With the goal of elevating science across the globe, European research infrastructures include members and partners from other countries and regions and span over different research fields, including Biological and Medical Sciences, Material Sciences, Social Sciences and Humanities, Environmental Sciences, Energy and Astronomy.

They are strongly supported by the European Commission, which has set up the European Strategy Forum on Research Infrastructures (ESFRI), a strategic instrument to steer policy-making and facilitate the better use and development of research infrastructures.



3. Social Media

Social media platforms have changed the way we communicate today. For research infrastructures, these platforms can be a great way to reach out to potential users and to engage them into different activities.

To improve and create common standards for European Research Infrastructures, we present (1) a model to create a **social media strategy** adapted to their needs and constraints and a (2) list of **common hashtags** that all research infrastructures could use collectively to boost their online visibility.

3.1. Social Media Strategy

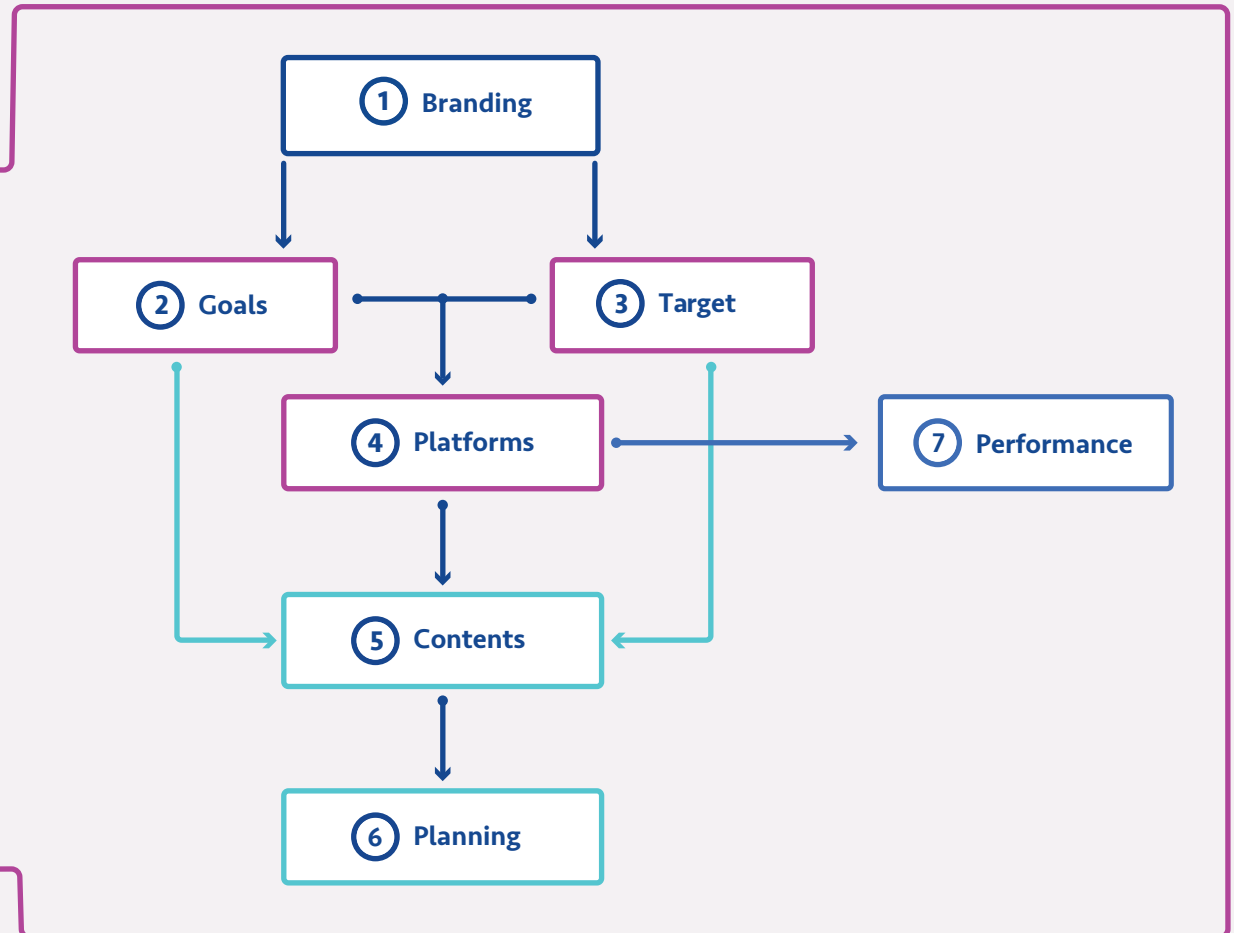
Your social media strategy should be perfectly aligned with (and integrated into) the overall communication strategy of your research infrastructure. This 7-phase model will help you develop your social media strategy and challenge you to elevate the quality and balance of your posts.

First you need to define your **“branding”**, by specifying how you want to position your research infrastructure, what are your main key messages, what is your “pitch”.

Then you need to set the basis: the **goals** you aim to achieve and the **targets** you aim to engage using social media platforms.

Once you define this, you will be prepared to choose the most appropriate social media **platforms** for your research infrastructure.

Considering all the previous phases, you can move on to defining your **content** strategy and **planning**. Finally, you should measure your **performance**, which will help you to improve and adjust the previous phases and achieve an effective communication.



1

BRANDING

HOW TO POSITION YOUR RESEARCH INFRASTRUCTURE?

Guidelines:

- ✓ **Spell out the name** of your research infrastructure
- ✓ **Include your logo and a descriptive image** of your research field
- ✓ **Convey your key messages** using an “elevator pitch” approach, that is, explaining what makes you unique in a (very) short compelling story
- ✓ **Do mention that you are a research infrastructure** (do not use the RI acronym, though)



2

GOALS

WHAT DO YOU WANT TO ACHIEVE THROUGH SOCIAL MEDIA?

Your goals should determine your strategy. Clearly **define specific and measurable goals** that you may achieve through social media.

Frequent goals of research infrastructures:

(highly recommended):

- Increase the visibility of your research infrastructure
- Promote your events, services, job opportunities and calls
- Generate traffic to your website
- Promote your services and projects
- Increase your networking: partners and prospective users
- Increase user engagement (establish dialogue)
- Promote the results and outputs of the access to facilities, services or resources that you provide

(also recommended):

- Promote events, job opportunities and calls from your partners (e.g.: other research infrastructures, partners in projects and clusters)
- Promote your own nodes/hubs
- Increase the visibility of your nodes/hubs
- Create outreach campaigns
- Promote your funding institutions

3

TARGETS

WHO DO YOU WANT TO REACH?

Step 1:

Identify your target audiences.

Suggestions:

Common targets include people and entities from:

- Research (from fields directly related to your research infrastructure and from other fields / from academia or from the private sector)
- Private sector – business and industry
- Other European Research Infrastructures
- Research infrastructures counterparts outside of Europe
- Decision-makers
- Funding institutions
- Pan-European clusters, projects and initiatives
- Younger generations
- General public
- Internal research infrastructure community

Step 2:

If possible, define who your target audiences are, including:

- Demographic group
- Affinities (interests, preferences, etc)
- Economic sector or occupation
- Nationality (e.g.: from your member countries, other EU countries or countries outside the EU zone)

Step 3:

Match your communication goals with each of the targets you defined

4

PLATFORMS

WHICH ONES SHOULD YOU USE?

Identify the social media platforms that are most appropriate to reach your different target audiences and achieve your defined goals, considering:

1. Who are the users of each platform, and what do they use this platform for?
2. How many people use specific social media platforms (penetration rate) in each country/region you want to reach?
3. What is your own capacity to allocate to social media (resources, contents, etc)?

5

CONTENT

WHAT TYPE OF CONTENT WILL INTEREST YOUR USERS (USER VALUE)?

Step 1:

Define the type of content that is most suitable to achieve the goals you have set for your target audiences.

Aim high!

Include not just the contents that you can easily produce, but also content that may be out of your reach for the time being. You'll need to be more realistic when it comes to planning (next stage), but for now you can have an optimal "wish-list" of types of contents that you may revisit when the opportunity comes. Some examples below:

The obvious: if goals include "promoting your events" and "increase your networking" for several target audiences, then content about your events that tags those who participated is quite straightforward.

The standard: if goal is "to promote your services" and "increase your networking" and target is "researchers", a possible type of content would be a "user testimony" (i.e., a researcher talking about a service that you provided access to, tagging all entities/people involved).

The demanding: if goal is to "promote your results and outputs" and targets are "researchers" and "decision makers", a possible type of content would be a short story about some achievement you enabled, highlighting your part in it.

The unexpected: If goals include "increase the visibility of your research infrastructure" and "create outreach campaigns", and the "general public" is a target audience, just find an angle from which you stand out and think of content that is outside-the-box (e.g.: #ICOScapes Photo Campaign).

The challenging: if goals include "establish dialogue", why not challenge your target audience with a question that they may find relevant?

The borrowed: if you have a specific target that follows other social media platforms, you may "borrow" some attention from this target by commenting on relevant information in posts that somehow relates to your research infrastructure.

Step 2:

Find creative and appealing ways to produce the content.

Suggestions:

Invest on visuals. Content is not just about text, it is also about photos, illustrations, videos, podcasts, etc.

Storytelling. "Stories" gather more attention and are more easily remembered than just plain informative text. Try to use this technique whenever possible.

Focus on people and real situations. Content is more interesting when we can relate to it.

Step 3:

Create your own guidelines to produce each piece of content you have defined, including:

- **Information** you need to develop text/storytelling.
- **Type** of visuals you need to illustrate the content
- **Who** or what should be tagged.
- **Which hashtags** to use (if applicable).
- **Add links** to relevant websites.
- Any other considerations you find relevant to **ensure that the content is effective.**

HOW WILL YOU EXECUTE?

By now, you should have a clear idea of what you want to communicate and to whom, the platforms you should use and the type of contents you should be developing. **So now is the time to plan how all this can come together.**

There are several questions you must consider while planning:

BUDGET

How much money do you have for social media communication? This is especially important if you want to develop relevant and visually appealing content or outreach campaigns.

Is it possible to use the content/resources you develop for social media for your other communication activities such as website and print (and vice-versa)? Note that it is always a good idea to develop an integrated communication (where all your communication formats and messages are carefully linked together).

HUMAN RESOURCES

How many people in your team can be engaged in social media communication? And for what amount of time?

Will you need to train them? You should consider that human resources come and go, so having your strategy outlined in a way that you can easily convey it to someone new is an advantage.

PARTNER COLLABORATION

You must engage your nodes/hubs in the production and sharing of contents. How can this be done? This is especially important for distributed research infrastructures, as this type of collaboration may help enhance content quality and increase visibility.

Will you need to train or guide them? You should consider that your partners will be more willing to collaborate if they receive clear and simple guidelines that are “manageable” (given their own resources) and adapted to their context.

“JUICE”

How will you ensure a regular input of relevant and updated info for your contents (e.g.: new research outputs, prizes and awards, info about services and facilities, etc.)?

Note that this question is key to ensure an adequate balance and quality of content, in which your social media conveys several types of content that serve different goals and collectively reinforce your branding.

RISK MANAGEMENT

How will you deal with misinformation or controversy? How will you reply to comments while maintaining the views of your research infrastructure? What type of content should you be retweeting/reposting, and which types you should definitely avoid? Does your research infrastructure have an internal communication policy with which your social media strategy should align?

7

PERFORMANCE

HOW TO MEASURE YOUR EFFECTIVENESS?

Social media metrics can provide useful information that enables you to measure how effective your social media strategy is: what works, what doesn't.

Remember that your social media strategy is a work-in-progress: there is always room for improvement, and you can add or remove types of content at any time.

There are plenty of tools and guidelines available online that you can easily adapt to measure the effectiveness of your social media. It mostly depends on how much effort you can put into this task.

Guidelines:

Whether you make a more superficial or a more in-depth analysis, try to follow these two rules-of-thumb:

- ✓ **Goal oriented** - Find specific metrics that match the goals and targets you initially defined (you may be performing great overall, and still completely miss a goal or a target audience).
- ✓ **Big picture Vs individual posts** - Pay attention to the "big picture" (your overall metrics) but also to how particular posts are performing, considering the goals/targets they are aiming at.



3.3. Common Hashtags

Hashtags enable you to index keywords that will facilitate good search results for your research infrastructure. They are a great way to increase awareness and engagement, to generate interest on your activities and, most importantly, to help your target audience find your research infrastructure.

When hashtags are used by a lot of different users, they begin to trend. Therefore, it is important that all European research infrastructures are consistent in their use of hashtags. This section proposes hashtags for common use in different types of posts/tweets.



FOR GENERAL USE:

#EU_RIs
#ResearchInfrastructure

TO COMMUNICATE YOUR EVENTS:

#ResearchInfrastructuresEvents

ESFRI offers to publicize events related to research infrastructures in Europe and globally in its website. Those events will be traced on twitter using the above hashtag.

TO COMMUNICATE YOUR CUTTING-EDGE SERVICES, FACILITIES AND RESOURCES:

#makesciencehappen

TO COMMUNICATE YOUR RESEARCH ADVANCEMENTS, BIG SCIENCE AND BIG RESULTS:

#RImaginescience

4. Resources

4.1. PowerPoint slides

This section provides two PowerPoint slides that you can include in your presentations to explain what European research infrastructures are all about.

Slide 1



RESEARCH INFRASTRUCTURE
(compound noun)

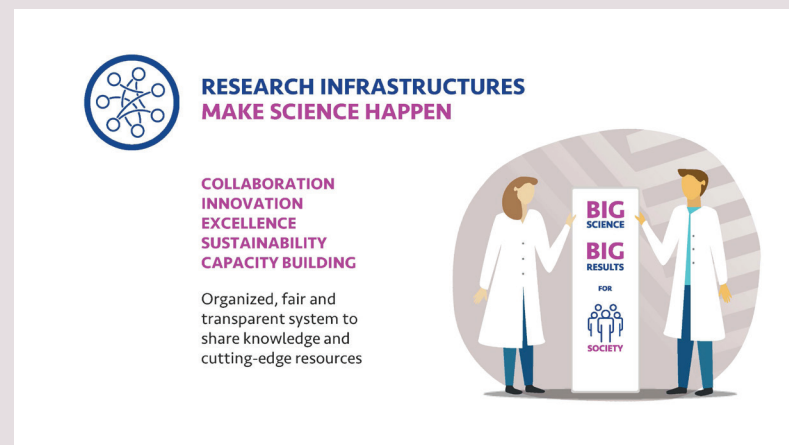
An organization that enables the research community to use specific facilities, resources and services in order to accelerate scientific achievements and promote sustainable research.

DISTRIBUTED **SINGLE-SITED** **VIRTUAL**

This slide features a large network icon at the top left. Below it is the title 'RESEARCH INFRASTRUCTURE' followed by '(compound noun)'. A paragraph defines the term as an organization enabling the research community to use facilities, resources, and services to accelerate scientific achievements and promote sustainable research. At the bottom, three smaller icons represent 'DISTRIBUTED', 'SINGLE-SITED', and 'VIRTUAL' types of infrastructure.

What is a research infrastructure?

Slide 2



**RESEARCH INFRASTRUCTURES
MAKE SCIENCE HAPPEN**

**COLLABORATION
INNOVATION
EXCELLENCE
SUSTAINABILITY
CAPACITY BUILDING**

Organized, fair and transparent system to share knowledge and cutting-edge resources

**BIG
SCIENCE
BIG
RESULTS
FOR
SOCIETY**

This slide features a network icon at the top left. The title is 'RESEARCH INFRASTRUCTURES MAKE SCIENCE HAPPEN'. Below it is a list of five key areas: 'COLLABORATION', 'INNOVATION', 'EXCELLENCE', 'SUSTAINABILITY', and 'CAPACITY BUILDING'. A paragraph describes it as an organized, fair, and transparent system for sharing knowledge and resources. On the right, an illustration shows two scientists in white coats standing next to a vertical sign that reads 'BIG SCIENCE BIG RESULTS FOR SOCIETY'.

What results from the collaboration that research infrastructures enable?

4.2. Targeted Communication

Different target audiences require different approaches. This section presents strategies, guidelines and best-practices to engage with the private-sector, decision-makers and other research infrastructures outside of the EU.

Research infrastructures outside of Europe

Targeting our research infrastructures counterparts outside of Europe requires a close articulation with your research infrastructure management team.

For an effective engagement, you should prepare communication materials and activities adapted to your specific target (the research infrastructure counterpart) and to the strategic goals you aim to achieve by engaging with that target.

EXAMPLE 1:

Specific target: country in South America

Strategic objective: to promote the services of your research infrastructure

Communication materials/activities:

- focus on your service catalogue and access conditions
- translate into Spanish or Portuguese
- adapt to the contact points in those countries (e.g. present possible research outputs of your services if dealing with researchers)

EXAMPLE 2:

Specific target: country in Africa

Strategic objective: establish partnership

Communication materials/activities:

- focus on what research infrastructures are, the added value of becoming a partner and the process by which a partnership may be established
- translate into local language if necessary, use bright colours palettes (usually more appreciated in Africa)
- adapt to the contact points in those countries (e.g. remove technical details if dealing with decision-makers)

Articulate with your management team to answer the question:
What are your **STRATEGIC OBJECTIVES** for this **SPECIFIC TARGET**?

STRATEGIC OBJECTIVES

e.g:

- Establish partnerships?
- Develop new projects?
- Exchange resources?
- Promote your services?



Select content and key messages according to goals

SPECIFIC TARGET

Who are your contacts?

Any language or cultural issues?



Adapt contents and select channels



Adapt to the context and translate

Prepare your communication materials and activities

And while you are at it, contribute to increasing the visibility of European research infrastructures in other parts of the world by:



Explaining what **research infrastructures** are



Describing the **overall context** of European research infrastructures (and where your research infrastructure fits)



Highlighting the **added value** of working with European research infrastructures

Private sector

Targeting the private sector is usually a big challenge for research infrastructures - but not an impossible task. This section presents five rules-of-thumb that will help improve the engagement of this target audience.



1. Target specific types of industry or business

General approaches are less effective than identifying specific types of industry or business and tailor your communication to their needs. It is more demanding, but it pays off.

2. Remove technical details from main messages

The private sector includes people with different backgrounds – many of whom do not have a scientific knowledge base that allows them to understand highly technical details.

Avoid including these technical details and scientific “jargon” in your main messages. Instead, present them as attachments or additional resources available for further reading by those who will be more interested (researchers and technicians who work in the private sector).

3. Present solutions as added values to industry or business

An ideal “hook” to get the attention of industry/business is to focus on the questions that are most relevant to this target:

“What if [this solution] could be discovered? How would this impact your industry/business?”

Another alternative is to focus on the challenges that industry/business face and that your research infrastructure may address. This may be worked very well with content marketing methods and in collaboration with media organizations.

4. Consider following two consecutive steps:

Step 1 - first engage with the high-level individuals in industry and business - the CEOs, CFOs, FMOs, etc – as they are the ones who will decide whether a collaboration with your research infrastructure should be established.

Step 2 - If those who are leading the industry and business decide to establish a collaboration with your research infrastructure, move on to engaging with their researchers and technicians. These are the one who will actually determine how that collaboration could be developed.

Step 1: Target decision-makers within the private sector

Develop your “pitch” in an appealing format, focused on their interests and easy to understand (non-scientific).

“Pitching” your research infrastructure to private sector’s decision-makers

- Explain the value of your services for industry (e.g.: developing new products, increasing the efficiency of existing products).
- Provide an overview of how an eventual collaboration with your research infrastructure may be profitable over the next 5-10 years.
- Outline the main procedures involved (e.g.: how and when the research infrastructure may be used and what this will cost, data protection and competition issues).
- Show examples of:
 - success stories or case studies
 - costumers you have collaborated with
 - business areas that have benefited from your services
- Provide your contacts.

Step 2: Engage with the researchers working in business and industry

Present what your research infrastructure provides, including all technicalities (be prepared to provide information and details). Your message should be interesting, professional and convey trust in your organization.

Decision-makers

Decision-makers comprise a highly heterogeneous group, with:

DIFFERENT BACKGROUNDS

Many decision-makers do not have a background in science, and those who have it may not be familiar with your research infrastructure's field of expertise or even with the concept of research infrastructures.

DIFFERENT LEVELS OF DECISION-MAKING

From local administration to the European Union level, this target group presents different competences and responsibilities.

DIFFERENT INTERESTS

Decision-makers have their own agendas, i.e., specific policies and measures that they want or have to implement.

Engaging with such a heterogeneous group requires a tailored approach in which you must first "know your target" (step 1) in order to adapt your "pitch" to this target (step 2), before planning communication materials and activities (step 3).

Decision-makers

STEP 1: Know your target

Different backgrounds

Does your target have a scientific background?
Has your target ever worked in other sectors, or only in politics?

Different levels of decision-making

What action can a decision-maker with this remit take to help your infrastructure?
What are the limitations?

Different interests

What policies or measures is your target interested in implementing?

STEP 2: Adapt your "pitch" to your target

Clear messages

Avoid technical details and acronyms.
Provide **BIG PICTURE**:

- What are research infrastructures?
- Importance of your research field?

Adapt pitch

What are the specific competences of your target?
(e.g.: preparing legislation?
attributing funding?)

Highlight the contribution

To what extent can your research infrastructure contribute to the policies/measures that interest your target?

STEP 3: Prepare your communication materials and activities

And while you are at it, contribute to increasing the visibility of European research infrastructures in other parts of the world by:



Explaining what **research infrastructures** are



Describing the **overall context** of European research infrastructures (and where your research infrastructure fits)



Highlighting the **added value** of working with European research infrastructures

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To become sustainable over time, European research infrastructures must increase their visibility, both individually and collectively. For this, their communication must become more effective and consistent.

This toolkit is a collective effort of 31 communication experts representing 17 research infrastructures to provide an easy and useful set of communication tools, guidelines and resources. It aims to ensure that European research infrastructures “speak the same language” and effectively engage with different sectors, thus increasing their collective visibility and consolidating their presence in the scientific research realm.

