

# D2.1 Dissemination and Valorisation Plan



Observing and Negating Matthew Effects  
in Responsible Research and Innovation  
Transition



Version 1.0  
Public

This deliverable presents ON-MERRIT's Dissemination and Valorisation Plan, which details the project's plan to engage a wide audience and disseminate results. It is structured in planning the activities, specific activities, observation of impact and success and reflection on this approach itself.



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### D2.1 - Dissemination and Valorisation Plan

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## Abbreviations

CoC: Code of Conduct

KER: Key Exploitable Result

KNOW: Know-Center GmbH Graz

KPI: Key Performance Indicator

OU: Open University

RFPO: Research Funding and Performing Organization

RRI: Responsible Research and Innovation

SDGs: Sustainable Development Goals

SME: Small and medium-sized enterprises

TU Graz: Technical University Graz

UGOE: Georg-August-Universität Göttingen

UMINHO: University of Minho

## Executive Summary

ON-MERRIT investigates how and if current open and responsible research policies could worsen existing inequalities. The project targets an equitable scientific system that rewards based on merit rather than “cumulative advantage” (the so-called “Matthew Effect”). The concepts of Responsible Research & Innovation (RRI) and Open Science aim to shift academic culture towards transparency and participation in research processes. Yet making processes open will not per se drive re-use or participation unless also accompanied by the capacity to do so.

In this *Dissemination, valorisation and participation plan*, ON-MERRIT describes how the project is raising awareness about existing inequities and disseminating results on how to address them. Following a general approach of PLAN, ACT, OBSERVE and REFLECT, ON-MERRIT initiated its communication activities by identifying academic communities, researchers, funders, industry, policy-makers and the society at large as target audience. Furthermore, we selected key results to be exploited and disseminated among these groups. The results include primary evidence and their summaries of (non-) existence of Matthew Effects in RRI, as well as policy briefings and recommendations for funders and institutions.

ON-MERRIT uses formal and informal formats to disseminate results and ensure their uptake. On the one hand, the project team is publishing evidence in peer-reviewed journals, is releasing regular blog posts and has built a website. On the other hand, ON-MERRIT uses social media to interact with the community and plans to organize workshops and other activities to engage stakeholders throughout the project. The first actions included the launch of the project website, the creation of the project identity and a toolkit consisting of templates, guidelines and dissemination materials such as stickers and leaflets to support the outreach potential of each consortium partner.

ON-MERRIT agreed on a set of key performance indicators (KPIs), such as social media interaction, number of policy briefings, blog posts and publications, to measure impact and success of communication activities. The *Dissemination, valorisation and participation plan* and the KPIs will be reviewed twice a year to ensure that all measures contribute to successful dissemination and that actions can be adapted if necessary.

# 1 Introduction

This ON-MERRIT *Dissemination, valorisation and participation plan* (D2.1) details how the project will build awareness and facilitate the uptake of project results. It presents the plan for dissemination and exploitation, including key stakeholders and strategies for achieving awareness, understanding, trust and action. The plan details which messages to be directed to which audiences, and records the timeline of activities and engagement with relevant stakeholders. Dissemination activities include informal media (e.g. blog articles) as well as the publication of policy briefings and research papers. Our communication activities follow the general approach of PLAN, ACT, OBSERVE, REFLECT and this deliverable is structured accordingly.

- PLAN: ON-MERRIT is planning a series of activities, following the “who?, what?, why?, when?, how?” approach. Chapter 2 describes ON-MERRIT’s strategy for dissemination of results and engagement of stakeholders.
- ACT: ON-MERRIT is undertaking planned actions in line with the *Dissemination, valorisation and participation* plan considering the needs of the parties involved and the urgency of the matter. Chapter 3 details the activities initiated in the first months of the project and outlines specific activities aligned with the project’s milestones and deliverables.
- OBSERVE: ON-MERRIT developed an extensive set of Key Performance Indicators (KPI). KPIs exist for breadth and depth of coverage, and the comprehensiveness of the campaign. Chapter 4 lists KPIs to measure the impact of ON-MERRIT’s work.
- REFLECT: The dissemination manager will update the plan periodically, based on the feedback received and impact achieved. Chapter 5 describes how we will reflect on ON-MERRIT’s dissemination activities and adjust them accordingly.

## 2 Plan - Strategy

ON-MERRIT plans its communication activities considering the questions:

- Who are we targeting?
- What are we disseminating?
- Why does the project want the stakeholder informed?
- When is the project going to be ready to disseminate this?
- How should these results best be communicated, at this time, to this stakeholder for this purpose?

Chapter 2 includes an overview of the current situation, a definition of project results, a breakdown of target audiences and strategies to ensure awareness and engagement.

## 2.1 Situation overview

ON-MERRIT targets an equitable scientific system that rewards based on merit rather than “cumulative advantage” (“Matthew Effect”). Responsible Research and Innovation (RRI), including elements like Open Science and Gender Equality, promises to fundamentally transform scholarship to bring greater transparency and participation to research processes, and increase the impact of outputs.

Yet just making processes open will not per se drive re-use or participation unless also accompanied by the capacity to do so. Absorptive capacity and ability to capitalize on knowledge resources vary considerably amongst business, researchers and the general public. Those in possession of such capacities are at an advantage, with the effect that RRI’s agenda of inclusivity is put at risk by conditions of the “Matthew Effect”.

Recognising this key threat to RRI, ON-MERRIT deploys a cutting-edge combination of qualitative and computational methods that use stakeholder participation and co-design in examining the extent of the Matthew Effect in key RRI elements. ON-MERRIT then synthesises evidence-based policy recommendations on how RFPOs and others can amend policies, indicators and incentives to address and/or mitigate these effects.

The communication team ensures ON-MERRIT’s liaison, engagement and alignment with all relevant stakeholders and communities from research, industry, policy-making and civil society actors from the selected disciplinary areas. It leads participatory processes to engage stakeholders in the co-creation of research instruments and analyses, builds awareness about the project in domains of interest and facilitates the uptake of the results.

## 2.2 Precise definition of exploitable results

According to the Horizon 2020 text<sup>1</sup>, a result is defined as “Any tangible or intangible output of the action, such as data, knowledge and information whatever their form or nature, whether or not they can be protected, which are generated in the action as well as any attached rights, including intellectual property rights”. A Key Exploitable Result (KER), meanwhile, is “an identified main interesting result (as defined above) which has been selected and prioritised due to its high potential to be “exploited” – meaning to make use and derive benefits – downstream the value chain of a product, process or solution, or act as an important input to policy, further research or education.”

Following the criteria of degree of innovation, exploitability and impact, Table 1 below lists ON-MERRIT’s key main exploitable results.

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<sup>1</sup> <https://webgate.ec.europa.eu/funding/display/ECResearchGMS/Projects+and+results>  
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These results consist of either primary evidence of the (non-) existence of Matthew Effects in RRI transition, which is to be expected per se to directly influence research and policy agendas, concise summaries of these findings according to disciplinary and gender aspects, and policy briefings and recommendations for funders and institutions.

Task	Deliverable	Result	Month
T3.2	D3.2	RRI and Open Science incentives and indicators, in particular in the context of career promotion	24
T3.3	D3.3	Uptake of RRI and Open Science principles in relation to policy and training	24
T4.2	D4.2	Drivers and barriers of uptake of Open Science resources in industry	24
T5.2	D5.2	Uptake of Open Science in information seeking practices in policy-making	21
T5.3	D5.3	Policy briefings about barriers to participation	24
T6.2	D6.2	Scenario modelling of interventions to overcome Matthew effects in RRI and Open Science	28
T6.3	D6.3	Insights into disciplinary and gender aspects through case studies	28
T6.4	D6.4	Practical guidelines and policy recommendations	30

*Table 1 - Exploitable results*

## 2.3 Key Stakeholders

Exposing key audiences (academic communities, researchers, funders, industry, policy-makers, society at large) to ON-MERRIT activities and outputs is crucial to maximising its impact. The expertise of the project consortium and the knowledge transfer within the RRI and Open Science communities ensure that ON-MERRIT has a deep understanding of the relevant stakeholders in research, industry, policy-making and societal settings. This further is enhanced through the outreach and co-creation activities during the project building on the individual skills and community memberships of the project partners. Moreover, embedding ON-MERRIT within the landscape of past and ongoing RRI and Open Science activities is essential for impact, both in terms of engaging and leveraging established networks of actors already familiar with and invested in these topics, but also for ensuring synergies and avoiding overlaps with former work and activities of related projects. The intended impact of the dissemination strategy cuts across several areas which are considered crucial to the successful exploitation of ON-MERRIT's outcomes. In particular this targets training and policy

recommendations, as shown in Table 2. The table lists for each stakeholder group one or several outreach champions. These members of the consortium have relevant contacts and/or connections to this particular audience and will use them for ON-MERRIT outreach purposes.

Stakeholder	Areas	Description	Outreach Champion
Research performing institutions	Education, Research	Researchers or support staff in academic institutions who engage in RRI and Open Science education and training, and/or oversee research assessment criteria for hiring and promotion	UMINHO, UGOE
Young scholars	Research	Early career researchers who benefit from guidance and advice on RRI and Open Science practices, and related benefits and challenges	UGOE, UMINHO
Senior researchers	Research	Senior academics of influence whose voices can be engaged to provide crucial feedback and amplify messages	KNOW
Local, national and EU policy makers and funders	Policy makers	Decision-makers of governmental and funding agencies that design interventions and funding programmes related to RRI and Open Science, at national, European and international levels	UMINHO, UGOE, TU GRAZ
Societal actors	Society	Stakeholders and civil society actors, especially those who engage in Agriculture, Climate, and Health	TU GRAZ

SMEs and startups	Industry	Economic actors of various sizes who can be engaged in the uptake of RRI and Open Science resources to stimulate economic activity	KNOW
Publishers	Industry, Research	Publishers who engage in activities that support RRI and Open Science and the reassessment of relevant publishing-related metrics and indicators	KNOW, UGOE
RRI and Open Science practitioners and researchers	Research	Existing networks and initiatives actively working to support or research issues related to RRI and Open Science implementation	OU, UGOE

Table 2 - Target Stakeholders

## 2.4 Strategies for achieving awareness, understanding, trust and action

As stated above, maximal impact of project results can only be achieved to the extent that key stakeholders are *aware* of ON-MERRIT activities and results, *understand* the issues, *trust* the quality of the evidence and policy analyses, and *act* based on key recommendations. We next detail the overall strategies ON-MERRIT adopts to ensure this is achieved.

### 2.4.1 Ensuring awareness

The first step in creating awareness of ON-MERRIT and its outputs was the creation of an engaging project identity (including logo and graphical layout guidelines) to create a strong and recognizable ON-MERRIT brand and key messages to be used on all dissemination material. Various channels are engaged here, including project website and blog, social media accounts, various media outlets, as well as audience-specific channels (e.g., policy briefs for policy makers), in addition to more traditional dissemination via conferences, workshops and scientific journals. Stakeholders are presented with the results of the project and continuously informed about the project and its progress through dedicated blog posts, social media, and the project website.

The activities conducted in the first months of the project are described in [3.1 Initial dissemination activities M 1-6](#).

## 2.4.2 Ensuring understanding

ON-MERRIT ensures understanding of the issues by tailoring key messages for specific audiences and disseminating them via the channels most likely to reach that group (see [Key messages](#)). Industry players expect a different style of presentation and language than policy-makers, for example. Moreover, it is essential to provide the right level of depth to engage the audience to discover and learn more without burdening them with unneeded detail. This targeting and framing of messages is supported by ensuring references to rich information resources via the project website, with links to sources of further information (including project deliverable reports, other project outputs, as well as third-party material). Regional uptake is aided by the translation of essential briefing documents and infographics into languages other than English where relevant and needed. Finally, but perhaps most importantly, ON-MERRIT's participatory methodologies, which include stakeholders in meaning-making and validation processes, do not only aid in the communication of key messages, but also engage these stakeholders in critically reflecting for themselves upon the issues at hand. Table 2 below shows the main proposed communication methods for each stakeholder group.

Target audience groups	Proposed main communication channels
RRI and Open Science practitioners and researchers	Partner networks, conferences and events, peer-reviewed journals, mailing lists
Senior researchers	Conferences and events, interviews and workshops, online media, peer-reviewed journals, mailing lists
Young scholars	Blog and online media, conferences and events, peer-reviewed journals, mailing lists
Research performing institutions	Conference and events, journals, briefing documents, mailing lists
Publishers	Events, media, mailing lists
Local, national and EU policy-makers and funders	Policy briefings, face-to-face meetings, interviews and workshops, events
SMEs and start-ups	Industry events, industry media
Societal actors	General media (via press releases), blogs and online media, special interest groups

*Table 3 - Proposed main communication methods per target stakeholder*

### 2.4.3 Ensuring trust

ON-MERRIT ensures trust in its results by embodying the RRI and Open Science principles it espouses. The project makes its research aims, methods, data and outputs FAIR (findable, accessible, interoperable and reusable) via innovative open science and science communication platforms and tools. The project has established a community channel on Zenodo, which functions as a project collaboration environment as well as a platform for publishing non-traditional research outputs. This has happened right from the start, with the publication of this communication and valorisation plan as well as the Data Management Plan. Continuous project updates and stakeholder feedback are delivered via a regularly updated project blog, which is the primary dissemination point for preliminary results and first findings.

Adherence to the EC's Open Access and Research Data Management policies ensures that all research publications and the fullest extent of the research data gathered, are made openly accessible to all. All software and code, including that needed to reproduce project results, are suitably and sustainably archived and made available for re-use (see D1.2 Data Management Plan for details). Trust is also maintained by the sustainability and visibility of the research results, including after the project's lifetime, via the project website and the re-use of ON-MERRIT resources by continuing initiatives.

### 2.4.4 Ensuring action

By engaging stakeholders right from the start, leveraging existing networks, and targeting messages for specific audiences, ON-MERRIT sets the scene for the effective uptake of results. Through the creation of a transparent basis of evidence, ON-MERRIT is able to offer trusted outcomes, which then are disseminated via tailored communication measures, e.g. practical guidelines, policy briefs, factsheets, white papers, academic papers, infographics, and calls-to-action for specific stakeholders. A final project workshop in project month 28 will target all stakeholder groups in an interactive discussion of project results and their implications.

## 2.5 Stakeholder engagement strategy

ON-MERRIT's success depends on the extent to which stakeholders engage with and participate in project activities. The team conducts co-creation activities where useful and possible. Target groups are approached at various levels as listed in Table 4 below. The table briefly outlines the dissemination aims, methods and stakeholders of each level.

Dissemination Aims	Methods and Activities	Status
<b>Level 1: ON-MERRIT internal communication</b>		
Establish communication mechanisms and channels within the consortium and to share ON-MERRIT's progress with relevant team members	- Establish project and main use case members' mailing lists	COMPLETED - mailing lists for all WPs, the consortium & legal & financial support staff
Facilitate and support direct collaboration and information sharing among partners	- Establish virtual communication and collaboration tools for consortium members  - Organise dedicated WP team meetings within plenary or ad hoc meetings	COMPLETED - regular WP & Consortium Calls conducted online via GoTo Meeting
Provide guidance for communication and create single point of reference for all dissemination material and practices across consortium	- Develop document with dissemination guidelines and practices  - Provide templates and materials for dissemination activities planning, implementation and reporting	COMPLETED - shared folder with guidelines, templates and materials
Link and bring together people working on similar topics across consortium, in order to create working groups that will implement common activities	- Carry out team member interviews for project website and blog posts  - Organise dedicated vision building session within Kick Off and after each review meeting	ONGOING - Vision building meeting to define key messages during kick off
<b>Level 2: Towards core target groups through direct networks</b>		
Establish links with relevant networks and communities that partners are involved in	- Utilise engagement in other activities e.g. FIT4RRI, OpenAIRE, OpenMinTeD, FOSTER, LIBER  - Contribute to webinars and (online) training activities	ONGOING - Twitter account established + joined RRI_eu account, joining Swafs ecosystem organized by SUPERMORRI

	<ul style="list-style-type: none"> <li>- Use Twitter to create awareness in existing networks</li> <li>- Organise special training and hands on sessions or workshops at events where communities gather</li> </ul>	
Organise targeted actions to inform and engage scientists in the networks and communities where partners have direct access to	<ul style="list-style-type: none"> <li>- Utilise considerable skills and experiences of consortium in outreach, public engagement and stakeholder consultation</li> <li>- Organise ON-MERRIT workshops or sessions at RRI and Open Science events</li> <li>- Use local networks to get feedback and disseminate results (i.e., Partnerday @KNOW for 50+ industry partners)</li> </ul>	ONGOING - organized panel session at Open Science Conference (event was cancelled), hosting Open Science track at STS Conference 2020 in Graz
Take advantage of open data and open research initiatives and movements where partners are involved	<ul style="list-style-type: none"> <li>- Study implementation priorities of connected networks and identify challenges, data, tools and potential pilots of high visibility/importance</li> </ul>	TO BE STARTED
<b>Level 3: Towards other stakeholders and decision-makers</b>		
Establish links with new RRI and Open Science research projects and initiatives	<ul style="list-style-type: none"> <li>- Collaborate with other SwafS projects (e.g. by visiting key institutions, meeting with project coordinators or organising workshops and events together with other related projects)</li> </ul>	ONGOING - attended SUPERMORRI annual event
Organise targeted actions to inform and engage scientists, publishers, SMEs, policymakers, societal actors and others providers outside the partner networks	<ul style="list-style-type: none"> <li>- Organise ON-MERRIT representation and booths in major conferences and exhibitions, distribute leaflets etc.</li> <li>- Organise social media campaigns</li> </ul>	ONGOING - distributed leaflets & stickers at Open Science Barcamp and conference 2020 in Berlin

	- Loop-back findings of ongoing research to integrate stakeholder experiences and skills	
Carry out actions informing institutions and networks of strategic importance (e.g. funding agencies, donors, decision makers)	- Actively invite policymakers, advisors and intermediary actors to contribute to ON-MERRIT events  - Prepare information material for decision makers	TO BE STARTED (Month 12)
Promote project outcomes and opportunities to RRI and Open Science stakeholders and foster further engagement (e.g. related start-ups)	- Reach out through targeted messages and channels	TO BE STARTED (Month 8)
Inform general public	- Prepare press releases for distribution in all partner countries	TO BE STARTED (Month 24)

*Table 4 - Dissemination network-building strategy*

### 2.5.1 Co-creation activities in ON-MERRIT

ON-MERRIT involves different stakeholders to co-create knowledge throughout the project's design, e.g. with regard to research questions, methodology, contextual inquiries, survey instruments and analysis of results. In particular co-creation is relevant for:

- WP 3 Research cultures, support and incentives
  - Involving stakeholders by attending conferences and presenting papers, posters and workshops to receive feedback.
  - Surveying individuals with research contracts on open science practices.
- Task 3.3 Uptake of RRI and Open Science principles in relation to policy and training
  - This task will gather input from different initiatives and share the results with the OpenAIRE CoP of training coordinators.<sup>2</sup>
- Task 4.2 Readiness to exploit Open Science resources amongst economic actors
  - Contextual inquiries: The guidelines for the contextual inquiries to investigate the uptake of open science/data/access in SMEs and larger companies are developed based on the literature review done in T4.1. Secondly, they will be discussed and

<sup>2</sup> The OpenAIRE Community of Practice for Training Coordinators is an informal network to share training experiences. Experienced trainers from a wide range of initiatives and projects come together in this group.

further improved with other researchers working also in the area of open science/open data/open access. Finally, they will be tested in SMEs in Austria and improved according to the input given by the interview partners.

- Questionnaire: The questionnaire also will be based on the literature review conducted in T4.1 and will already take into account the results and insights gained from the contextual inquiries conducted. The first version of the questionnaire will be sent out to only a view selected participants to further improve it before it will be distributed in several countries.
- Task 5.3 Mapping participation in RRI policy-making
  - This task will organize several co-creation workshops. Invited experts will be asked to share experiences of participatory processes and to reflect on possible barriers to participation.

### 3 Act - Communication Activities

Throughout the project, continuous and inclusive communication activities increase awareness of ON-MERRIT's goals and progress, as well as help to promote the discussion about the ongoing RRI and Open Science transition. For achieving awareness, understanding, trust and action, the following main objectives are critical for ON-MERRIT's communication efforts:

- Establish a clear set of agreed external communication messages.
- Convene a welcoming, barrier-free and constructive public discussion.
- Promote inclusiveness and diversity in academia, industry and society.

ON-MERRIT is using a multi-channel approach where different communication mediums are used to achieve impact. Table 5 summarises the communication means, grouped by types of activities.

What	How	Why	Status
<b>Internal communication</b>			
Aim: Effective communication across the consortium to coordinate actions/activities and mitigate risks			
<b>Internal communication channels</b>	<ul style="list-style-type: none"> <li>- Create mailing list for the whole consortium and specific communication needs</li> <li>- Organise virtual meetings on a monthly basis</li> </ul>	<ul style="list-style-type: none"> <li>- Support structured yet informal communication to align and support joint tasks</li> </ul>	COMPLETED - mailing lists (per WP and key topics (finances, legal support staff) created, monthly meetings

	- Creation of templates for project reports and deliverables		established and templates provided
<b>Internal news briefing via email</b>	- Led by dissemination and participation WP lead, a summary of events, outreach, public discussions will be sent every six months	- Transparency among consortium about all outreach and communication activities	ONGOING - first news briefing to be sent out in March
<b>Promotion and participation</b> Aim: Ensure broad awareness of project aim and activities within stakeholder communities, and motivate stakeholders to take part in processes of co-design and validation			
<b>Project website</b>	- Launch website - Highlight project news	- Awareness of project activities - Create strong project identity for stakeholders	ONGOING - website launched, first news online
<b>Social media</b>	- Create a comprehensive social media strategy - Timely announcements, promotion and discussion via Twitter	- Regular interaction with key stakeholders, particularly in academia - Highlighting ON-MERRIT's progress	ONGOING - Twitter account created
<b>Leaflets, stickers</b>	- Digital and physical presentation of value-based branding	- Visual, short messaging to raise awareness	COMPLETED - Leaflets and stickers created
<b>Factsheets</b>	- Summarise key objectives and findings - Create and include infographics that visually support key messages and facts	- Effective advocacy	TO BE STARTED (Month 8)
<b>Cross-promotion</b>	- Invite RRI and Open Science initiatives to work together in promoting the project's progress (digital and joint event attendance)	- Increasing visibility - Liaising with related initiatives e.g. OpenAIRE, FIT4RRI, RDA to support	TO BE STARTED (Month 8)

		and promote the aligned objectives	
<b>Blog</b>	<ul style="list-style-type: none"> <li>- Write and share regular blog posts about project's progress and related developments</li> </ul>	<ul style="list-style-type: none"> <li>- Activating the community</li> <li>- Gathering feedback for co-creation activities</li> </ul>	ONGOING - first blog posts online, one in progress
<b>Discussion sessions</b>	<ul style="list-style-type: none"> <li>- Organise and convene Twitter live chats</li> <li>- Organise and convene webinars</li> <li>- Organise and convene sessions in RRI and Open Science events</li> </ul>	<ul style="list-style-type: none"> <li>- Engaging with targeted communities</li> <li>- Gathering feedback for co-creation activities</li> </ul>	ONGOING - first sessions at conferences organized
<b>Social Coding</b>	<ul style="list-style-type: none"> <li>- Create and maintain ON-MERRIT GitHub account</li> <li>- Share source code and data of ON-MERRIT's quantitative analysis</li> </ul>	<ul style="list-style-type: none"> <li>- Engaging with targeted communities</li> <li>- Providing a feedback mechanism for data analytics (issue tracker)</li> <li>- Encourage source code and data contributions (pull requests)</li> </ul>	ONGOING - GitHub account created
<b>Code of Conduct</b>	<ul style="list-style-type: none"> <li>- Creation of the ON-MERRIT Code of Conduct (<a href="#">CoC</a>) outlining agreed behaviour for conducting research and interacting with various stakeholders.</li> <li>- Make CoC available via the website and on the GitHub repository</li> </ul>	<ul style="list-style-type: none"> <li>- Ensure civil conversation within and outside the project consortium</li> </ul>	ONGOING - CoC written

### Dissemination

Aim: Effective knowledge-transfer to educate and inform stakeholders regarding project results and their implications, and enable the re-use of project outputs

<b>Corporate identity</b>	- Create an engaging project identity	- Create a strong and recognizable ON-MERRIT brand to be used on all dissemination material	COMPLETED - designed logo, selected key message and provided graphical layout guidelines
<b>Communication toolkit</b>	- Create templates for ON-MERRIT presentations	- Support consortium members representing the project at events	COMPLETED- created poster template and slide decks for presentations to introduce the project in 4 and 6 minutes
<b>Peer-reviewed publications (see <a href="#">Annex 2</a>)</b>	- Submit articles to relevant peer-reviewed journals or conference proceedings	- Publicize ON-MERRIT research results and disseminate ON-MERRIT findings to a wide academic audience - Enable discussion, feedback and criticism	ONGOING - first article in progress
<b>Conference and poster presentations</b>	- Present and publicize research results at topic-related conferences - Engage and discuss results with peers	- Disseminate early results to receive feedback from peers and provoke discussion of and interest in ON-MERRIT amongst different research and practitioner communities	ONGOING - first poster presentation held at SUPERMORRI annual event
<b>FAIR datasets and code</b>	- Make datasets and code created as a result of ON-MERRIT research openly findable via open repositories	- Enable trust in research integrity - Enable reproducibility of results - Enable data re-use (via open licensing)	ONGOING - Data Management Plan written

<b>Policy briefings</b>	<ul style="list-style-type: none"> <li>- Collaboratively write policy briefings</li> <li>- Publish them on the ON-MERRIT website and circulate among the stakeholder network (e.g. ministries, NGOs, funding agencies etc.)</li> </ul>	<ul style="list-style-type: none"> <li>- Make ON-MERRIT results on Matthew effects in Open Science and RRI accessible to policymakers, national and regional officials, funding agencies and other non-academic stakeholders</li> </ul>	TO BE STARTED (Month 24)
<b>Media engagement</b>	<ul style="list-style-type: none"> <li>- Issue press releases to accompany major project milestones/research findings</li> <li>- Publish them on the ON-MERRIT website</li> </ul>	<ul style="list-style-type: none"> <li>- Make ON-MERRIT results accessible to the wider public and circulate among press outlets</li> <li>- Ensure pertinent messages are targeted to specific stakeholder communities and specialist presses</li> </ul>	TO BE STARTED (Month 24)

*Table 5 - ON-MERRIT Communication and dissemination plan*

### 3.1 Initial dissemination activities M 1-6

Complementing the overview given in table 5, this chapter details the dissemination activities done in the first six months of the project. Table 6 gives an overview of ON-MERRIT's initial dissemination activities, including milestones and deliverables relevant for this work package.

Activities	M1	M2	M3	M4	M5	M6
<b>Internal communication</b>	Set up mailing lists	Create templates	Create CoC			
<b>External communication channels</b>		Set up Twitter account	Launch website			
<b>Events</b>				Poster presentation		Conference panel
<b>Materials</b>					Create flyer and sticker	
<b>Milestones</b>			M2.1 Website online			

<b>Deliverables</b>						D2.1
<b>Project phase</b>	ON-MERRIT phase 1 - Preparation					

*Table 6 - Overview of initial dissemination activities*

### 3.1.1 Project colours

We chose the following primary colours for the logo and corporate identity of the project:

#### Blue



- R= 0 G= 135 B= 203
- #0087CB
- CMYK – C= 81 M= 36 Y= 0 K= 0

#### Turquoise



- RGB - R= 36 G= 168 B= 172
- #24A8AC
- CMYK – C= 74 M= 9 Y= 35 K= 0

#### Green



- R= 0 G= 160 B= 62
- #00A03E
- CMYK – C= 82 M= 5 Y= 98 K= 0

#### Orange



- R= 246 G= 160 B= 23
- #F6A017
- CMYK – C= 0 M= 44 Y= 93 K= 0

These primary colours can be accompanied by this **light blue**:



- #A6DEF4 R166 G222 B244

### 3.1.2 Logo

All project outcomes, materials and dissemination activities will be branded with the project logo:



*Figure 1 - ON-MERRIT logo*

The font used for the logo is called Poiret One. The logo is inspired by the tiles presenting the Sustainable Developments Goals (SDGs). The boxes represent a cumulative graph, turned on its side it is an arrow moving towards merit:



*Figure 2 - ON-MERRIT arrow*

### 3.1.3 Key messages

At the kick-off event, we initiated a brainstorming activity to find suitable key messages and a main slogan. The key messages are collected in a [living document](#) and can be used and adapted for different purposes and stakeholder groups during the project's lifetime. The consortium agreed on the slogan "Open Science - Who is left behind?" as the main message to be presented on the project website.

The visual identity and the key message form the basis for all further activities, e.g. design of templates, website etc.

### 3.1.4 Website

The website [on-merrit.eu](http://on-merrit.eu) (MS 2.1) was launched in December 2019. The website is the main tool for external communication. It includes information about the project and the ON-MERRIT team. Furthermore, it enables the announcement of upcoming events and the publication/reposting of blog posts. It is also the access point for ON-MERRIT's results. A screenshot is included in this document (see Figure 3).

**on merri** Open Science - who is left behind?

HOME

News Events Results & Materials About

**ON-MERRIT** is a 30 month project funded by the European Commission to investigate how and if open and responsible research practices could worsen existing inequalities. Our multidisciplinary team uses qualitative and computational methods in order to examine advantages and disadvantages in **Open Science** and **Responsible Research & Innovation (RRI)**. ON-MERRIT aims at eventually suggesting a set of evidence-based recommendations for science policies, indicators and incentives, which could address and mitigate cumulative (dis)advantages, so called **Matthew effects**. The project acronym stands for **Observing and Negating Matthew Effects in Responsible Research & Innovation Transition**.

**News<sup>+</sup>**

- **ON-MERRIT hosts Open Science track at STS Conference 2020<sup>+</sup>** | 16.12.2019
- **ON-MERRIT kick off<sup>+</sup>** | 04.11.2019

**Events<sup>+</sup>**

All project events will be announced in this area.

**Find us at**

[ON-MERRIT on Twitter<sup>+</sup>](#)

**About<sup>+</sup>**

In this area you can find more information about the project activities and the team.

**Results & Materials<sup>+</sup>**

In this area you can find presentations, reports and dissemination material from the project.

KNOW center | The Open University 50 YEARS | TU Graz | Universidade de Blinhe | SUB NIEDERSÄCHSISCHE STAATS- UND UNIVERSITÄTSBIBLIOTHEK GÖTTINGEN

The research leading to these results has received funding from the European Union's Horizon 2020 Research and Innovation Programme under Grant Agreement number 824612

Figure 3 - Website [www.on-merrit.eu](http://www.on-merrit.eu)

### 3.1.5 Social Media

ON-MERRIT uses social media channels to amplify events before, during and after. The Twitter account [@onmerri](https://twitter.com/onmerri) was set up as the main social media channel and might be extended with more platforms.



Figure 4 - ON-MERRIT Twitter account

Right from the beginning a collaboration with [RRI eu](https://www.rri.eu) was established. This Twitter account is a joint initiative of several Swafs projects to ensure a wide outreach of messages.



Figure 5 - RRI\_eu collaboration

### 3.1.6 Materials

The dissemination team will work on a range of materials for the purpose of communicating project activities and results (e.g. posters, stickers and other materials for events). The first material available to distribute at events is a set of ON-MERRIT hexagon stickers promoting the messages: evaluation/promotion/participation/rewards based on merit (see Figure 6).

Figure 6 - ON-MERRIT sticker

In addition, a project flyer was designed (see Figure 7).

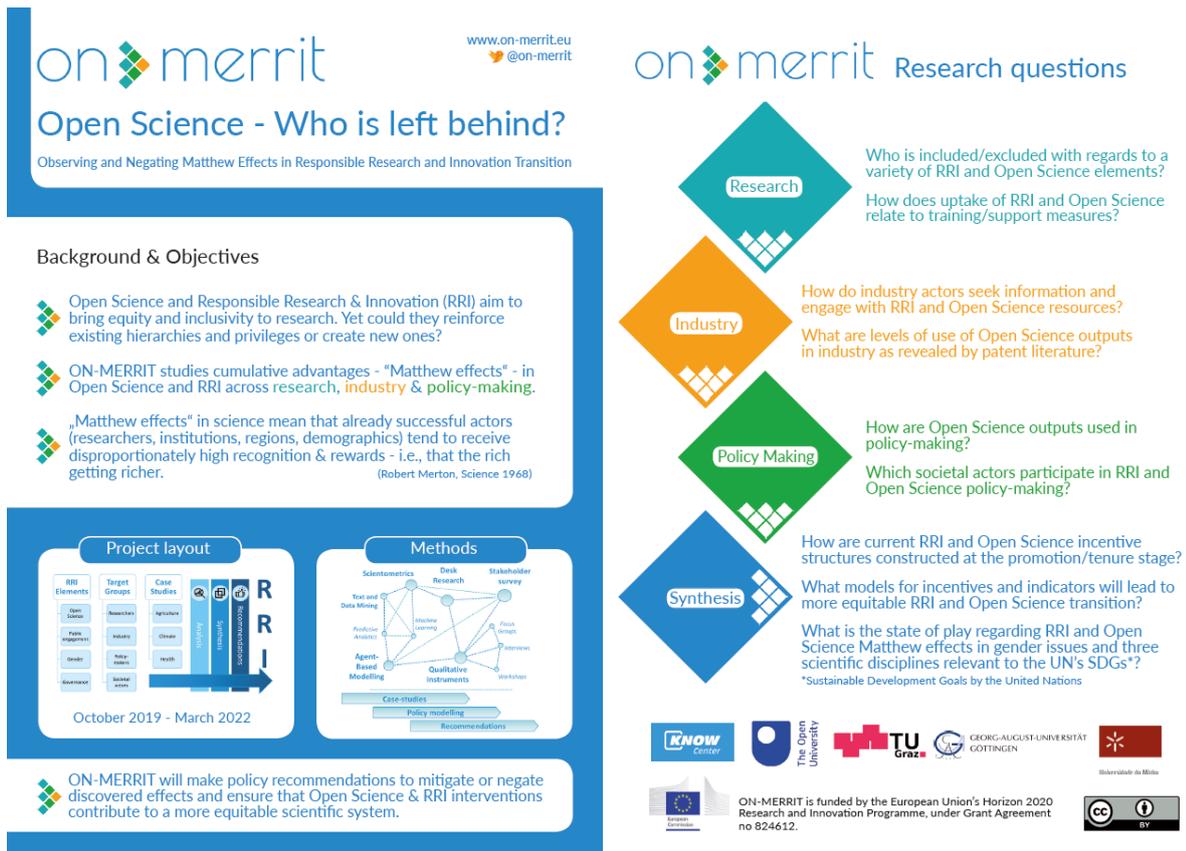


Figure 7 - ON-MERRIT flyer

### 3.1.7 Events

Proactive participation in third-party events and exhibitions to liaise with ongoing or emerging RRI and Open Science initiatives is a key area to ensure awareness and participation. During the first months the project focus was on setting up internal communication procedures as well as a plan for external communication. In the coming months and in particular when first results are available, ON-MERRIT will increase its pro-active participation in events. We created a shared spreadsheet to keep track of visited and upcoming events (list included in [Annex 1](#)).

### 3.2 Plan of Activities M7-30

Table 7 shows an overview of potential future dissemination activities, including milestones and deliverables relevant for these dissemination activities. This table will be further completed during the project's lifetime.

Activities	M7	M8	M9	M10	M11	M12
Internal communication						

<b>External communication channels</b>		Make first deliverables publicly available via Zenodo and link to it from website		Blog post on initial analysis of the current state of RRI and Open Science training and relationship to institutional policies		Survey & plan on how to reach stakeholders to achieve representative results across Europe + survey available on website
<b>Events</b>						
<b>Materials</b>						
<b>Milestones</b>				M3.1 RRI and Open Science Training and Policy Map		M4.1 Launch of survey of industry M5.1 Launch of survey of policy makers
<b>Deliverables</b>		D3.1, 4.1, 5.1				
<b>Project phase</b>	ON-MERRIT phase 2 - active research					

<b>Activities</b>	<b>M13</b>	<b>M14</b>	<b>M15</b>	<b>M16</b>	<b>M17</b>	<b>M18</b>
<b>Internal communication</b>						
<b>External communication channels</b>			Make results available via website & blog posts			Blog post reporting first results from T3.2 and 3.3 as well as T4.2 and 4.3
<b>Events</b>						
<b>Materials</b>	Evaluate use and impact of materials and update them if necessary					
<b>Milestones</b>			M6.1 Initial briefing notes on Matthew effects for research, industry and policy makers			M3.2 Interim conclusions from WP3 M4.2 Interim conclusions from WP4 + patent corpus
<b>Deliverables</b>						
<b>Project phase</b>	ON-MERRIT phase 2 - active research					

Activities	M19	M20	M21	M22	M23	M24
Internal communication						
External communication channels		Blog post reporting on 1st results from T5.2 + 1st reflections on outcomes from expert workshops				Make results available on website
Events						
Materials						
Milestones		M5.2 RRI Expert Workshops				M1.3 Gateway Milestone 2
Deliverables						D3.2, 3.3, 4.1, 4.2, 5.1, 5.2 and 6.1
Project phase	ON-MERRIT phase 2 - active research					

Activities	M25	M26	M27	M28	M29	M30
Internal communication						
External communication channels						Make results available via Zenodo
Events						
Materials						
Milestones				M2.3 Final Workshop		M6.2 Gateway Milestone (3)
Deliverables						D6.2, 6.3 and 6.4
Project phase	ON-MERRIT phase 3 - project ends					

Table 7 - Plan of Activities M7-30

## 4 Observe - KPIs

In order to measure the impact of our activities and success of our dissemination communication efforts, quantified measures for monitoring progress and results will be established from the start. This will assist in prioritising and sharing the work effectively.

Some of the below key performance indicators (KPIs) are baseline activities such as factsheets and will feed directly into the targets the project needs to achieve. Other KPIs are intentionally meant to achieve impact within the communication strategy as a whole and will be refined in line with the communication roadmap, e.g. promotion campaigns.

The progress of KPI targets will be shared within the consortium every six months. Table 8 lists ON-MERRIT's KPIs for impact, the status column will be updated on a regular basis.

KPI description	KPI target	Status
<i>Internal communication</i>		
<b>Workspace engagement</b>	Weekly usage of internal collaboration and communication channels by all project members	ONGOING
<b>Number of internal news briefings via email</b>	6 internal news briefings via email	STARTING IN MONTH 6
<i>Promotion and participation</i>		
<b>Reference of the ON-MERRIT values on another website</b>	1-2 RRI and Open Science initiatives positively refer to ON-MERRIT's communication values	
<b>Factsheets dissemination</b>	1-2 factsheets created and shared on the website as well as directly sent to at least 10 European and national policy bodies	
<b>Participation in policy consultations</b>	3-4 invitations to contribute to RRI and Open Science policy development	
<b>Social media engagement</b>	Regular engagement with ON-MERRIT via Twitter; Tweets related to the project; 500 Followers at the end of the project; 6 Twitter campaigns (e.g., conference live tweeting, Twitter discussions with novices and experts)	108 follower
<b>Joint RRI and Open Science campaigns</b>	2-3 joint promotional campaigns with related initiatives (e.g., SPARC Europe, OpenAIRE, FIT4RRI, FOSTER and equivalent new Open Science / RRI projects)	

<b>Blog activity</b>	18 blog posts including cross-posts and news items, number of visitors on website	2 items, 1 in progress
<b>Stakeholder engagement</b>	60-80 interviews conducted, number of people reached with the questionnaire	
<b>Dissemination</b>		
<b>Sharing of dissemination outputs</b>	100 % immediate open access to all dissemination outputs, publications and datasets	
<b>Reference in RRI and Open Science policy documents</b>	1-2 policy documents referring to ON-MERRIT outputs	
<b>Peer-reviewed publications accepted</b>	At least 5 peer-reviewed journal or conference proceedings articles presenting project results (e.g., Science and Public Policy, Research Evaluation, PLOS One, PeerJ, Science Technology and Human Values, Journal of Responsible Innovation, Sustainability (Switzerland), Publications, F1000Research, Ethics and Information Technology) and made Open Access (green or gold)	
<b>Conference speaking engagement</b>	At least 8 public presentations/posters at topic-related conferences or workshops (e.g., Elpub, LIBER, Science and Technology Indicators (STI), EuroScience Open Forum (ESOF), ASIS&T, EASST, ESA)	
<b>Special sessions at international conferences</b>	At least 2 sessions run in conjunction with major events	
<b>Access to online educational materials</b>	Contributions to at least 3 webinars on ON-MERRIT themes; pro-active contributions to existing educational materials / platforms (e.g., Open Science MOOC, FOSTER)	

<b>Outreach to policy and decision makers informing about project activities, outcomes, successes, societal impact</b>	1 outreach item (briefing memo/blog post/news item in relevant venue) towards the end of the project informing scientific communities and networks; 1 outreach item informing funding agencies and donors (e.g. project officers, unit directors); 1 outreach item informing national and regional government officials (e.g. scientific advisors, officials in Ministries of Science and Technology, etc.)	
<b>Networking with RRI and Open Science initiatives</b>	Interactions with / visits to related initiatives	
<b>ON-MERRIT FAIR datasets and code archived and made available via open repositories</b>	At least 5 datasets or code objects made available with open licenses to enable re-use and reproducibility	

*Table 8 - ON-MERRIT Impact Key Performance Indicators*

## 5 Reflect - Adjustments

The effectiveness of ON-MERRIT's communication strategy will be reviewed by evaluating the progress and success of the KPIs twice a year within WP2. When possible, we will reach out to the project's advisory board to support the review, adjustment and refinement of communication activities. The WP leaders will also regularly address communication issues related to their work in the monthly calls. Both measures will assist ON-MERRIT in:

- Identifying key persons and initiatives, how they engage with RRI and Open Science, and what communication channels and venues they use,
- Informing ON-MERRIT's participatory processes and co-creation activities,
- Refining key messages.

Experiences made will provide a meaningful basis for adjusting and optimising communication efforts in the second and third years of the project.

## Annex 1 - Outreach activities

Type of Activity*	Main Leader**	Date*	Place (Title, Location, URL)*	Type of Audience*	Estimated Size of Audience*	Number of female attendees	Countries addressed (local, national, international)
<b>2019</b>							
Oral presentation at a scientific event	KNOW CENTER	9 November 2020	Vienna <a href="http://www.wisia.at/e/sy_mposien.html">http://www.wisia.at/e/sy_mposien.html</a>	scientists, citizen scientists, science policy makers	14	14	Austria
<b>2020</b>							
Poster presentation	KNOW CENTER	27 January 2020	Leiden <a href="https://leidenuniv.eu.quattrics.com/ife/form/SV-cl.Ssk5kXr23VEs5">https://leidenuniv.eu.quattrics.com/ife/form/SV-cl.Ssk5kXr23VEs5</a>	Swafs project managers, policy makers	50		Netherlands, EU
Oral presentation at a scientific event	KNOW CENTER	27 January 2020	Leiden <a href="https://leidenuniv.eu.quattrics.com/ife/form/SV-cl.Ssk5kXr23VEs5">https://leidenuniv.eu.quattrics.com/ife/form/SV-cl.Ssk5kXr23VEs5</a>	Swafs project managers, policy makers	50		Netherlands, EU
Distribution of Leaflets	UGOE	10 March 2020	Berlin <a href="https://www.open-scienc-conference.eu/barcamp/">https://www.open-scienc-conference.eu/barcamp/</a>		60	25	Germany, EU

## Annex 2 - Publications

To which WP/ Task/ Deliverable is publication associated to	Title	Authors	Journal/ Conference	Status	DOI
T3.1	Open Access 2007 - 2017: Country and University Level Perspective	Bikash Gyawali, Nancy Pontika, Petr Knoth	Joint Conference Digital Libraries (JC DL) conference	accepted	N/A yet