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NI4OS-Europe

National Initiatives for Open Science in Europe

Deliverable D7.2
Marketing, dissemination and sustainability plan

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Abstract: Deliverable D7.2 – Marketing, dissemination and sustainability plan – presents a comprehensive plan on how to implement a wide-ranging marketing, communication and exploitation strategy aiming at the promotion of the project and its services to all relevant stakeholders. The deliverable includes plans and guidelines on how to foster and exploit innovations and to achieve sustainability, based on the overall project strategy and objectives, as well as the expected project results.

The NI4OS-Europe Consortium consists of:

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CYI	Beneficiary	Cyprus
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IIAP NAS RA	Beneficiary	Armenia
GRENA	Beneficiary	Georgia

Document Revision History

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November 30, 2019	f	A.Karaivanova, T.Gurov, O.Prnjat	Final version with final corrections and quality control

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References

[1]   Project NI4OS-Europe-857645 - Annex I - Description of the Action

[2]   Project deliverable D7.1 "Internal and external communication platform"

[3]   Project web site, https://ni4os.eu

[4]   Project document sharing system, https://account.box.com/login

[5]   Project Agenda tool, http://events.ni4os.eu/

[6]   Turning FAIR into Reality, EU 2018, ISBN 978-92-79-96547-0, doi:10.2777/54599, https://ec.europa.eu/info/sites/info/files/turning_fair_into_reality_1.pdf

[7]   Zenodo repository, https://zenodo.org/

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List of Acronyms

CEOs	Chief Executive Officers
DI4R	Digital Infrastructure For Research
EOSC	European Open Science Cloud
EU	European Union
FAIR	Findable, Accessible, Interoperable, Reusable
IPR	Intellectual Property Rights
IT	Information Technology
OS	Open Science
RDA	Research Data Alliance
R&D	Research and Development
R&E	Research and Education
SMEs	Small and Medium Enterprises
SP	Sustainability Plan
TNC	Transnational Cooperation

Executive summary

What is the focus of this Deliverable?

The deliverable D7.2 "Marketing, dissemination and sustainability plan" presents the comprehensive marketing, dissemination and sustainability plan of the project, as well as the communication and innovation strategy. The planned activities are based on the overall project strategy and objectives, the expected project results and innovations, and the specifics of the region.

What is next in the process to deliver the NI4OS-Europe results?

The deliverable and workflow progress are described in the project Annex-I – Description of the Action [1].

What are the deliverable contents?

This deliverable starts with an introduction, presenting the general view of the project activity (WP7) "Communication, marketing, sustainability and innovation" based on the project strategic goals and objectives. The next chapter presents the dissemination and marketing aims and main target groups. Then we present our plans for marketing and dissemination activities together with guidelines for their implementation. Chapters 5 and 6 present the project innovation strategy and the project sustainability plan. The deliverable finishes with quality metrics and conclusion.

Conclusions and recommendations

The dissemination and marketing activities are an indispensable ingredient for successful implementation of the project objectives. In this deliverable we describe our plan and strategy in order to successfully reach our target audience and deliver the main project messages. This document gives a general framework for the partners to implement locally, while we define quality metrics to follow-up on the actions taken and to measure the achieved results. The project innovation strategy is presented with the aim to streamline the innovation activities of the project and to foster the capacity to innovate and to increase the impact. The dissemination and marketing plan offers enough flexibility to the partners to shape their messages to the specifics of their country, while at the same time ensuring consistency in the overall presentation of the project's unified platform.

1. Introduction

The deliverable D7.2 "Marketing, dissemination and sustainability plan" is the second deliverable in the framework of NI4OS-Europe activity (WP7) "Communication, marketing, sustainability and innovation". This project activity has to provide a platform for networking, collaboration and dissemination for the participants in the regional Open Science (OS) ecosystem. It will support a wide marketing campaign, deal with innovation management, and provide a sustainability plan. It will deliver 30 specific dissemination events in all partner countries, including one large regional dissemination event, and will coordinate project representation in the external events. Outreach will be focused on the broadest possible set of prospective providers and user communities in order to reach a critical mass in the EOSC community in the project catchment area. The activity will also outline models for sustaining the project results and platform beyond the end of the project.

The overall ambition of this activity is to stimulate the Open Science take-up and support the establishment of national OS initiatives in all partner countries through a broad range of dissemination, marketing, and outreach communication activities. The activity will strengthen the international and national human networks, foster the culture of cooperation, and liaise with other EOSC-related projects and prospective partners beyond the R&E environment.

Together with the dissemination and marketing plan, we present in this deliverable the project innovation strategy. It has been developed in order to streamline the whole process of creating, developing and exploiting scientific results and innovations within the project. The innovation strategy is based on analysis of the key strategic strengths of the project consortium and the needs it is addressing, and is closely intertwined with our marketing strategy. It builds upon a realistic assessment of our position within the landscape of European Open Science Cloud, our current and potential users and the expected developments in information technology.

We point out that strong dissemination, marketing and innovation in our case are necessary because of the defined goals of the project, the challenges that we are facing, and are also part of the mission of the institutions that form our consortium.

Because of the relatively short time period of the project the goals that we set and the actions that we plan aim to achieve tangible results mostly within short and medium time-frame. In this sense, the sustainability plan is very important in order to sustain the results and to continue further.

In the present document we outline measures and actions that will allow project developments to realize their true potential.

2. Dissemination and marketing: aims and target groups

The NI4OS-Europe dissemination and marketing plan are linked to and shaped around the exploitation goals of the project and the liaison and network strategy. All dissemination actions are developed and organized around the needs of the identified stakeholders and the planned project results.

NI4OS-Europe structures dissemination tasks in two distinct directions. The project should disseminate the availability and quality of the regional infrastructures, data, resources and services, stressing the success stories and potential of the EOSC services, to the different regional stakeholder groups. On the other hand, the project should aim at enhancing international collaboration with other EOSC related projects and service providers with the primary aim to leverage developments in the European Open Science landscape.

The dissemination plan of NI4OS-Europe focuses on organizing events and developing and distributing dissemination materials, which address the primary project mission of changing the regional open science landscape.

The major dissemination and exploitation aims of the NI4OS-Europe project are:

- A1. Promoting the widespread use of the NI4OS-Europe services and creating incentives to attract new services and users to EOSC.
- A2. Performing science communication activities with a focus on the partner countries, to increase visibility of all EOSC-related developments within scientific, academic and technical circles, policy-makers, as well as the widest possible audience, industry and SMEs.
- A3. Increasing interactions and delivering support for better coordination with key stakeholders in the EOSC governance.
- A4. Creating opportunities for collaboration and alignment with ongoing EOSC-related or e-Infrastructure initiatives and projects and major players in the Open Science/FAIR data scenery.
- A5. Participating to and shaping scientific outreach activities on research issues related to EOSC, FAIR principles and Open Science.
- A6. Supporting awareness raising and the engagement of the communities.
- A7. Supporting sustainability and visibility of the results even after the projects lifetime, particularly through the creation and the establishment of the National OSC initiatives.
- A8. Creating a strong and recognizable NI4OS-Europe brand, identity and key messages to be used on all dissemination material and generating positive media coverage for the project at a local, national, regional, European and global levels.

These aims logically entail the target audiences and areas to make an impact. As the main objectives of the project are to support the development and inclusion of the national data initiatives in the EOSC governance, to engage data and service providers, and to spread the EOSC and FAIR principles in national and regional communities, it is important that the stakeholders of the project correlate to the target audiences of the EOSC initiative.

Within the EOSCpilot project (*Shaping the European Open Science Cloud* https://eoscpilot.eu/sites/default/files/booklet_november2017_web-1_22122017.pdf and the *Turning FAIR into reality* https://ec.europa.eu/info/sites/info/files/turning_fair_into_reality_1.pdf reports) the important stakeholder groups for the EOSC have already been identified. These reports provide an important basis for classifying communities within this regional EOSC-related initiative. In the next table we list the identified main target groups and subgroups and the related project actions that require WP7 support to increase their impact.
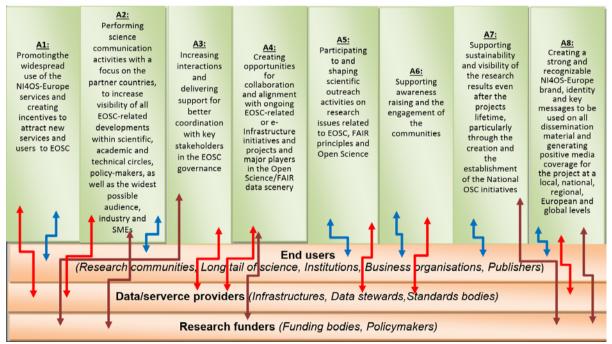
Main target groups	Specific subgroups	Description	Actions and activities
End users	Research communities	Practitioners from all research fields	Awareness raising, open call support
	Long tail of science	Individuals and research teams collecting data for specific projects, Citizen scientists	
	Institutions	Universities and research performing organizations	
	Business organisations	For-profit organisations that wish to exploit services and data for commercial purposes	
	Publishers	Not-for-profit and commercial, Open Access and paywall publishers of research papers and data	
Data and service providers	Infrastructures	Domain repositories, research infrastructures, e-infrastructures, institutional, community and commercial tools and services	Supporting EOSC service uptakes supporting integration of repositories, helpdesk support
	Data stewards	Support staff from research communities and research libraries, and those managing data repositories	
	Standards bodies	Formal organisations and consortia coordinating data standards and governing procedures relevant to FAIR, e.g. repository certification, curriculum accreditation (e.g. W3C, NIST)	

Research funders	Funding bodies	European Commission, national research funders, foundations, and other funders of research activity	Providing policies and guidelines related to Open Science, developing programs, identifying incentives mechanisms
	Policymakers	Governments, international entities, research funders, institutions, publishers and others defining data policy	

Table 1: Communities to be targeted

The expertise of the project consortium partners ensures that NI4OS-Europe has an extensive understanding of the relevant stakeholders in target countries and beyond, which will be further enhanced through the outreach activities during the project. The distinction among different stakeholders' needs, interests and concerns, helps us to plan adequate activities and actions.

Since each aim naturally affects different target groups, a mapping is presented on Figure 1 to outline which target groups are the most relevant for which dissemination and marketing aim.

Figure 1: Mapping the dissemination aims and target groups

3. Dissemination activities

This chapter describes the planned dissemination activities and dissemination tools within the NI4OS-Europe project.

3.1.   NI4OS-Europe dissemination events

NI4OS-Europe plans to communicate all relevant information about the project objectives, activities, events, generic and thematic services, repositories and data sets and the EOSC platform in general to the target groups. A set of focused dissemination events will be held in order to raise awareness about the project and the National Open Science Initiatives to the research communities but also to policy-makers, industry and society at large. In this context, actions will be taken to organize dedicated events and participate in suitably-chosen high-profile local and international events and conferences. For each type of events guidelines are provided to maximize the impact. NI4OS-Europe divides the dissemination events in the following categories.

3.1.1.   NI4OS-Europe organized events

- 1 large regional dissemination event – dedicated and organized by the project and targeted to be collocated with a major external international event for a bigger impact. The place and time will be chosen in order to achieve maximum visibility. The conference will gather representatives of all target groups (see Table 1) and will present the latest achievements resulting from the collaboration of project partners in the area of Open Science, the status and perspectives of the National OSC Initiatives in the partner countries, the portfolio of services/repositories contributed to the European Open Science Cloud, as well as the most important developments with regards to policies and governance.
- 30 country-level disseminations are envisaged – 2 national dissemination events will be organized in each of the 15 partners' countries to ensure engagement of the local communities (see Table 2 for the planned events). Each partner will choose the most appropriate form and time slot of the event. Each national dissemination event shall be at least half a day long and its agenda must be given in the project Agenda system [5]. Preference shall be given to present the National Open Science Initiative and to disseminate the potential of EOSC platform. The benefits of open data, the FAIR principles and the synergy between nationally-supported and European-level services can be also presented. It is of paramount importance to attract a representative sample of the different target groups – research communities, research funders and policymakers, industry representatives. Sufficient media presence should be ensured to disseminate the most important points to a larger audience. It is expected that these events will be accompanied with heightened activity in the social media. At the end of the event the responsible organizer fills a report and sends it to the WP7 leader. The report should include feedback from the participants.

№	Project Month	Organizer	Country	Framework
1	M06	01-GRNET/02-ATHENA	EL	National
2	M34	01-GRNET/02-ATHENA		National
3	M14	04-UCY	CY	National
4	M26	04-UCY		National
5	M10	05-IICT	BG	National
6	M26	05-IICT		National
7	M8	06-SRCE	HR	National / collocated with conference SRCE DEI 2020
8	M25	07-RBI		National/ collocated with Conference PUBMET2021
9	M16	08-NIIFI-KIFU	HU	National
10	M24	09-UD		Regional
11	M33	08-NIIFI-KIFU/09-UD		National
12	M14	11- UEFISCDI/10-ICI	RO	National
13	M33	11-UEFISCDI/10- ICI		National
14	M03 14-15.11.2019	13-UMUKM/12-Arnes	SI	National/ collocated with the Conference "Open Research Data in Slovenia", Maribor
15	M21	12-Arnes/13-UMUKM		National
16	M15	15-RCUB-UOB/14-IPB	RS	National
17	M26	15-RCUB-UOB/14-IPB		National
18	M18	16-RASH(AAN)	AL	National
19	M35	16-RASH(AAN)		National
20	M9	17-UniBL	BA	National

21	M21	17-UniBL		National
22	M08	18-UKIM	MK	National
23	M20	18-UKIM		National
24	M6	19-UOM	ME	National
25	M25	19-UOM		National
26	M14	20-RENAM	MD	National
27	M31	20-RENAM		National
28	M12	21-IIAP		National
29	M25	21-IIAP	AM	National co-located with CSIT'2021 conference
30	M14	22-GRENA	GE	National
31	M30	22-GRENA		National

Table 2: Tentative plan of the dissemination events

The following procedure is suggested for the national dissemination events.

Once a national dissemination event environment is set (organizing committee, description, program, lecturers confirmed, date and place fixed, announcement sent, etc.), the following project-specific actions should be taken:

1) At least 45 days before the event:
   a. Send a message to WP7 leader to include the event in the project calendar, to post announcement in the project web site (section "News").
   b. Send a message to the project communication leader and ask account to the project Agenda system.
   c. Send a message to the project communication leader to announce the event through project social media.
2) Fill in all fields in the Agenda system. Use the Agenda system for registration of the participants.
3) Upload all event presentations in the Agenda system (be sure the presentations use the project template).
4) Use project promotional materials: banner, poster, brochures, etc.
5) During the event monitor social media and interact accordingly. Post pictures from the event.
6) At the end of the event ensure that participants fill-in the event evaluation form.

7) After the event prepare a report about the event, incorporating feedback from the evaluation forms and send it to the WP7 leader. Do not forget to include the reflection of the event in the social media.

8) Prepare a short report (with pictures) for posting at the project web site. Send it to WP7 leader.

3.1.2. External events focused on liaising with the whole EOSC ecosystem

The project plans to have presentations and participate in the main EOSC-related European events. In this group of events we include EOSC symposia, Open Science conferences and fairs, concertation meetings and similar. The aim is to present the project results in front of a broader audience and to obtain constructive feed-back and collaborate with related projects. Where possible a separate workshop specifically dedicated to NI4OS-Europe shall be organized. Collaboration with the other EOSC sister projects (EOSC-Synergy, EOSC-Nordic, EOSC-Pillar, EXPANDS, FAIRsFAIR, EOSC-Secretariat) will be sought in order to achieve a synergy effect. The Dissemination and Events Task Force between these projects has already created a shared working space where projects can post future events to cross promote publication and events on project websites and social media. We will have the opportunity to invite representatives from other projects to speak or panel and also participate in the events. Other projects, for which liaising is planned, are EOSC-Hub, OpenAIRE, and domain/community specific EOSC-related projects like EPOS, ESCAPE, FAIRsFAIR, EOSC-Life, etc. The EOSC Working Groups will be also liaised with and the project will provide experts where necessary.

3.1.3. External events in partner countries with NI4OS-Europe presentation

The goal of the participation in such events will be to disseminate EOSC and FAIR principles, to explain the benefits of the EOSC services and data repositories and to start discussions with large groups of potential or current users, to increase the take-up of the National OSC Initiatives and facilitate discussions at policy as well as technical level.

3.1.4. Scientific conferences, workshops and events

Scientists benefiting from the project work will be encouraged to present at respected local conferences and all the scientific peer reviewed publications will be deposited as a machine-readable electronic copy of the published version in an OpenAIRE-compliant repository and in the Zenodo repository [7]. Where it is acceptable, suitable materials like project brochure, poster, etc. will be disseminated to the participants. It is important to disseminate the project achievements, where they have appropriate scientific value in the relevant conferences and journals, aiming for Open Access. The project will make full use of the new initiative "cOAlition S" (EC, national funding bodies, publishers), which aims to significantly accelerate the move to full and immediate Open Access to the scientific publications. NI4OS-Europe partners will take advantage of this new possibility as it becomes available, and NI4OS-Europe scientific publications shall be, thus, made available in a "gold" open access mode, where appropriate. In case partners would like to submit to a journal that requires Article Processing Charges (APCs), the option of publishing a

pre-print shall be used to ensure immediate Open Access. The option of self-archiving ("green" open access) would be also used, but only in concrete cases, if decided so by the partner(s) responsible for the publication for justified reasons.

Workshops that focus on NI4OS-Europe services and data repositories or the EOSC platform in general from point of view of either developer or user are also encouraged, depending on the focus of the corresponding conference and the envisaged impact.

However, it is important to note that the project does not have direct control over any scientific publications resulting from its work.

3.2. NI4OS-Europe dissemination tools

The project will make full use of the social media, using the established Twitter and Facebook registrations. The news with highest potential of engaging response from the target groups will be published there and if a discussion arises it will be followed-up. Regardless of that, the project will maintain Internet presence through content-rich websites.

- **NI4OS-Europe website [3]**

The project website is an essential tool for the project dissemination activities. It provides up to date information about the project, its activities and liaisons, calendar of events, as well as access to NI4OS-Europe social media accounts and a subscription option to the project news. The website is GDPR compliant.

The website structure will be gradually expanded with new categories and content, following the project progress. The current status and plans are described in detail in the Deliverable D7.1 [2].

- **NI4OS-Europe calendar**

All the information about NI4OS-Europe meetings, technical workshops, training events, dissemination events and conferences will be presented in the project calendar. It is based on three thematic calendars (dissemination events & conferences, training workshops & webinars, and NI4OS-Europe related events), which are embedded in one, single page (https://ni4os.eu/calendar).

Figure 2: NI4OS-Europe calendar of events

- **The Agenda tool [5]**

The Agenda tool (http://events.ni4os.eu/) allows to schedule and to organize events, from simple meetings to complex workshops and conferences with sessions and contributions. It is based on CDS Indico software, which is developed by CERN and available within the CERN Document Server Software Consortium. The CDS Software suite is free software, licensed under GNU General Public License (GPL) and is actively maintained. The NI4OS-Europe Agenda is provided as a category of the Indico installation hosted by GRNET. The following event categories have been set up in the Agenda tool:

- o Meetings
- o Conferences | Dissemination events
- o Training workshops | Webinars

Appropriate parts of the information will be publicly visible to leverage the usability of the CDS Indico platform.

- **Social media presence**

Twitter: @NI4OS_eu

The NI4OS-Europe twitter account has been active since the beginning of the project. Members of the project partnership have been assigned a role as NI4OS-Europe twitter ambassadors, for promoting project updates and relative to the community tweets, in cooperation with the social media administrators. The main hashtags promoted via the project account are: #NI4OS_eu, #NI4OS, #EOSC, #OpenScience.

Figure 3: NI4OS-Europe twitter account

Facebook: @NI4OS

The project Facebook account has been set up to support further the project communication and marketing activities, and maximize the project outreach. The account follows the style of the project website to reflect effectively NI4OS-Europe brand identity. The main hashtags promoted via the project account are: #NI4OS_eu, #NI4OS, #EOSC, #OpenScience.

Figure 4: NI4OS-Europe on Facebook

- **Document repository system [4]**

NI4OS-Europe BOX (https://account.box.com/login) is a repository that enables the secure storage and sharing of folders and files, facilitating communication and collaboration among the members of the project consortium.

The repository stores the guidelines for organization of dissemination and marketing events, reports from events, brochures and other materials. We will keep here also the list of services to be marketed and this list will be updated regularly.

4. Marketing activities

4.1. Communication strategy

The NI4OS-Europe marketing aims to communicate the project's offerings, results and potential as well as support the National Open Science Initiatives in their outreach activities. In order to maximize the impact of these activities a plan has been developed and clear guidelines and responsibilities have been defined.

Based on the envisaged service portfolio of the project, strategy and actions to market them to the corresponding target audiences shall be presented.

The partners are expected to follow the communication guidelines and good practices presented here. In the course of the project partners' experiences will be shared through the internal communication platform and discussed in order to improve and enrich those guidelines.

One of the main tools for marketing the project achievements is the promotional package which comprises of the project brochure, presentation (translated to consortium languages as necessary). The project shall also provide baseline PR material and issue regular newsletters and material documenting the progress of the activities with an accent on the most catchy achievements and new possibilities.

The project-related outreach events and the participation of project partners to external regional, national or international events and conferences shall be coordinated by the corresponding responsible person from each partner when at national level and by the work-package manager when at project level. Notification about the national events shall be sent in advance to the work-package manager and ideally they should be announced through the project's Twitter and Facebook accounts.

We present specific communication guidelines and workflows for several types of outreach.

NI4OS-Europe impact branding and communication material, channels

The project logo has been developed. It should be present in all project related presentations, materials, posters and communications.

The key messages of the project are created to target different stakeholder's groups (see Table 1). Potential messages are: "*EOSC is important to research communities/libraries and easy to use*"; "*EOSC is open for use by SMEs*"; "*A strong national effort to support the National OSC Initiatives will benefit academia, research communities, industry and society at large*".

The project moto will be decided among several proposals after considering the results of the landscape analysis. Partners will be expected to make use of it in their media presence (TV, radio, newspaper interviews, round-table discussions, etc.).

The project has developed a presentation template which shall be used in all presentations which are about the project, project services, repositories, etc., as well as in scientific presentations that are using EOSC substantially as part of the research.

The project has determined that the presence in Twitter and Facebook will provide the most impact and responsible person has been identified for them.

All partners are encouraged to increase the following of these accounts by mentioning them at their own websites, retweeting the tweets that are most relevant for their own followers, using the specially selected hashtags #NI4OS_eu, #EOSC. #OpenScience.

The same hashtags should be prominently displayed on videos that are produced by partners or the partners have control over the content.

The old media should not be overlooked since some partners have experience in attracting interest from mainstream TV channels. Since such appearances are usually very short it is important to mention the project, EOSC, FAIR principles, and/or one of the key messages, increasing the awareness of the general public.

Flyers, posters and digital project brochures and newsletters should follow the general practice of displaying project logo, name, using project colors, etc.

Each partner should try and distribute the project newsletters as wide as possible and handle follow-up questions and discussions.

NI4OS-Europe campaigns

Several types of campaigns will be undertaken. The social media campaigns will be favored when important project milestones are reached or high-profile project events are organized.

Outreach to general press and media will be centered on success stories. Press releases shall be prepared promoting project outcomes as well.

Brief memos will be provided for policymakers and other stakeholders potentially funding research activities.

These campaigns should be coordinated at national level in order to achieve maximum impact, amplifying the message.

NI4OS-Europe scientific outreach

Publication of related scientific papers in journals or conferences and preparation of articles in general science communication and publication outlets are also foreseen by the users using the project results, although these are not under direct project control.

The communication of the scientific results and outcomes of the NI4OS-Europe project are an important aim of marketing. Although the scientific publications are not the main goal

of this project, it is important to leverage participation in conferences and scientific publications for outlining the importance of the project and the benefits of EOSC.

As responsible persons from the partner teams gather information about such publications, they are expected to underline marketable results – scientific or technological - and forward this information to the work package leader, who shall present them periodically at project meetings.

NI4OS-Europe community engagement

Special sessions dedicated only to NI4OS-Europe or jointly organized by the other initiatives are appropriate for events otherwise organized by the pan-European projects and initiatives, like EOSC-Secretariat, OpenAIRE, RDA, GO-FAIR, DI4R, TNC, OSFair. The work package leader should prioritize the participation in these events.

In order to structure the relationship between NI4OS-Europe and the research communities it is important to organize special sessions and workshops at scientific conferences promoting the benefits of using EOSC services, data repositories, etc., focusing on success stories with large scientific impact or innovative approaches and developments with participation of young scientists. It is natural for each country to select promoters (champions) of the EOSC and NI4OS-Europe in particular from each scientific field with sufficient/critical mass. These people should not be technical persons, but rather established, respected scientists with high profile.

NI4OS-Europe business outreach

The most appropriate target for marketing efforts in the business community are research-intensive SMEs, by which we mean not only SMEs that actually do some kind of research but also those that "consume'' research.

Each partner should identify target SMEs of this type and proceed to organize meetings with their Business Units and R&D departments, as well as CEOs when appropriate. It is also advisable to participate in informal gatherings (meet-ups) which are regularly organized and promote the NI4OS-Europe project as a flagship project, part of the overall marketing strategy of the respective partner. Frequently such kinds of clusters/groups meet as often as once a month and it is advisable to discuss and agree on a presentation, focused at the particular field and how it would benefit from some of the EOSC services. Project materials should also be distributed at such events.

4.2. Promotional package and material documenting the progress of the activities

NI4OS-Europe promotional package is created to document project progress and activities. The promotional package contains NI4OS-Europe presentation, poster, and brochure. They are prepared based on a common graphic style that reflects the brand's

effective visual identity. The main NI4OS-Europe presentation should provide detailed information on the background to the project, objectives, methodological approach, resources and expected results. The full description of the promotional package will be given in D7.3 and will be available in M04.

4.3. Plan to implement marketing activities

NI4OS-Europe team is carrying out a set of activities aimed towards the fulfilment of the dissemination tasks described in section 3 "Dissemination activities" based on the core components of the project communication infrastructure (Deliverable: D7.1, [2]) and on the promotional package, detailed description in D7.3 "Promotional package", which will be available in 4th project month.

This chapter outlines the plan for complementary actions that improves the existing dissemination plan and bring it to the next level of proactive marketing, making the services/repositories offered by NI4OS-European more attractive to the end-users (as research communities, long tail of science, institutions, publishers) and to the data/service providers (infrastructures, data stewards, standards bodies).

The marketing activities will also reach out to research funders and policymakers, on one hand, and on the other hand, to end-users coming from industry, in particular, research-intensive SMEs, start-up companies, citizens, the general public, etc.

These target groups have been identified and surveyed through the NI4OS-Europe landscaping survey (which is in its final stages of data collection), which was helpful to determine their current level of engagement with EOSC and their expectations. The marketing activities are designed to address every group with appropriate actions in order to increase and deepen their engagement.

Since the target scope of the marketing activities consists of several target groups, it is important to work towards achieving several complementary goals, specifically designed to address the corresponding target groups. The landscaping survey reveal significant disparities between the countries, which motivates each partner to use their creativity in taking into the country specificity. We present general guidelines for interacting with the target groups:

- o Offer consultancy to *researchers* in Europe and beyond, *academic teachers*, *project managers*, *librarians*, and *trainers*, who want to be updated on the state-of-the-art services offered via EOSC, with regards to how to use them and further guidance on FAIR principles and Open Science practices.
- o Achieve high profile of the NI4OS-Europe project in *society* in general through TV and radio interviews by stressing the benefits of EOSC for scientists, working on pressing societal problems like climate change, personalized medicine, etc.
- o Engage with *prospective providers* who might be interested in the advantages of service provisioning within EOSC and the adoption of FAIR principles, the legal

aspects of ORDM interoperability and federation issues as well as the deployment of standards in their services shall be discussed.

o Promote the available services and repositories and the benefits of EOSC in general to data stewards from research communities and research libraries, to entice them to integrate their data repositories or make use of the capabilities of EOSC for their use cases.

o Attract *IT solutions providers* and *new tech startups* developing software products, tools & apps for Open Science to use or develop for EOSC with the help of NI4OS-Europe. Provide them with technical information about state-of-the-art services and current needs of the research community, discuss issues related to on-boarding of their prospective services and interest in standardisation of service offerings. The advantages of the NI4OS-Europe service portfolio and repositories should be presented.

o Raise awareness of marketable achievements of the project at appropriate industry organized events. Follow the established paths fo starting collaborative projects with *industrial partners* where appropriate. These actions should take into account the level of development of the startup and innovation ecosystems in the respective countries.

o Establish liaison with *National and EU level-policymakers* who are naturally interested in NI4OS-Europe results for the setting up of the national OSC initiatives and their Research and Innovation policies in general. In particular national representatives at the various EOSC bodies should be made fully aware of the NI4OS-Europe efforts and results.

List of actions and steps for the implementation of marketing strategy targeting different stakeholder's groups as in Figure 1, is given in the next table.

Main Actions	How to implement	Responsible partners
1. Marketing during national dissemination events	• Invite relevant people, do the proper announcement, prepare the agenda including presentations of services, repositories, best practices, etc.	All partners
2. Marketing during the regional dissemination event	• Invite relevant people, do the proper announcement, prepare the agenda including presentations of services, repositories, best practices, etc.	UD, All partners
3. Investigate the possibility to collect new thematic services/repositories	• Identify and contact prospective providers who might be interested in the advantages of service provisioning within EOSC on national level • Support these providers who decide to apply.	All partners
4. Create a concise and effective brochure with all NI4OS-Europe services/repositories clearly listed and	• Select these NI4OS-Europe services/repositories that were chosen in WP5 for EOSC on-boarding • Prepare clear descriptions of these services/repositories and instructions	GRNET, ATHENA, UD, Partners having services/repo

emphases on these that are on-boarding in EOSC	about how to use them for end-users and what are their advantages • If necessary, the brochures can be translated in local languages	sitories for on-boarding
5. Publish a popular article about NI4OS-Europe results in a magazine or journal related to OSC	• Create co-authors team from project consortium depending on NI4OS-Europe results • Distribute the work among co-authors and prepare the paper • Submit article for publication with Open Access	Partners lead WPs
6. Participation with NI4OS-Europe presentation in relevant national events	• Select the relevant national events and report them in the project calendar • Use project presentation and update it depending on the audience	All partners
7. Interviews with local policymakers' national governments (published in e-newspapers or disseminate them in social media channels.	• Invite suitable policymakers and ensure participation • Prepare in advance questions which are connected with EOSC, FAIR data, data reuse & ORDM practices, etc. • Make a recording in order to disseminate it in social media channels or newspapers	All partners propose, PMB approves.
8. Organisation of special sessions or workshops in conferences – local or EOSC-related events (e.g. organized by OpenAIRE, RDA, GO-FAIR, DI4R, TNC, OSFair)	• Prepare and publish in the project calendar the OSC conferences and events on European level • Investigate possibility to organize the special session or workshop (including with sister projects) • Promote the event (special session) to NI4OS-Europe webpage (as hot news) • Publish and monitor social media feed • Prepare report and post to project web site	All partners, PMB approves
9. Demonstrations of the NI4OS-Europe recommendations at events focused at funders and policy makers	• Select the suitable events on national level • Prepare a presentation (if needed) focusing on NI4OS-Europe recommendations, best practices, success story or distribute project materials • Prepare report and post to project web site	All partners
10. Organize targeted meetings with Business Units and R&D departments of research-intensive SMEs	• Organize f2f meeting with SMEs, chamber representatives of branch organizations and clusters • Demonstrate NI4OS-Europe services/repositories on-boarding and demonstrate success story which can benefit the end-users – industry, SMEs	All partners

	• Explore and specify other possibilities of reaching out to SMEs and industry to promote the FAIR principles • Prepare report and post to project web site	

Table 3: NI4OS-Europe marketing plan

5. Project innovation strategy

NI4OS-Europe innovation strategy is the set of actions introduced early in the project to guide and manage contributions to creatively add to the project's services development and marketing. Innovation strategy is essential to creating a solid sustainability plan since it can be the building stone for gaining competitive advantages. This strategy should be aligned with the overall EOSC innovation strategy. Thus, our main strategy will be to keep track of all truly innovative project developments, react to project internal and external innovation opportunities and assess and react to potential market opportunities. Our approach will be two-dimensional addressing national needs in one dimension and domain-specific needs on the other dimension both relevant to our target audiences. On the national level, the role of national Open Science Cloud (OSC) initiatives is essential for the regional innovation support.

A key part in the strategy will be the regional landscaping survey that takes place during the first months of the project's lifetime, to capture the current regional needs and requirements, how are they addressed and what are the gaps between them and the current local offerings and capacity. Another key element of the NI4OS-Europe innovation strategy will be the close collaboration to other INFRAEOSC-05b projects. This will offer insights from other regional and collaborative innovative efforts in Europe. In addition, planned liaising with other European and international initiatives will further increase our innovation tracking reach and therefore our surface to potentially react on. Our strategy will be further supported by embracing open innovation and collaboration within specialized groups of interest and regional Open Science key players, taking advantage of specific project activities such as national events and workshops where collaborative creative thinking usually flourishes.

All identified innovations within the project's reach will be recorded in a catalog that will be updated throughout NI4OS-Europe duration. Through this list we will be able to keep track of the innovation progress in relation to competition, position and value the current innovations according to market twice per year. This will allow us to maintain a relative innovation status snapshot of the project, not in numbers, but in terms of thematic areas, target audience and needs answered, comparing/matching activities, related technologies, services and tools. This catalog will also be a valuable tool for our sustainability plan, providing indication about our strengths and weaknesses as well as potential grounds to explore and take advantage of.

Proper support for innovation requires an IPR management plan alongside the innovation strategy to protect the potential competitive advantages gained at the project level while optimally allocating intellectual property rights among the various collaborating parties. This part of the strategy is particularly important and demanding as it focuses on patenting on specific regions and industries. NI4OS-Europe will adopt best practices on IPR management in line with EOSC related policies.

Our strong association to the EOSC federating core means that NI4OS-Europe gets inherited strengths and weaknesses affecting many of our activities. The offer and use of services through the EOSC are still at an experimental stage and definition of the EOSC federating core - in particular definition of its Shared Resources component – is a recent

and ongoing activity, therefore out of necessity, models to support integration of services with EOSC are also still under definition. This directly affects NI4OS-Europe innovation strategy as there is no clear path to where these support models will head, thus guiding related innovation where it is most needed. Moreover, it is expected that EOSC service providers will engage with the EOSC to differing degrees depending on the extent to which they wish or need to integrate their services with those of the EOSC – that is, the EOSC can act to varying degrees as a federator of existing systems. This poses another vague point, mainly affecting IPR management and planning of out innovation strategy. These great variations in the service providers' engagement level to EOSC massively increases complexity in IPR management, introducing technical obstacles, suppressing the potential of our innovation strategy.

In a nutshell, NI4OS-Europe will manage the knowledge and results so that we create business value in all aspects of our work. The following Table 4 outlines the NI4OS-Europe innovation activities, as well as the specific actions needed to address them and the leading partners.

Activity	How to address it	Responsible partner(s)
1. Establish project innovation register to keep track of the innovations produced as a result of all project activities.	• Set up the innovation register in the NI4OS-Europe document repository system (Box) and share it with all partners • Regular updates by all partners sharing their activities	UD, ATHENA, All partners
2. Align with EOSC innovation strategy	• Stay up to date with ongoing EOSC updates and sharing them within the consortium via the NI4OS-Europe document repository system (Box) • Join forces with other INFRAEOSC-05b projects • Liaise with international and EU-level key players	ATHENA, GRNET, All
3. Embrace open innovation and collaboration with target audiences	• Co-develop with regional service providers interested in the evolution and sustainability of their services through EOSC • Execute demonstrators, involving real user communities to test the first set of integrated services.	All partners

	• Involve scientists with potential for innovations in the project work • Actively engage repository managers and scientific communities through workshops and training events to co-design FAIR certification tools • Work together with national policymakers and funders to ensure inclusiveness on the European level	
3. Discover additional innovation opportunities	• Demonstrators and engagement with the communities to discover hidden innovation	UKIM, IPB, GRNET, CYI, All
4. Work with industry & SMEs	• Establish connection with local IT providers and new tech startups to discuss possible joint work	All partners
5. Follow up developments in open tools for FAIR data	• Observe developments in open tools and regularly notify partners if interesting new trends appear	ATHENA, UOB, RBI, SRCE, UCY, UD, UMUKM

Table 4: Innovation activities

6. Sustainability plan

The sustainability plan reexamines the main operational principles of the project in order to find the solutions for sustainable, long-term impact of our results.

<u>What:</u> provide strategic, legal and financing recommendations for sustainable operations of regional data services and initiatives within the EOSC federation.
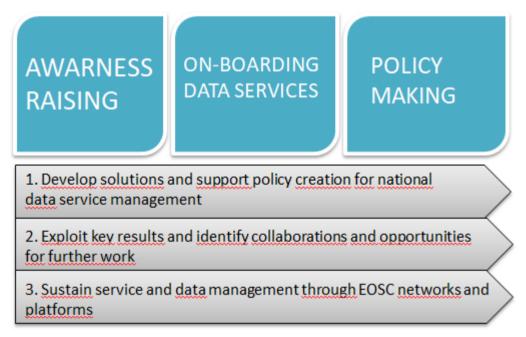
<u>Why:</u> A clear understanding of key aspects (strategic, legal, financial) of including the national data services initiatives within the EOSC federation.

<u>How:</u>

- Mapping out main stakeholders and their roles in the on-boarding process.
- Examining options for legal, financial, operational framework for the process.
- Analyzing the impact and sustainability of proposed structures.

Building blocks

The sustainability plan (SP) is based on the overall objectives of the project: (1) to spread and train the EOSC and FAIR principles (awareness raising), (2) to support the development and inclusion of the national data related services and initiatives (on-boarding), and (3) to provide technical and policy support in the on-boarding processes (policy making).

Figure 5: NI4OS-Europe sustainability activities

NI4OS-Europe sustainability activities can be grouped into three building blocks (based on the overall objectives of the project) and three categories: Development, Exploitation and Sustainability.

The first category focuses on the Development of specific solutions in the project life cycle including support for data related policies. Applying these categories the following Development activities are planned:

- Developing stakeholder analysis and mapping of national data landscapes.
- Developing National OSC initiatives model.
- Developing business models.

The second category focuses on the Exploitation of key results to on-boarding of data services (e.g. to engage national stakeholder groups more broadly, increase access to results, ensure organize trainings). The project will look for opportunities to:

- Exploiting key results of stakeholder and landscape mapping.
- Harmonization of best practices and implementation of technical recommendations.
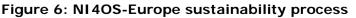- Constructing the basis for policy developments.

The third category focuses on the Sustainability of established collaborations and relationships within the national and EOSC networks. This approach connects project results and post-project progress with the ongoing activities of these channels and networks. Specific planned activities include:

- Promoting Policy Recommendations.
- Implementing rewards and incentives mechanism to sustain on-boarding and continuous service provision.
- Implementing certification schemes for free flow of data.
- Sharing project tools and methods.

Planning process

The project sustainability planning will follow a 5 step process covering the whole duration of the project life cycle.

Figure 6: NI4OS-Europe sustainability process

SP phase 1: Setup and planning for development

In this initial phase of the SP the criteria for exploitation, sustainability and development are determined. The goal here is to monitor ongoing activities, identify collaborations on sustainability platforms and identify key exploitation results. The monitoring focuses on the needs of the identified stakeholder groups, the opportunities and the solutions that are being developed.

SP phase 2: Confirmed key results

Initial findings and key results from the landscape scan survey and interviews are confirmed. A preliminary list of exploitable and sustainable activities are drafted, discussed and agreed upon by the partners: networking activities (policy support, training, and marketing), service-oriented activity focusing on on-boarding and service maintenance, and technical tool development activities focusing on data standards, processes, and certification.

SP phase 3: Confirmed target groups and beneficiaries

Outreach activities are organized to engage relevant stakeholders and possibilities for ongoing collaboration are confirmed.

Tasks in this phase include: trainings are conducted and outreach programs are organized to contact stakeholders; harmonization of operational practices and testing platform for on-boarding; marketing for innovation developments is defined.

SP phase 4: Confirmed commitments from interested partners to contribute to EOSC development processes

As the key results and findings are consolidated and the target groups are confirmed, consortium partners commit to innovations and exploitation of findings for further development to achieve concrete results. Project activities (awareness-raising, on-boarding and policy making) will continue on national levels and the collaboration and relationships established with EOSC channels and networks will be sustained.

SP phase 5: Finalize NI4OS-Europe deployment, exploitation, sustainability scenarios and plans

Results of on-boarding and awareness raising activities are reported. Policy Recommendations are determined and disseminated to policy makers, institution decision makers and the related EOSC projects. Risks and next steps are discussed.

7. Impact measurement

The impact of the dissemination and marketing activities is measured by the regular tools for project management (activity and partner reports), with careful consideration for the KPIs defined in the DoA [1]. In this section we outline those indicators that are most relevant for the dissemination and marketing, divided into sections according to the corresponding objective.

1. Developing project identity

The project is committed to achieve the following metrics:

- 1 project logo (various resolutions).
- 1 project motto in all key languages.
- 2-5 hashtags to use when disseminating through social media.
- 1 presentation and 1 document template.

Information about these metrics will be available in D7.1 and D7.3.

2. Setup communication channels

The detailed description of the project website is available in D7.1. Since it is the main communication tool for the project, its impact shall be regularly monitored, using industry standard tools.

The social media accounts for the project in Twitter and Facebook are operational. The following metrics are defined:

- 1 project web site.
- Project social accounts: Twitter, Facebook (more than 100 followers).
- Impact of website – number of visits, number of downloads.

Other consequential metrics for the social accounts like number of postings/tweets, number of retweets and likes will also be monitored for each platform.

3. Produce dissemination materials

Due to the wide scope of the project and the need for materials suitable for different target groups, the following metrics are suggested:

- Maximum 8 types of project posters – 2 generic posters and several technical-specific posters as the need arises.
- Maximum 5 types of digital project flyers/brochures.
- 2 large banners and 4 web banners.
- More than 1,000 project core brochures.

4. Organize national/regional dissemination events

The organization of events should follow the plans outlined in section 4 and the following metrics are suggested:

- 30 national dissemination events with a total of 600 persons targeted.
- 1 regional event with at least 200 participants.
- The quality/usefulness of the events measured by feedback from the participants.

The collection of feedback is a responsibility of the organizers.

5. Organize social media campaigns and campaigns for outreach to general press and media

Metrics:

- 2 social media campaigns per year.
- 1 social media campaign for each important milestone (e.g. open call) or events (e.g. major conference).
- 2 press releases per year on project stories and outcomes.
- 2 interviews with local community members per year explaining FAIR data, data reuse & ORDM practices (to disseminate through various channels).
- More than 10 news items per year on specialised project topics (through existing channels and newsletters.
- 1 briefing memo per year informing scientific communities.
- 1 briefing memo per year informing funding agencies and donors (e.g. project officers, unit directors, regional authorities).
- 1 briefing memo for national/regional government officials (scientific advisors, officials in Ministries of Science and Technology, etc.).

6. Publication of papers in journals or conferences relevant to EOSC

Metrics:

- More than 3 publications to journals relevant to research governance.
- More than 5 publication to journals related to Computer Science and Information Science topics.
- More than 3 publications in OS conferences.
- 2 articles per year at related blogs and websites.

The project is not focused on scientific publications, but it is expected that the project partners will exceed these goals with quality publications. The links to the publications shall be made available through the project website.

7. Organise meetings with industry and SMEs

With regards to collaboration with industry and SMEs, the following metrics are defined:

- At least 3 meetings during project lifetime.
- At least at 3 related events during project lifetime.

Due to the large disparity in country development and industry specialisation, a variety of forms for industry outreach is to be expected. Feedback from these events shall be input in the project periodic reports to foster discussion and adoption of the most successful forms.

During the project lifetime, the progress in achieving these metrics will be regularly monitored by the WP7 leader through the 3M reports and will be reported and discussed at the regular AMB meetings. In case there is a discrepancy from the plans or the progress is far from linear behavior, appropriate actions will be taken.

8. Conclusions

The dissemination and marketing activities are of paramount importance for attaining the project objectives and that is why careful planning has been carried out and guidelines have been provided to describe the specific steps related to the project. In this deliverable we describe our plans for the various sub-activities and the corresponding strategies in order to successfully reach our target audience and deliver the key project messages.

A general framework for the partners has been provided, so that they can tailor their messaging and actions locally, taking into account national specifics and the results from the landscaping survey analysis. A large number of KPIs have been defined, together with procedure for their monitoring and taking corrective actions, to ensure that the dissemination and marketing aims are achieved and that all partners take part in the effort.

Central points of contact are defined not only for the social accounts, but also for the dissemination and marketing tools and for general coordination, in order to achieve synergy and support non-trivial new collaborations. In this way, for example, the project social media presence is tasked to support partners' efforts and amplify the project messages.

The project innovation strategy is presented with the main goal to foster the innovation activities of the project, by providing coordination and technical support. Because of the limited timeframe of the project the planned activities aim to obtain maximum benefit from the project's innovations. A sustainability plan has been proposed. After more project milestones are achieved and feedback has been gathered from the stakeholders, the plans will be updated accordingly.

Although the project's funding for dissemination is limited, the partners have excellent position within their countries and will be able to achieve high impact while reaching the diverse target audiences. The combined use of traditional and social media is encouraged and supported. The planned activities include actions and measures that aim to exploit the collaboration and potential synergies with the sister EOSC and other projects. The overall shape of our dissemination and marketing activities is following the main principles of EOSC and aims to strengthen the science and innovation in the region in-line with the European Open Science vision, with sustainability in mind.

The project developed an initial sustainability plan, based on several logical building blocks and series of actions, which are organized into 5 phases. At the end of the project the sustainability report will assess the progress of the implementation and outline the further steps to achieve prominent presence of the region in the EOSC landscape and to deliver the benefits of Open Science to the region's scientists and the society at large.