



COESO

connecting research and society

COLLABORATIVE ENGAGEMENT ON SOCIETAL ISSUES

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

09.07.2021

Draft version



This deliverable is licenced under
a Creative Commons Attribution 4.0 International Licence.



COESO project has received funding from the European Union's Horizon 2020
research and innovation programme under grant agreement No 101006325

The content of this publication is the sole responsibility of the COESO consortium and can in no way be taken to reflect the views of the European Commission. The European Commission is not responsible for any use that may be made of the information it contains.

Deliverable 7.7

Plan for the Exploitation and Dissemination of Results (PEDR)

Grant Agreement number	: 101006325
Project acronym	: COESO
Project title	: Collaborative Engagement on Societal Issues
Funding Scheme	: H2020-EU.5. - SCIENCE WITH AND FOR SOCIETY
Topic	: SwafS-27-2020 - Hands-on citizen science and frugal innovation
Project's coordinator Organization	: EHESS-OpenEdition
E-mail address	: pierre.mounier@openedition.org , alessia.smaniotto@openedition.org
Website	: https://coeso.hypotheses.org
WP and tasks contributing	: WP7 Communication and Dissemination
WP leader	: Max Weber Stiftung
Task leader	: EHESS-OpenEdition
Dissemination level	: PU - Public
Due date	: 16 July 2021
Delivery date	: 09 July 2021
Authors	: Elisabeth Ernst (MWS), Alessia Smaniotto (EHESS-OpenEdition)
Reviewers	: Tiziana Lombardo (Net7), Daniel Lisbona (Ibercivis)

Contents

Introduction	4
Dissemination Plan	5
General Strategy	5
Key Performance Indicators (KPIs)	6
Assessment of the Dissemination Plan	7
Exploitation Plan	9
COESO objectives	9
Strategy	10
Exploitation levels	10
Potential exploitable assets	11
Taking advantage of the project data	11
The Data Management Plan	11
Data FAIRification	11
VERA platform sustainability	12
IPR management	13
Conclusion	14

I. Introduction

The COESO project (Collaborative Engagement on Societal Issues)¹ is a 3-year participatory research project, funded by the European Commission through a Science with and for Society grant, and supported by the OPERAS Research Infrastructure². The COESO project contributes to overcoming the obstacles that hinder the development of citizen science in the social sciences and humanities and facilitates and supports participatory research through a service-first approach. The project will develop the Virtual Ecosystem for Research Activation (VERA), a collaborative place for knowledge production and sharing, and will collaborate with research funding organizations to enhance financial support for citizen science. At the heart of the project are ten citizen science pilots, representing a variety of social sciences and arts disciplines, societal challenges and types of engagement with citizens in different European countries. The five already built-in pilots address specific societal issues: mass tourism, education and gender, resilient societies, fight against crime, societal changes and migrations. COESO serves as a meeting point between various European communities: the social sciences and humanities community, the citizen science community, as well as the open scholarly communication community. As a bridging endeavour, COESO will take stock of existing communities such as Hypotheses.org³ and EU-Citizen.Science⁴. It will moreover explore the frontiers of innovation in the social sciences and humanities' public engagement through mutual learning and transmedia writing. Furthermore, to measure the quality of collaboration between researchers and citizens, COESO will design cooperation analytics.

To ensure successful implementation, COESO has devoted a work package (WP7) for developing dissemination and communication tools and procedures as well as an exploitation plan. COESO maximizes impact through the actions described in this Plan for the Exploitation and Dissemination of Results (PEDR) and the engagement of users and stakeholders through the development of a Communication Strategy, as well as through the provision of appropriate resources allocated for achieving the planned impact.

The PEDR will be updated during the course of the project in order to efficiently and sustainably answer COESO's needs and progress, which will need to be fine tuned once the project is in a more mature stage (see more on the assessment procedure in the conclusion). The PEDR is based on: (1) the Communication and Dissemination Plan (WP7); (2) the Data Management Plan (WP1); and (3) the exploitation of results and specific deliverables.

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

² See <https://www.operas-eu.org/>

³ See <https://hypotheses.org/>

⁴ See <https://eu-citizen.science/>

II. Dissemination Plan

General Strategy

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

The dissemination plan first defines the target audiences (within and outside of the project's consortium) that COESO wishes to reach. The plan then defines different dissemination measures. This is then brought together in a target audience-dissemination measure-matrix to identify which dissemination measure is particularly suited for which audience. Finally, it gives information on the timing of the dissemination measures.

COESO's dissemination strategy targets those audiences that are interested in the results of the project instead of the project and its goals as such. The primary target group is composed of social sciences and humanities researchers and societal actors who are already involved in citizen science. This includes, for example, journalists, artists and other independent stakeholders, small and medium enterprises, and non-profit organizations. The secondary target audience is that of funding organizations for citizen science projects as well as policy makers on different levels, such as the European, national, regional or local one. The third target audience is made up of social sciences and humanities researchers and societal actors who are not yet involved in citizen science. The last target audiences are researchers from other disciplines, research organizations and universities at large, as well as service providers, such as libraries and infrastructure providers, etc. In addition, dissemination measures also target other SwafS related projects and the COESO and OPERAS consortium. All audiences for COESO's dissemination measures can fall into more than one of the categories described.

The project's results will be disseminated via the communication channels that have been identified in the COESO Communication and Dissemination Strategy. Dissemination measures include scientific publications, reports on COESO-initiated events such as conferences and workshops, reports on events that the COESO consortium participates in and presents the project at, training and guideline materials, advocacy material, as well as the project deliverables.

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

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

All dissemination measures (unless specifically stated otherwise, as e.g. in the case of some deliverables) will be public and open access and all publications and public deliverables will be uploaded to Zenodo.

For a detailed matrix describing the target groups and dissemination measures, please consult the COESO Communication and Dissemination Strategy - pp. 23-25.

In order to efficiently and effectively time the dissemination measures during the project, a calendar outlining the timing of those measures has been developed. It plans all dissemination activities according to the project's development; thus, in the beginning the dissemination material will mostly focus on what the project wants to achieve and during the course of the project, these measures will become more detailed and concrete. The timing of the dissemination measures are closely linked to the project's communication actions to ensure a broad dissemination of the various project outputs.

For a detailed table describing the planned timing of blog posts, social media series, podcasts, articles in Cafébabel, publications, reports on COESO events, training material, and guidelines, please consult the COESO Communication and Dissemination Strategy (pp. 25-26)

Key Performance Indicators (KPIs)

Success indicators are used to obtain different feedback. Key Performance Indicators (KPIs) measure the effect of dissemination strategies and they evaluate the success of communication activities. As a first step, COESO has identified KPIs for each activity and will continue to monitor and adapt them as needed in the course of the project. COESO will monitor communication-specific KPIs in the updated version of the Communication and Dissemination Strategy in a different document.

Objectives	KPI	Details
Support collaborative practices	VERA uptake	No. of projects using / enrolled in the VERA platform
Enhance financial support	Fundit uptake	No. of new profiles created on Fundit
	Citizen science adoption by funders	No. of funding program adding citizen Science as a criteria
Leverage Transmedia in Public Engagement	Transmedia adoption in pilots	No. of transmedia products from pilots
	Transmedia products impact	Cumulated audience (no. of views) by the end of the project
	Pilot's blogs on Hypotheses.org impact	Cumulated audience (no. of views) per blog per month

Engage with stakeholders from different backgrounds	Efficient inclusion of relevant stakeholders	Percentage of differentiated stakeholders
Assess collaboration	Assessment tools production	No. of cooperation analytics
	Assessment tools uptake	Evaluation of relevance by pilots
Experimenting new methodologies	Collaborative tools uptake	No. of projects using collaborative tools during research
Overall: overcome obstacles	COESO project assessment	Evaluation of achievement by Advisory Board

Assessment of the Dissemination Plan

The progress of the dissemination activities are monitored constantly by making use of analytics, in particular of the project website and the social media, and are adjusted accordingly. In addition, regular evaluation meetings of the project coordination team (the project coordination team includes the project management team and the communication team) give an opportunity to discuss the strengths and weaknesses of the dissemination process and to adapt it.

The dissemination strategy will be re-evaluated as part of the following documents and at the end of this subchapter:

- M18: Draft Report on Dissemination Activities
- M30: Final PEDR
- M36: Final Report on Dissemination Activities

A first evaluation of the dissemination activities has shown that the strategy is working and is producing good results. As of 22 June 2021, COESO has 104 Twitter followers and has received 13.9K impressions over the period of the last 3 months. This equals about 155 impressions per day. The top ten tweets that have been seen the most are about the call for members of the COESO Advisory Board, about what COESO is doing as a project, a job posting for COESO from CRIA, a blog post about citizen science in the social sciences and humanities in Germany, as well as tweets about two pilots. While the number of followers is still low, this number steadily increases. The Twitter statistics show that most of the tweets with the highest impressions are those that notify the community about a blog post on the COESO blog. The statistics for the blog paint a similar picture: Unique visitors to the blog are steadily increasing and have been 645 as of 22 June 2021. Unique views spike after the publication of a blog post and its announcement in social media. While the community manager for blogs from EHESS/OpenEdition can only be hired in September/October 2021 and pilot 1 will only start in September 2021 instead of June 2021, this doesn't affect the overall dissemination strategy. To mitigate the publication of blog posts related to this, we have adapted the timeline as outlined in the Communication and Dissemination strategy. In addition, pilots' participation (e.g. by targeting their professional networks) will actively contribute to the dissemination of the ongoing project. The active support of the Advisory Board will be also requested in order to widen the outreach network.

We have learned some lessons from the past three months and since the finalization of the Communication and Dissemination strategy:

- COESO needs to engage more with professional social networks, as e.g. LinkedIn to share content such as the call for the Advisory Board. This will be done via the OPERAS LinkedIn account.
- The COESO website, and especially its description of the work packages, are too much directed at the European Commission and don't speak well to other audiences that are not used to the EU projects' language. We will rewrite this part to make it more interesting to read for other stakeholders. We will seek to develop a new community targeting strategy and an engagement plan.
- An internal newsletter for the COESO consortium and the partner's communication officers would be useful.
- A dedicated meeting with the consortium partner's communication officers would be useful for fostering COESO's communication and dissemination strategy and for ensuring a wide participation in the actions of consortium partners.

III. Exploitation Plan

COESO is a citizen science project involving partners coming from different sectors and professional areas, with a huge diversity in the organization sizes and governance structures.

A first step for developing an appropriate exploitation plan is to identify the exploitation ambition of each partner, that is the first target for the exploitation of the project results. Exploitation ambitions may include network building, policy development, dissemination and further research, and the uptake of the VERA platform. This first draft of the exploitation plan will be updated during the project to take full account of the changes resulting from the development and conclusion of the project.

COESO objectives

COESO's overall objective is to contribute to overcoming the obstacles that hinder the development of citizen science in the social sciences and humanities and to intensify the collaborations between researchers of these disciplines and socio-economic actors (e.g. journalists, artists and other independent stakeholders, small and medium enterprises, civil society organizations, etc.).

To reach this goal, COESO is driven by the following specific objectives:

1. **Specifically support collaborative practices in social sciences and humanities citizen science projects** by developing a Virtual Ecosystem for Research Activation (VERA), that will provide a set of tools to discover potential partners - favouring partnerships between scientific establishments and citizens, to define and co-design the activities, to co-create new knowledge and solutions, and to deliver them to society. The sustainability of the VERA platform beyond the project duration is one of the main objectives of the exploitation plan.
2. **Collaborate with research funding organizations to enhance financial support** to citizen science projects in the social sciences and humanities. The results of the project actions towards funders can be exploited by funders themselves, research institutions and civil society to further enhance the science-society collaborations.
3. **Enable the experimentation on leveraging transmedia practices to engage the public** with social sciences and humanities research outputs that address societal challenges. The new methodologies applied during the project can be scaled up and exploited by external stakeholders
4. **Design “cooperation analytics” to measure the intensity of collaboration** between researchers and socio-economic actors in VERA. Those analytics will be useful to the project teams themselves, but they will also be a major contribution to funders, policymakers, research organizations and other stakeholders supporting citizen science policies.

Relevant COESO exploitable results will lead to:

- new knowledge and innovation by citizen scientists and new opportunities for the research in the European Research Area
- empowerment of local communities and policy advances
- new formats of collaborations and science communication
- quality collaborative inquiries on social topics, thus enhancing evidence-based policies

Strategy

The exploitation plan must take into account the various aspects of the COESO project, its exploitable results and the VERA platform development. The exploitation strategy will depend on identified exploitable assets. The list of exploitable assets will be refined throughout the project duration. Different exploitable assets may be exploited by different stakeholders based on the management of the IPRs as well as according to their level of involvement and interest. Moreover, the exploitation strategy of the project will follow a stepwise approach and will be based on the combination of a bouquet of activities which will span throughout the project duration. These activities may include surveys addressed to the project partners to identify:

- exploitable assets
- each partner contribution after the project end to the sustainability
- estimated role within the VERA platform
- estimated costs for the contribution after the project end
- estimated benefits
- exploitation ambitions

The exploitation activities will be mostly directed at research units, small and medium-sized companies, public institutions and funding agencies in order to secure a successful introduction and implementation of COESO's results.

Exploitation levels

COESO final exploitation plan will take into account all the relevant exploitation levels: technical, non-commercial and commercial. An analysis of the potential level of exploitation for each exploitable asset will be developed.

In order to identify the most appropriate level of exploitation, throughout the project duration a competition analysis will be developed in order to identify other relevant stakeholders within and outside Europe, developing similar services. The competition analysis will, after having identified those competitors, conduct a SWOT (strengths-weaknesses-opportunities-threats) analysis of COESO in general and VERA in particular to come up with recommendations.

Potential exploitable assets

COESO consortium has already identified some key exploitable results such as:

- project research datasets and results
- the VERA platform
- the Cooperation analytics
- the APIs developed during the project

Project research datasets and results can be exploited starting within the project duration, while the VERA platforms, the Cooperation analytics and the APIs are outcomes likely to be exploited beyond the project duration.

The long term sustainability of the VERA platform is a key part of the exploitation plan to be developed.

Taking advantage of the project data

The Data Management Plan

The Data Management Plan (DMP) is developed in Work Package 1 (WP1) within Task 1.2 and is being released in parallel with this deliverable. It includes information relating to the types of data the project generates and collects, the standards it makes use of, how data can be exploited and verified, whether there is any data that cannot be reused, and lastly, how the data will be curated and preserved.

Four main types of exploitable data can be distinguished: data collected by the Pilots, data for the implementation of the VERA platform, data collected through the VERA platform, and public results of the project, such as reports, articles, and other publications. A shared mind map of the project data is available for the consortium members, to visualize the dependencies of the dataset produced. During the COESO project life, all the partners involved will contribute to the identification of the exploitable assets within the identified exploitable datasets.

Data FAIRification

Data FAIRification is a major step towards an efficient exploitation of the project's results. As one of its major goals, the project will thus ensure Open Access to its publications and make its data as open as possible. It will also act proactively to address FAIRification challenges in all its parts by facilitating discovery, using interoperable formats and metadata, securing hosting and storage, and supporting reuse through clear methodology and appropriate licensing. This will ensure the possibility of further reuse in research, further development of the products and process provided as service.

More specifically the VERA platform development (WP3) and management will rely on the W3C standards for Open Web Platforms, comprising Semantic web recommendations. A documented data model will be established to ensure efficient interoperability with external services. Moreover, the development will use and produce open source tools and services. The addition of discovery interfaces for advanced discovery will follow the same rules and the code files will be deposited and updated on sustainable repositories. The discovery interfaces production will rely

on VERA databases and on external services such as those provided by the TRIPLE project⁷ and Fund.It database⁸. A specific set of data will be generated through the cooperation analytics assessment (see WP5) which will complete the platform with cooperation measurements. The data will be provided with a reference library on open source cooperation analytics and the configuration of the indicators will be thoroughly described. The data collected will be made interoperable with the most common formats (tab-delimited or spreadsheets).

The Pilots (see T2.7) will make use of blogs to be set up on the Hypotheses.org platform which meets the sustainability and Open Access requirements for such data.

The reports, mainly in PDF format, will be safely stored and made openly accessible in appropriate repositories, such as the zenodo.org repository. The deposit on Zenodo will enrich the record with Dublin Core metadata and a standard persistent identifier (DOI). Other outputs will include articles, videos, and transmedia material for which the DMP will provide detailed description and management provision. As a given, all reports and research outputs of this project will be released under Creative Commons Licenses CC-BY 4.0⁹ international.

Further information about the means for data FAIRfication are more specifically addressed within the Data Management Plan.

VERA platform sustainability

In order to have a sustainable platform and to be able to launch future Open Calls, COESO must develop a specific business model. Several possibilities will be studied during the two first years of the period of the project, among which the possibility to set up a “freemium” model, charging fees for premium services for specific targeted stakeholders, as well as subscription models.

As the VERA platform will constitute a core element of the OPERAS Research Infrastructure, the VERA business model will be strongly linked to the OPERAS Research Infrastructure’s business model. OPERAS is the European Research Infrastructure supporting open scholarly communication in the social sciences and humanities. The OPERAS Research Infrastructure has already defined its governance model and the scientific and technical concepts for future services, while it has also established a roadmap for its future development. OPERAS is now moving from the preparation phase towards reaching its medium to long term goal consisting of establishing the infrastructure as an European Research Infrastructure Consortium (ERIC).

The sustainability plan for the VERA platform will take into account the sustainability of the APIs and/or plugins allowing the connection and interoperability with other platforms and services (i.e. Hypotheses.org¹⁰, EU-Citizen.Science¹¹, GOTRIPLE platform¹², funding databases and other external databases).

⁷ See <https://www.gotriple.eu/>

⁸ See <https://fundit.fr/fr>

⁹ See <https://creativecommons.org/licenses/by/4.0/>

¹⁰ See <https://hypotheses.org/>

¹¹ See <https://eu-citizen.science/>

¹² See <https://www.gotriple.eu/>

IPR management

The Consortium Agreement (CA) has been signed by each Beneficiary prior to the project start, and is based on the DESCA model for Horizon 2020¹³. The CA provides clear regulations for issues related to IP Ownership, Confidential Information, Open Source issues, Standard contributions, and Access Rights to Background and Results within the project.

Apart from this general agreement, two research datasets produced during the project are likely to produce new frameworks for IP management:

- the collaboration between a research unit and a dance association, involving artistic production and exploitation
- the collaboration between a private research company and an investigative journalism association, where high security databases asking for Non Disclosure Agreements (NDA) between partners will be used.

If during the project lifespan there will emerge the need for a new IP management framework, this document will be updated accordingly.

¹³ See <https://www.desca-agreement.eu/what-is-desca/>

IV. Conclusion

The PEDR will be updated to include more details in Month 30, especially with regard to the exploitation of results.

For creating the final version, a continuous assessment of the dissemination strategy and the DMP will be also conducted. The following milestones are to be used for the final version:

- mutual learning
- workshop with funders
- alpha version of VERA
- exploitation assessment

This deliverable in itself is also an example of an exploitable asset because the COESO dissemination plan and the DMP hope to establish a model or template for future projects of the OPERAS research infrastructure. Especially the relation of these areas to the OPERAS research infrastructure can be used for future projects.