

Pathos

Open Science Impact Pathways

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Communication, Engagement and Dissemination Plan

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Table 1: Document Revision History

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Abbreviations

CWTS	Centre for Science and Technology Studies
EARMA	European Association of Research Managers and Administrators
eInfra	E-Infrastructure
EUA	European University Association
ESFRI	European Strategy Forum on Research Infrastructures
LIBER	Association of European Research Libraries
ML	Machine Learning
M	Month
NLP	Natural Language Processing
OA	Open Access
OECD	Organization for Economic Cooperation and Development
ORE	Open Research Europe
OS	Open Science
R&I	Research & Innovation
RI	Research Infrastructure
RPO	Research Performing Organisation
SC	Steering Committee
STI	Science, Technology, and Innovation Indicators
UNESCO	United Nations Educational, Scientific and Cultural Organization
WP	Work Package

Executive Summary

This document presents the strategy and tools that are used to implement the PathOS Communication, Engagement and Dissemination plan. The purpose of this plan is to design an approach that will efficiently promote the project and its results to targeted audiences and to all major stakeholders within Europe and beyond, as well as list all tools & materials that will be used to this end.

Recognising the importance of engaging with, and reaching out to, the target audience early on, this document outlines the definition of the PathOS key messages for each of the key stakeholder groups. It selects the most appropriate dissemination channels for the messages to be communicated and the key stakeholder group to be reached.

Working towards a long-term impact for the project, the engagement of the key target stakeholder groups is fostered by providing a communication platform that will document project outcomes including success stories, policy briefings, methods, tools, and data.

This plan also includes the definition of activities (e.g., responses to consultation, provision of advice by project experts, etc.) that will enforce and spread the project's messages and results and a time plan that will serve as a guide for their delivery. It presents useful dissemination tools and materials that will be developed and used for the successful outreach and engagement of key target audiences.

Finally, the Communication, Engagement and Dissemination plan is meant to serve as a living document and will be regularly updated. Regular internal progress reports on the activities planned will provide the monitoring basis and inform any updates to the plan regarding the success of project results dissemination and the engagement of the key stakeholder groups.

1. Introduction

The PathOS project is centred around the better understanding and measuring of Open Science impacts and their causal mechanisms. The main aims of the project are rooted in identifying and documenting the Open Science Impact Pathways, i.e., mapping the possible paths that establish the connection from input to output, outcome and impact including the causal mechanisms, while linking them to the existing enabling or blocking factors.

One of the main outcomes is to produce concrete recommendations for key actors within the Research and Innovation (R&I) ecosystem as to how and to what extent Open Science should be promoted in a balanced way, including what interventions are likely to be most effective.

A key component to the success of the aims and goals of the project is putting together that Communication, Engagement and Dissemination plan that guides these activities and involves all major stakeholder groups from the initial stages of the project, monitoring and evaluating their impact throughout the project lifecycle.

To this end, this document identifies the main PathOS target groups and outlines the key messages for effective outreach and develops the tools to maximise their impact and reach. Furthermore, a social media strategy is presented, and will be regularly updated (M14 and M24) to ensure the effectiveness of the PathOS messages covering all important actors.

For the coordinated publication of all project outputs and scientific publications, publication guidelines that provide clear and straightforward instructions to all authors are developed and incorporated into the plan. By doing so, it is ensured that all scientific outputs of the project will adhere to OS principles.

In summary, the primary goal of this document is to create a successful plan for the Communication, Dissemination, and Engagement of the key stakeholders involved in the PathOS project, the best materials, and tools to be used by project partners and finally activities to be organised to serve this aim. This plan is meant to serve as a living document that will be regularly updated and adapted to fit the needs of the project alongside its progression.

This plan focuses on three main components:

- Identifying the key targeted groups
- determining the best methods and tools for promotion and dissemination, and
- developing specific activities to achieve the desired outcomes.

The ultimate aim is to effectively communicate with the appropriate audience through carefully chosen channels and thoughtfully planned activities.

Finally, all communication, engagement and dissemination activities will follow and comply with the guidelines and rules as outlined by Article 17 of the Grant Agreement.

2. Mapping of key target groups

2.1. Key target groups

An effective understanding of all stakeholder groups that need to be mobilised from the beginning to ensure the success of the project is essential, as it will help co-create and inform all project outcomes. Exploring and understanding the motivations and needs of each group will help create open communication lines with each of the stakeholders and ensure their involvement and engagement throughout the project thus contributing to the success and longevity of the project results. The following groups are approached during year 1 and year 2 of the project are expected to inform the project's final results on year 3.

The key target groups identified and prioritised are the following:

- Target group 1: R&I policy makers & policy officers
- Target group 2: University/Research Performing Organisation (RPO) executives and managers
- Target group 3: Research Infrastructures managers
- Target group 4: Research Librarians/Research support staff
- Target group 5: Open Science experts/Researchers
- Target group 6: Scientometrics Meta-science R&I evaluators
- Target group 7: (Open Access) Publishers
- Target group 8: Research funders

PathOS will reach out to the aforementioned target groups early in the project to raise awareness and create a mapping of the current needs of each group. At a later stage, these groups will be asked to provide insights and feedback, as the concrete project results will be available to be validated for the communities and their respective uptake to be assessed.

3. Engagement of key target groups

3.1. Key message for each target group

In order to target effectively all key stakeholder groups, PathOS will make use of the expertise and extended networks of all project partners as well as outline the key messages and means

of engagement for each of the groups. Consequently, by defining the key messages/communication means for each of them, the effective outreach and desired dissemination of project outcomes will be achieved.

3.1.1. Target Group 1: R&I policy makers & policy officers

R&I policy makers & policy officers at the international, EU and national/regional levels will be targeted. As Open Science widens and embraces open software (such as AI), open hardware, research facilities and protocols, PathOS can support policy makers and officers in:

- Creating a better understanding on the underlying systemic structures and benefits of open science.
- Providing a training programme on OS impact pathways at different levels (institutional, national, RI), as well as on the data driven measurements of OS impact (methods, tools, data).
- Providing hands-on recommendations for adjusting, supporting, and strengthening open science in R&I policy and activities based on PathOS results.

In order to engage with this target group, PathOS will invite key stakeholders to join the dedicated focus groups for each of the six case studies that serve as the foundation of the project. Partners will liaise with DG-RTD Officers, and invite affiliated partners (i.e., from the OpenAIRE network) to join the dedicated PathOS workshops working towards awareness, problem setting, and ultimately validation of project results. PathOS will also seek opportunities to raise awareness of its work and outputs with key international stakeholders who have an interest in Open Science, e.g., UNESCO's various Open Science Working Groups, and the Global Science Forum of the Organization for Economic Cooperation and Development (OECD).

3.1.2. Target Group 2: University/Research Performing Organisation executives and managers

This group includes senior university management staff (i.e., vice-rectors, research managers) who need to better understand the pathways from policy to implementation and finally to impact. PathOS aims to enable the systematic assessment and monitoring of OS by producing a handbook of OS indicators. The work of university management staff and RPO executives can be supported in the following ways:

- Support in setting pragmatic and realistic expectations related to Open Science.

- Provide concrete recommendations on how their institutions/organisations can benefit efficiently and effectively from implementing the most fitting components and elements of Open Science. This could result in enhancing and ameliorating institutional research and the institution's impact strategies.

To engage with this group PathOS will reach out to major European organisations like the European University Association (EUA), the Association of European Research Libraries (LIBER) and European Association of Research Managers and Administrators (EARMA) and invite them to tailored workshops and present project findings via policy briefings in their respective newsletters.

3.1.3. Target Group 3: RI managers

RIs and eInfrastructures, as the main facilities that provide resources and services for the research communities (academia and industry), now need to better cater for and embed Open Science in their operations. In most cases, open resources and services are free at the point of use, meaning that research infrastructures need to find convincing arguments for the entities (e.g., research funders) that fund them. PathOS results can be beneficial to them by:

- Providing evidence of the benefits of practicing and enabling open science, notably how this generates impact and public value.

In order to reach out and engage with this target group, PathOS will utilise ELIXIR's RI managers in its 23 Nodes (who will in turn engage with their national funders), and also liaise with the European Strategy Forum on Research Infrastructures (ESFRI, a forum of government officials often based in Ministries funding research infrastructures) via the Athena RC and ERIC Forum. The project will also make use of OpenAIRE's National Open Access Desks (NOADs) and EOSC Association members.

3.1.4. Target Group 4: Research Librarians/Research support staff

Research libraries are the natural hubs where researchers and university administration come together and are often called upon to provide guidance on Open Science principles and practices. PathOS can provide:

- Setting the foundation and providing argumentation for committing and adhering to Open Science principles and practices, so that they can request more funding/commitment from senior management.
- Training via inviting this group to future training events as well as benefitting from the training toolkit that will be created.

To reach out to this target group, PathOS will utilize the OpenAIRE network and engage with LIBER (as the main research library association in Europe). PathOS outputs are expected to be presented to this audience and raise awareness via webinars and OpenAIRE tech clinics.

3.1.5. Target Group 5: Open Science experts/Researchers

Open Science experts, including implementers of Open Science practices, trainers, researchers, and policy makers will be a key target group throughout the project and experts will be invited to PathOS events, and targeted consultations, to validate and evaluate the project's results. Experts will also be called upon to join the project's advisory board. Their expertise will be requested to provide recommendations and feedback both on intermediary but also the project's final results. They will be targeted and involved from the beginning of the project and by doing so they will be able to:

- Get informed on the impacts of OS and join the discussion when it comes to the recommended methodologies for measuring them as well as for policy interventions.

To target this group, PathOS will leverage the extended networks of the project's partners and ensure that widely recognised experts, at a national, European and international level will be invited to join and contribute their expertise to inform project results.

3.1.6. Target Group 6: Scientometricians and Meta-science R&I evaluators

Data driven and AI assisted era of R&I is growing rapidly. Scientometrics, focusing on measuring and analysing scholarly literature and meta-science geared towards developing methodologies to study science, and their experts play a key role in this developing landscape. It is central to have a clear understanding of the new processes that are currently being developed but most importantly to understand how traditional qualitative methods are being embedded in these new processes.

- PathOS partners including ULEI, KNOW Center and CSIL will leverage their expertise and use their knowledge to provide insights deriving from their active research community related to metascience, research on research, science on science, scientometrics, quantitative science studies, science and technology studies and science policy studies.

In order to engage with this community, PathOS will mobilise ULEI's professional network and conference venues to present and also evaluate the project's findings. TGB's and CSIL's

networks will be contacted to ensure policy officers will participate to targeted workshops and webinars for this community.

3.1.7. Target group 7: (Open Access) Publishers

Open Access publishers are key for the dissemination of scientific outputs and in the context of the R&I Open Science ecosystem advancement they need to be part of the conversation. By involving them and reaching out, PathOS will:

- Ensure that they are recognized as a key stakeholder in the Open Science agenda and pave the way for their contribution to the ecosystem by keeping them informed and supporting them in the definition of potential new roles in which they can engage.

This group will be engaged via presenting PathOS results to Open Access Scholarly Publishers Association conferences. Moreover, implementers of PlanS will be reached out as well as academic publishers, OA publishing platforms and OA repository networks (i.e., via EIFL, COARA and others). The project will also seek out to engage with non-OA publishers in relation to Text and Data Mining (TDM).

3.1.8. Target group 8: Research Funders

Governments and funders (at the national, European & international level), including those funding research infrastructures, require concrete results and a straightforward and indisputable return of investment from research and science. They want a clear connection between science, innovation, and their engagement with society. Even though there have been strides in funding open science initiatives and practices, funders require compelling arguments to overcome any reluctance in investing in OS. By engaging with funders, PathOS can provide:

- Pragmatic insights and base reports to help evaluate the impact of OS requirements at various levels.
- Training to raise awareness on the benefits of funding OS.

Funders will be invited to targeted PathOS events (raising awareness webinars, training workshops) and will be informed about the PathOS recommendations and best practices via targeted policy briefs. ELIXIR will also regularly update its Board of funders (made of government officials based in Ministries funding open science and/or research infrastructures) of project progress.

4. Communication & Dissemination channels

To deliver the project's messages across the key target groups identified, PathOS will make use of the dissemination channels at its disposal to reach them and effectively communicate the ongoing work and future project results. The dissemination channels will serve as the promotional routes for the PathOS messaging to reach the appropriate target groups. For example, blog posts to introduce/raise awareness on the PathOS case studies will be uploaded on the website and results produced by other WPs could be presented at scientific conferences. Depending on the means of communication at hand, the most fitting channel will be selected to reach the needs of the respective audience.

4.1. Project Website

The main communication and dissemination channel for PathOS is the public website¹. The website will serve as the central channel to include all activities, updates, results, and news of the project. It has been developed in line with the project brand and visual identity and all main sections have been created. It will be regularly updated, and new sections might be created in line with the project progress. By sharing all key outcomes, tools and results via the website, PathOS will ensure that PathOS users and followers will be able to stay up to date in a transparent and efficient way.

The website will host the following key results/outcomes of the project:

- All public deliverables/reports.
- A portfolio of Open Science success stories
- Policy briefs and
- Tools and data to be created.

Securing the successful promotion and visibility of the PathOS website, it will be constantly promoted and referenced via the rest of the dissemination channels (i.e., social media accounts). To amplify exposure and maximize visibility, the project website will be regularly shared/promoted via mobilizing the PathOS partners networks, especially the OpenAIRE and ELIXIR respective networks. Cross-posting and forwarding PathOS communications via all partner networks will be crucial in securing website visibility and thus build the PathOS community.

¹ <https://pathos-project.eu/>

4.2. Social Media

The value of social media as dissemination channels is indisputable as they provide the platform to reach a wide and diverse audience and spread project updates and results more widely. Social media will be crucial for the first months of the project to reach a wider audience – including all key stakeholder groups identified – and spread awareness about the project and the results that will follow.

In order to achieve the best results and build towards creating a stable and engaged follower base, PathOS will rely on its partners networks to amplify and spread all outgoing messages. Social media activity will serve as the main platform both for the general introduction of the project to the wider public but also via having more targeted social media presence, reaching out to the key stakeholder groups.

The table below identifies all social media channels that have been created and shares the role and purpose they will fulfil for PathOS. Using the Grant Agreement as a basis, this plan adapted and reworked the suggested approach to better fit the needs of the project during the first year and its initial stages. As this is a living document, some changes to the intended actions below might occur during the project's lifecycle.

SOCIAL MEDIA CHANNEL	AIM	ACTION PLAN	FUTURE ACTIONS
Twitter account	Raise awareness during the first months of the project and work towards maximizing the project's visibility and building a wider follower base.	For the first months of the project aim at least one weekly update on current affairs.	As project results become finalized and can be shared publicly, posting activity will increase exponentially.
LinkedIn	Have a presence in a wide professional network – aiming at reaching out to policy makers/officers.	For the first months of the project aim at following key accounts and update on a bi-weekly basis.	As project results become finalized and can be shared publicly, posting activity will increase.
YouTube channel	The PathOS YouTube channel will serve as the dedicated space to upload video presentations, webinar and event recordings so that	Upload on a timely and efficient manner all videos that are produced for the project.	Ensure that the PathOS YouTube channel acts as the central aggregator of all project related video content.

	they can be shared via the other social media channels.		
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Table 2: PathOS social media channels, their aim and planning.

Twitter is ideal for creating short and to the point messaging for project updates. Via its account and strategic following and tagging it is envisaged that PathOS will successfully communicate its messaging to a wide audience including key target groups. Project partners will always be tagged so that they can get directly notified and retweet/forward the posts. The PathOS twitter² account has already been established as well as the official project hashtag #PathOS. Other relevant hashtags will be used, including but not limited to: #OpenScience, #ResearchReform, #OpenScienceIndicators, #ResearchAssessment.

LinkedIn is a more business-oriented medium that will be used by PathOS to reach out to a more targeted audience i.e., policy makers, policy officers, EU representatives. It is projected that the project will benefit more from utilizing this network as soon as project concrete results become available and can be communicated to this audience. The PathOS LinkedIn account³ has already been created and is ready to share these updates as soon as they are available.

The PathOS YouTube channel⁴ has already been created to serve as the hosting platform for all PathOS video materials (including interviews, promotional videos, and event recordings). Once the first video is uploaded this channel will become more active.

4.3. Newsletter

In order to share important updates/project results in a summarized way, PathOS created an account on Mailchimp, an email marketing tool, to use as the main tool to send out newsletters. As there is not enough information to share via a newsletter during the first year of the project, the newsletter will be sent out on a six-monthly basis on M6 and M12. The frequency of the newsletter will be evaluated on year 2, when more information will be available and there might be a need to send out and share information via this channel more frequently. The newsletter will be drafted to accommodate all possible audiences of PathOS. For each version of the newsletter, all partners will be required to contribute to its content to ensure that all important updates from each WP can be included and shared with the PathOS followers.

The newsletter can also serve as a means to publish important calls for experts, speakers, synergies. Its performance will be assessed using metrics such as click rates.

² https://twitter.com/PathOS_EU

³ <https://www.linkedin.com/in/pathos-project-462206264/>

⁴ https://www.youtube.com/@PathOS_EU

To share the newsletter subscription form, a dedicated link⁵ that can be shared via other channels has been created and the form has also been embedded on the project website.

The screenshot shows the PathOS website header with the logo and navigation menu (ABOUT, PARTNERS, ACTIVITIES & RESULTS, NEWS). Below the header is a newsletter subscription form. The form text reads: "Stay in touch. Subscribe to our newsletter". Below this is a sub-headline: "Be the first to learn about our workshops, our methods and tools, all our results." The form contains five input fields: "Your first name (*)", "Your last name (*)", "Your email address (*)", "Your affiliation", and "Your position". A black "Submit" button is located at the bottom of the form.

Figure 1: The PathOS newsletter subscription form embedded on the website.

4.4. Scientific journals and news websites

In the effort to generate positive media coverage, project results will be published in key scientific journals and well-known and established research news websites. By reaching out to these external stakeholders it can be ensured that the reach of PathOS will make it to national, European and also international news thus maximizing the impact that the project outcomes will be able to reach. The following channel a mere indicative list of relevant news outlets and scientific journals and this list will be regularly updated alongside the project's progress. A total of 30 articles is projected to be published throughout the project lifecycle.

4.4.1. Relevant websites for news publication & scientific journals

Websites

EC SUCCESS STORIES

⁵ <http://eepurl.com/ibjFUz>

PathOS can aim to publish a few articles of major achievements on the EC Success Stories⁶ dedicated webpage, which comprises a database of projects and success stories of EU-funded Research and Innovation.

EC WEBSITE (CORDIS)

Keep track of and make sure information on the project is regularly updated on the CORDIS page⁷.

OPEN ACCESS GOVERNMENT

Open Access Government⁸ is a digital publication website that provides an in-depth perspective on key public policy areas from all around the world, including health and social care, COVID-19, research and innovation, technology, government, environment and energy. It could serve as a very fitting outlet to publish all novelties deriving from the PathOS case studies.

RESEARCH WORLD

Research World⁹, is a news platform powered by ESOMAR¹⁰ (the business community for market, social, and opinion researchers), focused on sharing innovative stories from the from the insights and analytics sector.

UPSTREAM BLOG

Upstream Blog¹¹ is supported by FORCE11 and aims to provide an inclusive discussion platform by bringing together original content and diverse perspectives from all corners of scholarly communications from institutions to libraries to researchers to publishers to funders and policymakers.

THE SCHOLARLY KITCHEN

A news website¹² dedicated to publishing internationally everything related to scholarly communications. Project results/updates could be published on this platform as a way to reach out to a more international audience and expand the project's reach.

ESAC INITIATIVE

⁶ https://research-and-innovation.ec.europa.eu/projects_en

⁷ <https://cordis.europa.eu/project/id/101058728>

⁸ <https://www.openaccessgovernment.org/>

⁹ <https://researchworld.com/>

¹⁰ <https://esomar.org/>

¹¹ <https://upstream.force11.org/>

¹² <https://scholarlykitchen.sspnet.org/about/>

A community website¹³ aimed at promoting workflow efficiencies and library-driven standards in the management of Open Access article processing charges. Via targeting this community, PathOS can reach to research librarians as a key identified target group.

Scientific Journals

LIBER QUARTERLY

LIBER Quarterly¹⁴ is the peer reviewed, Open Access journal of LIBER, the Association of European Research Libraries. One of the main aims is to cover all aspects of modern research librarianship and scientific information delivery. By publishing on LIBER Quarterly, the librarian community will be reached.

ISSUES

Issues in Science and Technology¹⁵ is a quarterly journal published by the National Academies of Sciences, Engineering, and Medicine and Arizona State University. The journal serves as a forum of public policy related to science and technology, and it could serve as the channel to publish updates on the PathOS policy agenda on an international scale.

4.5. Publishing project results

Public deliverables and Open Access publications explain the project objectives, strategies and the plan of action to achieve the objectives and present the intermediary and final project results. An indicative list of OA publication outputs is showcased below.

4.5.1. Open Research Europe

Open Research Europe¹⁶, is the open access publishing platform of the EC, for the publication of research stemming from Horizon 2020, Horizon Europe and/or Euratom funding across all subject areas. The main benefits of ORE include an open peer review model, a fast publication process and free of charge transparent publishing (for researchers who have received a grant through Horizon 2020 or Horizon Europe).

This will provide one option for project partners wishing to publish project-related outputs.

4.5.2. Zenodo

¹³ <https://esac-initiative.org/>

¹⁴ <https://www.liberquarterly.eu/>

¹⁵ <https://issues.org/>

¹⁶ <https://open-research-europe.ec.europa.eu/>

Zenodo¹⁷ is an OpenAIRE service, developed and hosted by CERN, and it serves as an all-catch Open Access repository. Zenodo allows researchers across all disciplines to archive and share their research objects with the world-wide research community. All public deliverables of PathOS will be published on Zenodo and the shareable link to the entry will be added to the project website.

In order to aggregate all publications related to PathOS, a designated Zenodo community will be created.

4.6. Partners' communication and dissemination channels

Key to the success of an efficient communication and dissemination plan is mobilizing and fully taking advantage of the project partners' channels, so a snowball effect can be created and as many target groups and as wide of an audience as possible can be reached.

In order to ensure that PathOS is visible and active on the partners' channels, WP5 will regularly check with the consortium and offer any support or any materials in relation to the promotion of PathOS as needed.

4.7. Synergies

Special attention will be given to creating the space and laying the foundation for meaningful synergies with other Horizon 2020 and Horizon projects, as well as other organisations and initiatives. Allocating the time and working towards building successful collaborations will help reach out to a wider audience and bring visibility to the project as well as reaching the key target groups. A monitoring list (see section 6.1) has been created to keep track of the relevant projects and initiatives to track their activities and identify possible collaborative activities that could be sought out.

4.8. Events

Events organised by PathOS will serve as a key means of disseminating project results, acquiring feedback and engaging with the key target groups. In any format (online, hybrid or in-person), events provide an excellent platform for key stakeholders to come together, network and build on, creating long term relationships that will be fostered throughout the project lifecycle.

¹⁷ <https://zenodo.org/>

4.8.1. Events organized by PathOS

Events organized by the project will be central in gathering necessary input for the successful finalization and implementation of project results, for raising awareness on the project activities and for mobilizing the target groups. The best format to achieve this is via organising targeted workshops, that aim to bring key stakeholder groups to the table and promote knowledge sharing and problem solving in an efficient and collaborative way.

A total of four workshops will be organised by the end of project. After year 2, PathOS will also organise a series of four training webinars mainly targeting policy officers, funders, university and RI executives and librarians. In order to disseminate and promote all key project results a final conference will be organised towards the end of the project lifecycle.

EVENT	TYPE	AIM	TARGET GROUP(S)	TIMELINE	PLACE
Workshop 1; KIP presentation	Workshop	First round of feedback on KIP model	OS Experts	Delivered on M7 (May 2023)	In-person, Brussels, Belgium
Workshop 2; Finalisation of KIP	Workshop	Final validation of KIP model	Case study leads, OS Experts	Delivered on M18 (February 2024)	In-person, location to be confirmed
Webinar Training 1;	Webinar	Providing training & awareness on project outcomes	University/library /RI executives	Delivered on M19 (March 2024)	Online
Webinar Training 2;	Webinar	Providing training & awareness on project outcomes	Policy officers and funders	Delivered on M21 (May 2024)	Online
Workshop Validation of Indicators 3;	Workshop	Validation of Handbook of Indicators	Case study leads, OS Experts, Scientometrics Meta-science R&I evaluators	Delivered on M28 (December 2024) - provisional date	In-person or online. Preferred format to be confirmed

Webinar Training 3;	Webinar	Presenting the training toolkit. (Building on previous webinar agenda)	University/library /RI executives/managers	Delivered on M29 (January 2025)	Online
Webinar Training 4;	Webinar	Presenting the training toolkit. (Building on previous webinar agenda)	Policy officers and funders	Delivered on M31 (March 2025)	Online
Workshop 4 (a sub-series of 3 workshops); Policy Recommendations	Workshop	A series of 3 online co-creation workshops aimed at creating recommendations with and for all target groups	Invited experts from key PathOS target groups	Delivered on M34 (June 2025) - Exact dates for each of the workshops to be confirmed.	In person or online. Preferred format to be confirmed
Final PathOS conference	2-day Conference	The final event of PathOS aimed at presenting all key project outputs.	Representatives of PathOS target groups.	Delivered on M35 (July 2025)	In-person conference.

Table 3: Timeline of PathOS events.

4.8.2. External events

To ensure the successful promotion of project results and raise awareness about the main aims and outputs of PathOS, project partners will be encouraged to attend key events that will be

organised by external parties/organisations. WP5 will encourage project partners to attend and also assist partner participation in those events. A list of relevant upcoming events has been created listing important deadlines (see below Monitoring & Impact section of the plan), call for proposals' details, major themes and key stakeholder groups targeted at each event. By participating at external events, the relevant scientific communities will be able to get acquainted with the project, follow its progress and potentially joining future PathOS actions as experts. A list of possible events could include (but not limited to) the following: conferences, workshops, OS focused events, exhibitions, Horizon Europe and EC events.

Below is an indicative list of relevant major OS events to be followed and attended by PathOS partners (as the project progresses more will be included):

EVENT	TYPE	ORGANISER	TARGET GROUP(S)	WHEN	PLACE
Open Repositories Conference	Conference	Open Repositories	Librarians/Research support staff, Open Science experts	June-July annually (next one 12-15 June 2023)	In-person
LIBER Conference	Conference	LIBER	Librarians/Research support staff, Open Science experts	June-July annually (Next one 5-7 July 2023)	In-person
OS FAIR 2023	Conference	OpenAIRE	Librarians/Research support staff, Open Science experts, RI management National eInfras, R&I policy makers & policy officers, University/RPO executives	September (bi-annually) (Next one 25-27 September 2023)	In-person
STI 2023	Conference	CWTS in collaboration with ENID	Scientometrics Meta-science R&I evaluators, R&I policy makers & policy officers	Every four years (next one 27-29 September 2023)	In-person
OASPA Conference	Conference	OASPA	(OA) Publishers	Annually in September	In-person

				(next one to be confirmed)	
EUA Conference	Conference	EUA	University/RPO executives	Annually (next one 20-21 April 2023)	In-person
EARMA Conference	Conference	EARMA	University/RPO executives	Annually (next one 24-26 April 2023)	In-person
EOSC Symposium	Conference	EOSC Association	Policy makers/officers	Annually (next one September 2023)	In-person
AESIS Events	General Events (including workshops and conferences)	AESIS	Librarians/Research support staff, Open Science experts, Scientometrics Meta-science R&I evaluators	Next conference on March 2023	In-person
UNESCO Open Science Working Groups	Working Groups	UNESCO	Open Science experts	Regular meetings	Online
COAR Annual meetings	Conference	COAR	Librarians/Research support staff, Scientometrics Meta-science R&I evaluators	Annually, next meeting: San José, Costa Rica on from May 16-18, 2023	In-person
Science Europe Conference	Conference	Science Europe	R&I policy makers & policy officers, University/Research Performing	Annually	In-person

			Organisation (RPO) executives and managers, Research Infrastructures managers		
Eurodoc Conference	Conference	Eurodoc	University/Research Performing Organisation (RPO) executives and managers, Open Science Experts/Researchers	Annually	In-person

Table 4: Suggestions for external events to be attended by PathOS partners.

5. Communication and Dissemination tools & materials

For the effective communication of project results to the different stakeholders and to raise awareness about the project, PathOS will develop tools and materials that will be used by project partners to engage with the different target groups. These will be regularly updated to fit the needs of the project throughout its lifecycle.

5.1. Branding guidelines

To ensure the consistency of all project tools and materials, a branding guidelines document has been drafted that outlines the correct and appropriate use of the materials while maintaining a strong project identity.

The branding guidelines can be found in Annex 1.

5.2. Publication guidelines

To ensure that project results will be published and disseminated according to OS principles, project partners will be encouraged to follow guidelines that will help regulate authorship and provide clear instructions to all contributors. To this end, project partners will be encouraged

to follow OpenAIRE's interoperability guidelines¹⁸ to ensure all artifacts are linked to each other, providing crosswalks between publication-data-code-algorithm-service.

Furthermore, all project publications should acknowledge the funding using the following text:

"This project has received funding from the European Union's Horizon Europe framework programme under grant agreement No. 101058728. Views and opinions expressed are however those of the author(s) only and do not necessarily reflect those of the European Union or the European Research Executive Agency. Neither the European Union nor the European Research Executive Agency can be held responsible for them."

5.3. Communication & Dissemination materials

5.3.1. Dissemination Toolkit

For the consistent presentation of the PathOS brand a dissemination toolkit¹⁹ has been created and published on the PathOS website.

The public dissemination toolkit includes:

- The project logo



Figure 2: PathOS logo without the tagline



Figure 3: PathOS logo with the tagline

- The PathOS poster introducing the project²⁰ (See Annex 2)

¹⁸ <https://guidelines.openaire.eu/en/latest/>

¹⁹ <https://pathos-project.eu/dissemination-toolkit>

²⁰ https://pathos-project.eu/images/PathOS_Branding/PathOS%20poster%20-%20final.pdf

5.3.2. Standard project presentation

For raising awareness during the infancy of the project, a standard project presentation that includes all useful information to introduce the project to diverse audiences has been created. The purpose of this presentation is to give a thorough introduction on the project aims, introduce the partners, be adapted to fit specific audiences, and tailored to each occasion.

5.3.3. Project brochure

To introduce the project in a more marketable way, a brochure will be produced. The brochure will include all key information about the project, and it is intended to be used as printed material so that it can be used as promotional materials during events either organized by PathOS or where PathOS will be represented.

5.3.4. Video presentations

A promotional video introducing the project and catering to the visual identity will be developed during the first year with the intention to further raise awareness and be used in conjunction with the rest of the dissemination materials. It is intended to create more visual materials as the project progresses after year two.

5.3.5. Project templates

To maintain a consistent way of reporting for the PathOS project, several templates have been created so that they can be used by partners and to report on project activities and present PathOS to external stakeholders in a homogenous way.

The templates include (but are not limited to):

- A letterhead, see Annex 3.
- A PowerPoint presentation, see Annex 4.
- Standard word document for deliverables.
- Standard word documents for WP and SC meetings.

As the project progresses there might be a need to enrich this list of templates to include additional documents.

5.3.6. Interviews

To raise awareness on the project activities, a communications campaign focusing on the six case studies encompassing the project was launched in December 2022. All case study leads

will be interviewed following a Q&A format to delve deeper into the role of each case study for PathOS and establish the connection for the wider OS community/context in an interactive way. The first interview²¹ has already been published on the project website along with the rest of the studies to follow in a roll-out plan aiming at publishing one interview per month.

Similar communication campaigns involving interviews with project partners and in the future with relevant external stakeholders will be planned throughout the project lifecycle to raise awareness and create interactive information material on project outcomes and results. A total of 15 interviews is envisioned to be published by the end of the project.

5.3.7. Press releases

Official press releases communicating important news, achievements and milestones of the project will be published on the project website to provide an added level of formality when it comes to communicating major accomplishments. A total of about 12 press releases is predicted to be published by the end of the project.

6. Monitoring and Impact

Regularly monitoring the impact and success of all communication, engagement and dissemination activities is crucial in evaluating the project's actions and thus ensure the delivery of the results while keeping all key target groups engaged. To this end, several monitoring lists that track all project activities and online presence have been created and will be regularly updated. As the communications, engagement and dissemination plan is envisaged to be a living document that will be regularly updated during the project's lifecycle, having a monitoring system in place will help towards updating, revisiting, and optimising the approaches adopted by PathOS.

6.1. Monitoring lists

Several lists have been created to monitor and provide updates on the project's activities. These files have been uploaded on the collaborative shared space of the project and will be regularly updated both by WP5 and all partners.

²¹ <https://pathos-project.eu/how-open-bioinformatics-resources-foster-innovation-in-industry-a-short-interview>

General information about the event							
Event	Date, Place	Purpose	Number of attendees	Relation to WPs, and Tasks in the project	Supporting documentation (links)	Targeted stakeholders	Additional information

Figure 4: PathOS Events

Events to be attended by PathOS									
Event	Place (if in person fill in the location otherwise virtual/hybrid)	Date	Submitted?	Participation (ws, presentation, poster etc)	Deadlines, details for the calls for proposals	Relation to WPs, and Tasks in the project	Supporting documentation (links)	Targeted stakeholders + estimated numbers	Additional information

Figure 5: Events to be attended by PathOS

Relevant projects / possible collaborations						
Project	Relevance to PathOS	Possible collaboration	Relation to WPs, and Tasks in the project	Supporting documentation (links)	Targeted stakeholders + estimated numbers	Additional information

Figure 6: Relevant project/possible collaborations/synergies with PathOS

7. Conclusions and next steps

In this plan, an overview of the first-year activities and plan has been laid out as well as activities that will roll out for year two and year three of the project. Monitoring of the impact of these activities will help determine the need for further or complimentary actions to achieve the promotion, visibility and uptake of project results.

In the first six months of the project, the visual identity and the brand of PathOS was built. All channels that will be used for the communication and dissemination of project results, including the public project website and social media accounts, were developed and publicized. Materials and tools that will be useful for the dissemination of project results and at an initial

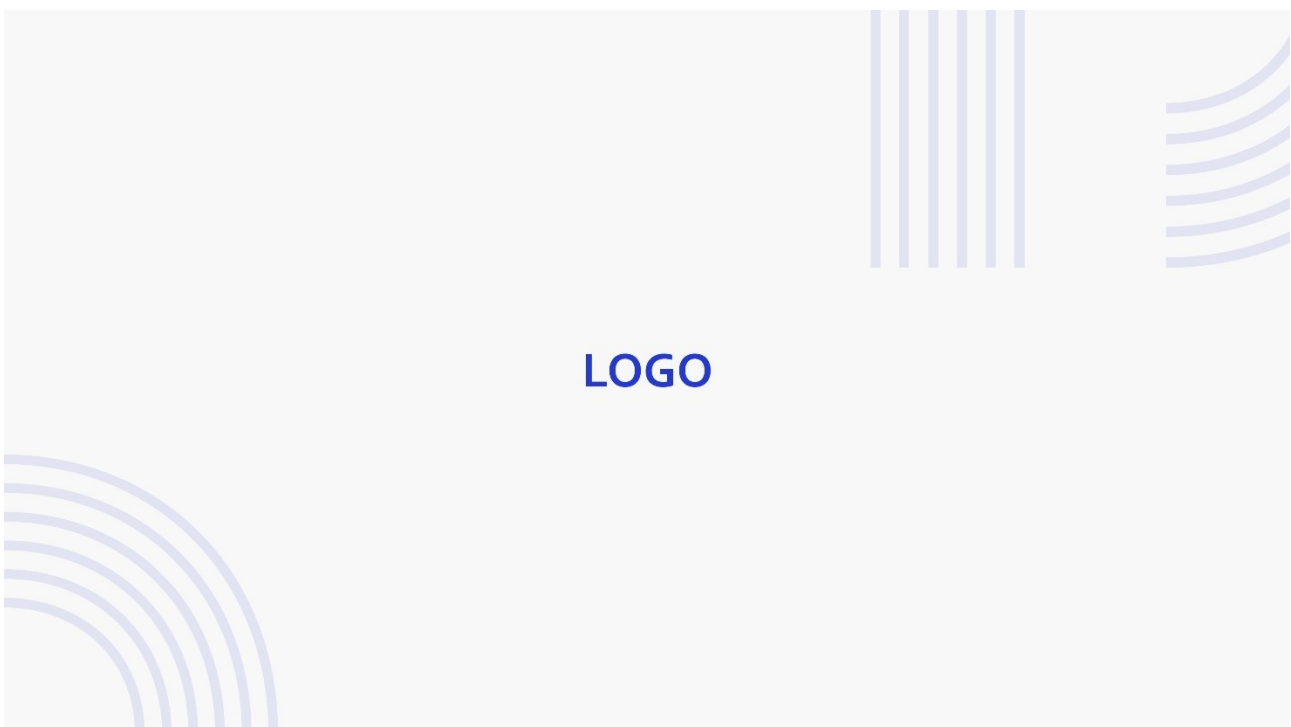
stage, to raise awareness about the project aims, and to support the project partners, were developed (including PathOS branded templates, poster, logos, newsletter form).

In year two, the communication, engagement and dissemination plan will be updated based on feedback received from the identified target groups. The first results of the project will be communicated and validated via organising targeted workshops with invited policy makers/officers.

In the final year of the project, the main focus will be placed on disseminating the project's final results, best practices identified, as well as lessons learnt throughout the process. Partners will be encouraged to submit scientific publications related to the project's final results, in order to further promote and widen the reach and legacy of the project. Special attention will be dedicated to supporting the exploitation and sustainability of the key Pathos exploitable results.

8. Annexes

8.1 Annex 1 – Branding Guidelines



BASE LOGO



Persian Blue

HEX	243AD9
RGB	36,58,217
HSB	231,83,85
CMYK	87,77,0,0

Battleship Gray

HEX	243AD9
RGB	36,58,217
HSB	231,83,85
CMYK	87,77,0,0

BLACK AND WHITE



LOGO DO



LOGO DONT



Don't stretch or condense



Don't recolor the logo



Don't add any effects



Don't change the placement of any elements



Don't alter the typeface



Don't use outline or stroke



Don't use a busy background



Don't rotate



Don't use elements alone

LAYOUT

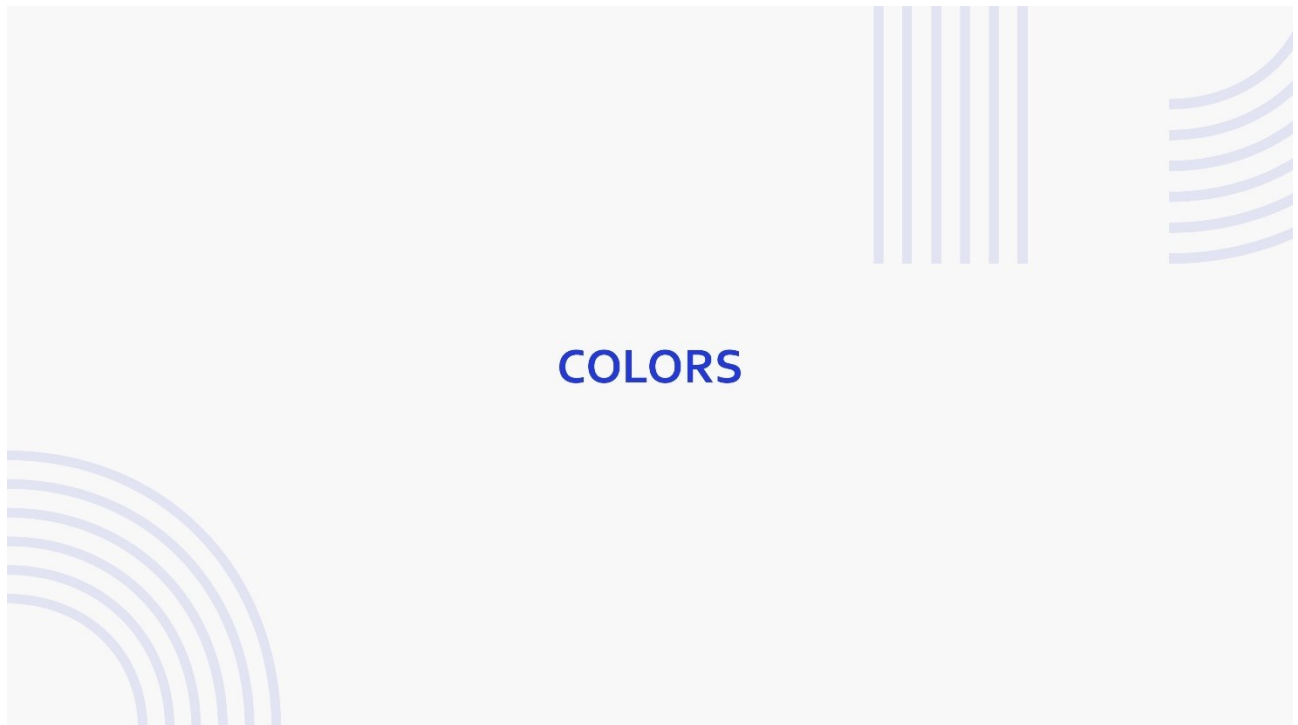
EXCLUSION ZONE

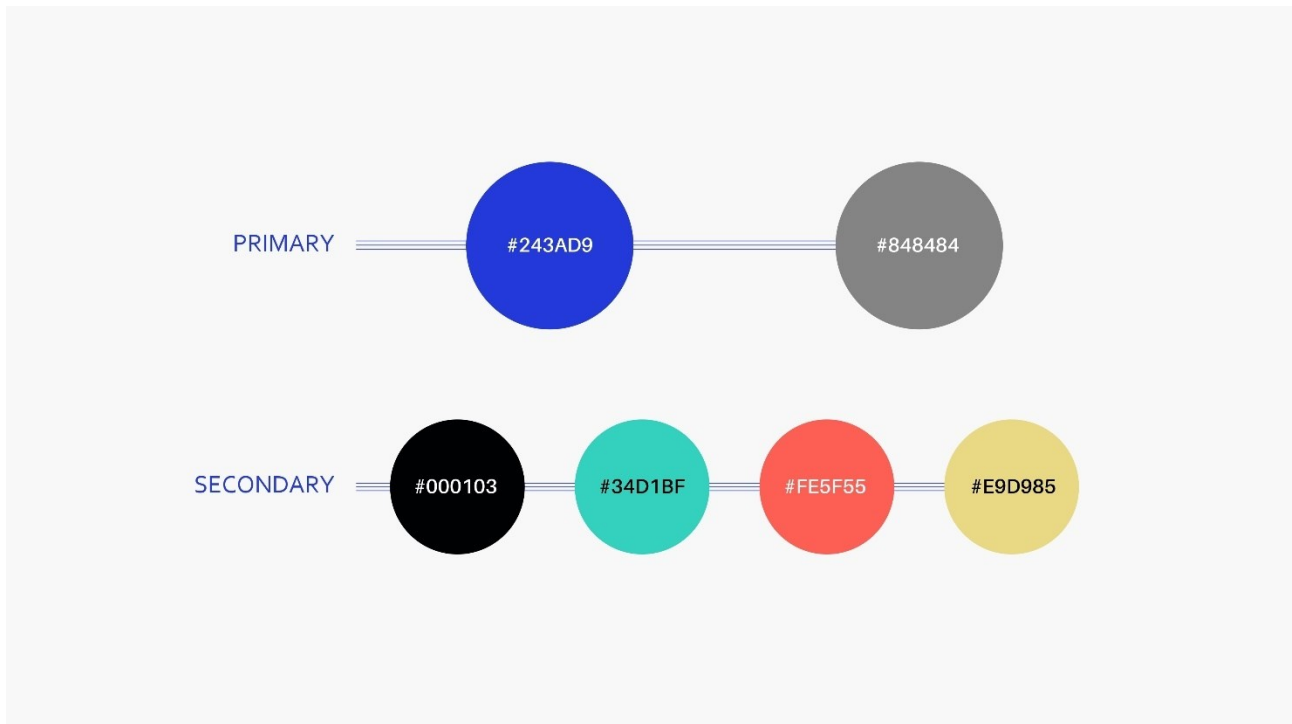


MINIMUM LOGO SIZE



COLORS





8.1. Annex 2 – PathOS poster

PathOS OPEN SCIENCE IMPACT PATHWAYS

The aims of the project

PathOS is a Horizon Europe project aiming to collect concrete evidence of Open Science effects, study the pathways of Open Science practices, from input to output, outcome and impact, including the consideration of enabling factors and key barriers.

Outcomes

- 1** Evidence to support a better understanding of the implications of Open Science for science, economy and society.
- 2** Recommendations to policy makers and other actors in the R&I ecosystem as to how and to what extent Open Science should be promoted in a balanced way.
- 3** Innovative tools and methods for Open Science impact indicators and Cost Benefit Analysis framework using big data for studying the causal effects of Open Science.

Six case studies to drive our activities



Accelerating collaborations within academia & industry



Research data and knowledge /use in non-academia



Cross cutting effects due to Open Research data from National Repository



Open Science in reducing & remedying structural inequalities



Open Science Practices during the COVID-19 pandemic



Innovation from open Research resources

PathOS brings an interdisciplinary team

Open Science experts, infrastructure developers/operators, bibliometrics/sciento metrics, data scientists, NLP/ML experts, sociologists, experts in socio-economic impact assessment and policy experts.



This project has received funding from the European Union's Horizon Europe framework programme under grant agreement No. 101059226. Views and opinions expressed are however those of the author(s) only and do not necessarily reflect those of the European Union or the European Research Executive Agency. Neither the European Union nor the European Research Executive Agency can be held responsible for them.



8.2. Annex 3 – Letterhead template

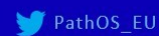


8.3. Annex 4 – PowerPoint presentation template



Pathos

Open Science Impact Pathways



Open Science Impact Pathways



