

D10.1

**EOSC Future
Stakeholder
Engagement and
Communication
Strategy and Plan**

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D10.1 / EOSC Future Stakeholder Engagement and Communication Strategy and Plan

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Abstract

This deliverable describes the primary stakeholder engagement and communication objectives, priorities and activities and the specific monitoring mechanisms to ensure a successful project.

The first chapter consists of the introduction. The second chapter defines the different categories of users/audiences with whom EOSC Future will engage. Chapter three outlines the engagement strategy for the project, providing an overview of the engagement objectives and concrete activities to reach them. Chapter four details the strategy to promote EOSC Future. It describes the mechanisms to communicate and disseminate project outcomes, support user engagement activities and promote the uptake of EOSC products and services. Finally, chapter five describes how the WP10 team will evaluate the success of the engagement and communication activities and how the WP will monitor their progress throughout the project. Chapter six provides conclusions.

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List of Abbreviations

Acronym	Definition
AAI	Authentication and Authorisation Infrastructure
AISBL	Association Internationale Sans But Lucratif / International Non-Profit Association
API	Application Programming Interface
BHL	Biodiversity Heritage Library
BoD	Board of Directors
CLARIN	Common Language Resources and Technology Infrastructure
CNRS	Centre national de la recherche scientifique / French National Centre for Scientific Research
DESY	Deutsches Elektronen-Synchrotron / German Electron Synchrotron
DIH	Digital Innovation Hub
EARMA	Research Managers and Administrators within Europe
EC	European Commission
EGI	European Grid Infrastructure
EIF	EOSC Interoperability Framework
EOSC	European Open Science Cloud
ERIC	European Research Infrastructure Consortium
ESA	European Space Agency
ESCAPE	European Science Cluster of Astronomy & Particle Physics ESFRI Research Infrastructures
ESFRI	European Strategy Forum on Research Infrastructures
EU	European Union
EUA	European University Association
EUDAT	European Data Infrastructure
EURODOC	European Council of Doctoral Candidates and Junior Researchers
ExPaNDS	European Open Science Cloud (EOSC) Photon and Neutron Data Service
FAIR	Findable, Accessible, Interoperable and Reusable
FEL	Free Electron Laser
FMI	Finnish Meteorological Institute
GBIF	Global Biodiversity Information Facility
GDPR	General Data Protection Regulation
GEANT	Gigabit European Academic Network
GEOSS	Global Earth Observation System of Systems
GRNET	National Infrastructures for Research and Technology
HPC	High Performance Computing

ICOS	Integrated Carbon Observation System
INOSC	International Network of Open Science Communities
IOBIS	Ocean Biodiversity Information System
JRC	Joint Research Centre
KPI	Key Performance Indicator
LERU	League of European Research Universities
LTP	Linked Third Parties
NI4OS	National Initiatives for Open Science
NGI	Next-Generation Internet
NREN	National Research and Education Network
NOAD	National Open Access Desk
PaN	Photons and Neutrons
PaNOSC	Photon and Neutron Open Science Cloud
PRACE	Partnership for Advanced Computing in Europe
RDA	Research Data Alliance
RDM	Research Data Management
RFO	Research Funding Organisations
RPO	Research Performing Organisations
SEE	Southeast Europe
SME	Small and Medium-sized Enterprise
SP	Science Project
SRIA	Strategic Research and Innovation Agenda
UKIM	University Ss Cyril and Methodius in Skopje
WP	Work Package

1 Introduction

This deliverable describes the primary stakeholder engagement and communication objectives, priorities and activities and the specific engagement mechanisms to ensure the success of the project. It will be used to guide the implementation of the engagement and communication activities of EOSC Future and will be continuously monitored and updated by WP10.

Researchers are at the centre of EOSC. It is therefore fundamental that the EOSC development moves in the direction that brings the most value for these researchers, who are the platform's primary users. The deliverable consists of three main topics:

- Who are the EOSC Future target stakeholders.
- The EOSC Future Engagement Strategy and Plan.
- The EOSC Future Communication Strategy and Plan.

The deliverable identifies who the target audience for the engagement and communication activities is. As part of the Engagement Strategy and Plan, this document further explains the context of the upcoming open calls such as RDA grant calls, EOSC DIH Business Pilots and the EOSC Future User Group as engagement mechanisms. The communication strategy and plan also provide an overview of what kind of communication channels and approaches the project will use.

The engagement and communication plan gives an overview of its proposed activities as well as background information for the EOSC Future work packages to build on. Work package 10 (WP10) is responsible for the definition and organisation of the engagement and communication plan of EOSC Future project. However, EOSC Future engagement and communication activities are performed in all the EOSC Future work packages on different levels.

The aim of this document is to provide a coherent framework and guidance for all engagement and communication activities within the EOSC Future – for its stakeholders, customers, and end-users. There are many stakeholders that have a direct or indirect influence on EOSC's development. EOSC Future involves experts in the co-design of the EOSC Architecture and Interoperability Framework and EOSC users in the development of EOSC Future solutions. In particular, the deliverable focuses on the following themes.

- **Chapter 1** introduces the Engagement and Communication Strategy and Plan.
- **Chapter 2** defines who the EOSC Future target stakeholders are and the different categories of users/audiences that EOSC Future will engage.
- **Chapter 3** outlines the engagement strategy for the project, providing an overview of the engagement objectives and concrete activities to reach them.
- **Chapter 4** details the strategy to promote EOSC Future. It describes the mechanisms to communicate and disseminate project outcomes, support user engagement activities, and promote the uptake of EOSC products and services.
- **Chapter 5** describes how the WP10 team will evaluate the success of the engagement and communication activities and how the WP will monitor their progress throughout the project.
- **Chapter 6** presents the conclusions.

The chapters are followed by four appendixes are attached. **Appendix A** presents an overview of all upcoming RDA calls. **Appendix B** gives a glance at the planned collaboration with other projects. **Appendix C** is the EOSC Future high-level engagement and communication calendar. **Appendix D** includes messaging support for the project's most common and potential questions.

References are listed at the end of the deliverable. The List of Abbreviations can be found in the beginning of the document.

2 Who Are the EOSC Future Users

The term *user* identifies all the stakeholders. It encompasses both those who consume EOSC data or resources and those that contribute to the co-design of EOSC Future solutions by providing resources, sharing requirements, or testing solutions. Stakeholders have therefore been grouped into three categories: consumers, providers, facilitators/intermediaries.

Naturally, some organisations fall under multiple categories. A university library, for example, may provide resources by integrating its data repository into EOSC in addition to being a facilitator to enable further uptake by researchers. To avoid unnecessary duplication, the following classification only reflects an organisation's primary role.

2.1 EOSC Consumers

This is the most important stakeholder category for EOSC Future specifically and EOSC Future in general. It will thus be the primary focus of the project's stakeholder engagement and communication efforts. Consumers include both end-users that use or are intended to use EOSC resources as well as customers that are individuals or business that purchase EOSC services. Their different needs will be considered in all engagement activities.

The end-user/researcher is the primary beneficiary of EOSC and the reason for its creation. EOSC Future's engagement will largely target research communities via representative bodies that can act as a conduit and represent their needs. These include research associations, learned societies and Research Infrastructures. Engagement activities will also reach out directly to individual researchers and citizen scientists. These audiences will receive attention in the communication activities, particularly in targeted communication campaigns.

Table 2-1 EOSC Future consumers

Stakeholder group	Examples
Research communities	research groups, networks, laboratories, or representative bodies at the disciplinary level that can act as a conduit such as academic associations, learned societies and Research Infrastructures
Individual researchers	individual researchers
Citizen scientists	citizen scientists, including platforms like Zooniverse
Commercial entities	private companies interested in using the EOSC services

2.2 EOSC Providers

Much of the engagement in EOSC projects to date has focused on providers to develop the infrastructure and services needed. EOSC Future will continue these efforts, focusing on:

- the coordination between the e-Infrastructures to deliver the EOSC-Core.
- engagement with Research Infrastructures to federate their services and resources into EOSC.
- a variety of public and private sector providers who wish to offer services via EOSC.

Table 2-2 EOSC Future providers

Stakeholder group	Examples
European e-Infrastructures	EGI, EUDAT, GÉANT, OpenAIRE, PRACE, national e-Infrastructures, HPC and cloud initiatives
Research Infrastructures	ESFRI science clusters, thematic clouds, ERICs, EIROforum RIs, AISBLs, national Research Infrastructures, national labs
Private sector	commercial service providers, business organisations, SMEs, start-ups, innovators

Others	organisations, community groups or other stakeholder categories including, for example, open-source communities
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2.3 EOSC Facilitators and Intermediaries

Many stakeholder groups influence EOSC indirectly, either by funding relevant initiatives, setting policy that affects operation and uptake, coordinating global fora or setting standards. Organisations may also act as technology or research enablers by providing appropriate training and support.

The stakeholders in this category include those that support EOSC as well as related initiatives the project should align or collaborate with. It is therefore essential that EOSC Future liaises with them, especially to stimulate uptake.

Table 2-3 EOSC Future facilitators and intermediaries

Stakeholder group	Examples
Research funders	EU funders, Member States, national funding bodies, private funders, industry
Policymakers	regulatory bodies on data privacy, on competition, on research; research policy organisations
Institutions	universities, research performing organisations, national laboratories, research institutes
Libraries	university libraries, data repositories, virtual libraries such as Biodiversity Heritage Library (BHL), publishers
Research administrators	Research Performing Organisations (RPO) and the community of Research Managers and Administrators within Europe (EARMA) staff in charge of compliance (policy) and monitoring
Data/research initiatives	global coordination fora and organisations, Research Data Alliance (RDA), European Open Science Cloud (EOSC) and Open Science national initiatives, EC-funded projects, e-science groups, operational agencies (ESA, JRCs, etc.), big data projects (e.g., EC Data Spaces, national, European and global observatories), global aggregators (e.g. GBIF, IOBIS), GAIA X, EuroHPC, Global Earth Observation System of Systems (GEOSS)
EOSC Partnership	EOSC Association, EOSC Steering Board, European Commission

3 EOSC Future Engagement Strategy and Plan

3.1 How the EOSC Future Engagement and Communication Is Organised

The EOSC Future engagement and communication activities are performed at different levels in *all* the EOSC Future work packages. WP10 is responsible for the definition and organisation of EOSC Future’s engagement and communication plan. In addition, it coordinates and implements this plan within and across the other work packages, collaborating closely with the consortium partners involved. To do so, the WP10 will rely on the strategic inputs from WP2.

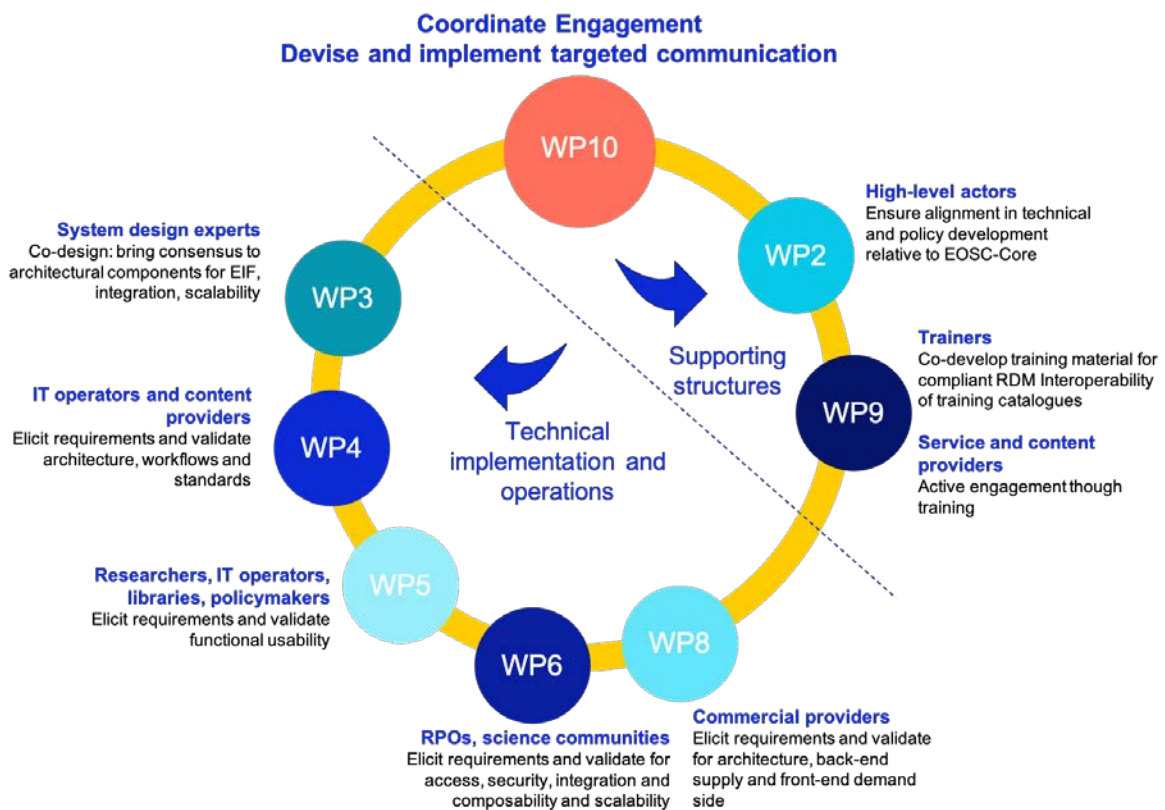


Figure 3.1 Systematic approach to coordinated engagement and targeted communication

WP10 has appointed specific interfaces to participate in the meetings of other work packages and liaise with work package leaders and task leaders. This will ensure a good flow of information between WP10 and the other work packages. The interfaces will drive and supervise the engagement and communication activities related to each specific WP. They will also act as a primary contact point for emerging engagement and communication needs in work packages.

The table below shows the names of the interfaces, and the main engagement and communication needs per work package.

Table 3-1 WP communication needs and WP10 interfaces

WP #	WP name	WP10 interfaces	Main support provided by WP10
WP2	project strategy and EOSC alignment	Sara Garavelli (EUDAT), Inge van Nieuwerburgh (OpenAIRE)	<ul style="list-style-type: none"> implementation of the strategic engagement/ communication needs identified by WP2
WP3	architecture and interoperability	Sara Garavelli (EUDAT), Sarah Jones (GÉANT)	<ul style="list-style-type: none"> promotion of the WP3 Working Groups and engagement of experts

			<ul style="list-style-type: none"> organisation of consultations promotion and dissemination of WP outputs
WP4	design and development of portal supply layer	Ilaria Fava (OpenAIRE)	<ul style="list-style-type: none"> requirements/feedback collection promotion of the new solutions developed by EOSC Future promotion and dissemination of WP outputs
WP5	design and development of portal demand layer	Sara Garavelli (EUDAT), Anca Hienola (FMI)	<ul style="list-style-type: none"> requirements/feedback collection promotion of the new solutions developed by EOSC Future promotion and dissemination of WP outputs
WP6	integration of community services and products into EOSC	Stephen Serjeant (CNRS), Daan Broeder (CLARIN), Patrick Fuhrmann (DESY), Magdalena Brus (ICOS)	<ul style="list-style-type: none"> requirements/feedback collection promotion of the new solutions developed by EOSC Future uptake and widening the user base (incl. providers, research communities, researchers, and citizen scientists) promotion and dissemination of WP outputs
WP7	EOSC service planning and delivery	Gwen Franck (EGI) (liaises with Matthew Viljoen (EGI))	<ul style="list-style-type: none"> broadening the provider base establishing a continuous dialogue with providers promotion and dissemination of WP outputs
WP8	commercial services	Sarah Jones (GÉANT), Gwen Franck (EGI)	<ul style="list-style-type: none"> requirements/feedback collection promotion of DIH open calls promotion and dissemination of WP outputs
WP9	training and skills	Ilaria Fava (OpenAIRE)	<ul style="list-style-type: none"> requirements/feedback collection promotion and dissemination of WP outputs

3.2 Overall Engagement Objectives

Development in EOSC Future is driven by researchers' needs, specifically their need to efficiently deliver high-quality research. While the EOSC may introduce new, exploratory offerings whose added value is not immediately clear, it is still imperative that EOSC focuses on helping researchers and on improving the agility, effectiveness, innovation, and impact of research in Europe. It is thus imperative that EOSC Future implements the necessary mechanisms to better understand researchers' needs and takes the appropriate measures to engage them throughout the design and implementation phases.

Starting from a user outreach programme or a traditional *sales-type* approach, EOSC Future will implement a fully-fledged user engagement programme. The overall goal of this programme is twofold:

- involve users directly and repeatedly in the **design** and **creation** of key elements of the architecture (standards, APIs, workflows, accessibility), development, and operations (scalability, legal, business).

- aim at increasing **user uptake** by promoting the offering, showcasing the benefits of supplying and consuming resources in a stable environment with a smooth user experience.

3.3 EOSC Future’s Engagement Strategy

EOSC Future’s engagement strategy keeps pace with EOSC Future technical roadmap. It is built to achieve the main engagement objectives of ensuring an inclusive co-design of EOSC Future-specific solutions as well as the EOSC architecture interoperability. At the same time, it will aim at increasing broad uptake and an expanded user base.

The engagement strategy revolves around three main pillars:

- **Pillar 1** – laying the foundations for EOSC Future’s co-design activities and creating awareness of EOSC Future’s plans and ambitions (M1-M8).
- **Pillar 2** – engaging EOSC users in co-design activities (M8-M30).
- **Pillar 3** – broadening the EOSC user base (M8-M30).

3.3.1 Laying the Foundations

The first eight months of the EOSC Future project will be dedicated to setting up the engagement mechanisms that will be used throughout the project. The WP10 will synchronise activities and will agree on engagement plans with the EOSC Future consortium partners as well as with external initiatives. It will also raise awareness of EOSC Future plans and ambitions in the community.

Main engagement activities

Table 3-2 Main activities for awareness- raising

- onboarding at least 200 researchers via the User Group (see 3.4.1) who can act as an “EOSC user-panel” to provide inputs on requirements, potentially test the solutions developed and become EOSC champions at their institutions or in their communities, leveraging on the consortium and EU networks.
- establishing a joint engagement plan with the INFRAEOSC-07 projects, EOSC Enhance and the new EOSC-related projects funded under the Horizon Europe calls 2021-2022.
- setting up monitoring mechanisms to track the communities engaged in EOSC and identify gaps – this work will build on the outcomes of the EOSC-Hub project [1] and RDA4EOSC co-creation [2].
- mobilising the EOSC community through the launch of a call for Working Groups to co-design the EOSC architecture and interoperability framework – this work will complement the work of the EOSC Association Task Forces to make sure that all the relevant technical EOSC topics are addressed with the support of the whole EOSC community.
- setting up the framework for the RDA and DIH calls.
- creating awareness of the EOSC Future plans and ambitions:
 - organising the EOSC Future online presence (EOSC Future website and social media) and taking over the EOSC Portal communication management.
 - organising of an EOSC Future session at the EOSC Symposium 2021 and 2022.
 - organising a one-day EOSC Future open day / roadshow (early December 2021).
 - presenting EOSC Future at major events (e.g. Open Science FAIR, ESFRI days, etc.).

3.3.2 Engaging EOSC users in the co-design activities

EOSC Future’s co-design activities will revolve around three main areas of activities:

1. consultation with experts on the EOSC Architecture and Interoperability Framework.
2. requirements gathering from EOSC users on the EOSC Future solutions.
3. feedback provision from EOSC users on the EOSC Future solutions.

Main engagement activities

Table 3-3 Main activities for co-design

Consultation with experts on the EOSC architecture and interoperability framework:

- continuous recruiting of EOSC Future Working Group members to ensure that the project gets the right expertise on board to reach out; to make sure the largest possible number of experts identified by the facilitators (explained in chapter 2) will be leveraged.
- launch of dedicated RDA Open Calls supporting the co-design of EOSC solutions, specifically those dedicated to the identification of interoperability solutions as well as discipline- and domain-specific support through communities of practice and ambassadors.
- organisation of consultations with the community via the EOSC Portal website and Liaison Platform to collect feedback on the outputs of the EOSC Future six-month Working Groups.
- liaison with the EOSC Association to ensure that the results of the EOSC Future Working Groups are aligned with EOSC's overall mission and complement the work performed by the EOSC Association Advisory Groups (ad-hoc meetings will be organised with the EOSC Association about the progress and outcomes of the EOSC Future Working Groups).
- organisation of an annual EOSC Future Consultation Day ((February 2022/ October 2022, in conjunction with the Symposium), March 2023, September 2023 (in conjunction with the Symposium)) – one-day workshop to discuss intermediate results of the EOSC Future Working Groups.

Requirements and feedback gathering from EOSC users on the EOSC Future solutions

Participants of the User Group will be asked to:

- complete of four or five short surveys between October 2021 and September 2023.
- participate in focus groups to provide input on upcoming EOSC Future developments, twice yearly during approximately two-hour online meetings between October 2021 and September 2023. This gives EOSC Future User Group participants the opportunity to also contribute to the ongoing efforts in their scientific community.
- participate in two EOSC Future testbed sessions organised between October 2021 and September 2023 to test EOSC Future solutions before they are rolled out and provide feedback.

The main topics covered will be:

- requirements for and feedback on the EOSC-Core - WP4 (M7-20).
- requirements for and feedback on the EOSC Portal front-end - WP5 (M7-20).
- requirements for commercial cloud demand - WP6/WP8 (M2-6).
- requirements for and feedback on the EOSC Future Knowledge Hub - WP9 (M7-20).

3.3.3 Widening the EOSC User Base and Promoting Uptake

Main engagement activities

Table 3-4 Main activities for widening the user base and promoting uptake

To meet the objective for widening the provider base, the target will be to:

- develop an EOSC provider toolkit (why become an EOSC provider, how to become an EOSC provider).
- document of onboarding success stories from the integration of the INFRAEOSC-07 projects, the EOSC Science Clusters and WP8's commercial providers through interviews and testimonies.
- organise of two EOSC Future resource providers days / clinics, with half a day focussing on policy and half a day on technical issues.
- organise of a targeted workshop with the regional projects to promote the onboarding of national services (September 2021).

- two main campaigns to onboard new providers via the five regional projects, national multipliers (NGIs, NRENS, NOADs), EOSC national initiatives, etc.
- provide capacity building training for the service providers in the Western Balkans organised in collaboration with NI4OS-Europe project.

To broaden the consumer base and increasing uptake, it is aimed to:

- organise engagement activities with the INFRAEOSC-07 projects and new stakeholders outside of the current EOSC Ecosystem:
 - joint events.
 - a coordinated calendar of complementary Open Calls.
 - joint training and promotion webinars on how to use the EOSC services.
 - a joint hackathon or summer school – June 2022.
- organise eight to ten informal one-hour ask-me-anything sessions with one main presentation and interactive discussion about specific EOSC Future services, such as topical sessions, thematic session or sessions focussing on INFRAEOSC 07.
- organise the RDA Open Calls to support scientific and research communities' involvement in EOSC.
- organise the 2022 and 2023 EOSC Symposium events in collaboration with EOSC Association (October 2022, September 2023).
- promote the Science Projects' challenges and early results:
 - to onboard communities with similar challenges through individual meetings organised with the identified communities.
 - to broaden the adoption of the Science Projects' results in the related cluster communities via info sharing sessions attached to the main clusters events.
- document the results of the DIH for business pilots, promoting them at industry events.
- run campaigns to boost EOSC's uptake.
- organise two four-hour "Refer a Researcher" workshops for 40/50 researchers not yet involved in EOSC explaining EOSC's mission and collecting expectations without entering into the details of the current developments – through EURODOC, YERUN, EUA, other networks (May 22/May 23).
- reach out to research communities underrepresented in EOSC.
 - increase the engagement of domains and disciplines are unaware of, uninterested in or underprepared to engage in EOSC.
 - This activity will therefore leverage the experience of Research Infrastructures and e-Infrastructures as well as best practices matured in WP6, INFRAEOSC-07 projects and beyond to support the promotion of readiness and awareness of those science and research communities that are not included in ESFRI.
 - For the purposes of this activity, scientific and research communities will be classified according to a traffic-light system of three levels of interaction with EOSC:
 - ◆ Green means aware, ready and prepared, e.g. EU-funded Research Infrastructures.
 - ◆ Orange means aware but not ready or ready but not aware.
 - ◆ Red means unaware and unprepared.
 - This work will build on the results of a preliminary analysis of a set of research and science communities entitled "Supporting the engagement of disciplinary research communities with the European Open Science Cloud" [4].
 - RDA will use the Open Call mechanism (managed via T1.5) to support engagement with a broad spectrum of scientific communities. RDA will use its global community and platform to support these communities, offering them a place to discuss their data requirements, interact with the global community and leverage the RDA expertise and network. At the same time, RDA will support these communities in understanding and preparing for EOSC:
 - ◆ Outputs include two reports mapping the research communities' level of interaction, tailored events, best practices, toolkits, and info packs for all scientific communities covered, as well as a disciplinary ambassador network.
- host six specific info sharing sessions for universities, libraries, citizen scientists.

- increase EOSC’s presence in the Eastern and Western Balkans:
 - organise two events targeted specifically at the Western Balkan region. The focus of these events will be the engagement of stakeholders in the region and the development of the necessary skills on their path to participating in EOSC. The events will target the end-users of generic and thematic services and data repositories in Western Balkans. GRNET and UKIM, in collaboration with NI4OS Europe project, have direct contacts in the user communities in 15 Member States and Associated Countries in Southeast Europe (SEE). The events will also aim to engage and enhance FAIR and EOSC capabilities for current and potential European Open Science Cloud stakeholders in the Western Balkans, ensuring their smooth introduction into the EOSC.
 - a first event targeted specifically at the Western Balkans will be the 2021 SEE User Event, which will take place on 3 - 4 November 2021 and will be co-organised by GÉANT, NI4OS-Europe and EOSC Future. This event will bring together users in the SEE region and customers of the regional NRENs to familiarise them with all the possibilities offered by the Open Science Cloud.
 - another major regional SEE event, including Western Balkans, to be co-organised by GRNET and UKIM in collaboration with NI4OS-Europe and OpenAIRE by the end of 2022.
 - GRNET and UKIM will promote EOSC Future in the upcoming NI4OS-Europe training and dissemination events for the potential EOSC Future end-user communities in Western Balkan countries.
 - EGI will further liaise with the countries in Eastern Balkan by connecting the Black Sea University Network to EOSCengage with commercial companies - more details on the engagement plan for commercial players to be outlined by WP8.

3.4 Key Engagement Mechanisms

3.4.1 EOSC Future User Group

In addition to the requirements and feedback gathering mechanisms within the consortium (requirements from public and commercial resource providers and clusters, WP4, WP5, WP6, WP7, WP8), the main instrument to collect external requirements and feedback will be the EOSC Future User Group [3].

Through the EOSC Future User Group, EOSC Future wants to engage and onboard a pool of diverse EOSC users representing their scientific area with different backgrounds and career stages. It will provide input and feedback on four or five surveys on the solutions developed by the project and will promote outputs for the duration of the project, from October 2021 until September 2023. The User Group will consist of at least 200 representatives from all scientific areas. They will support the project in co-designing and validating upcoming EOSC services and products at the user level.

The EOSC Future User Group’s members will help outline the direction for future EOSC services, strengthening EOSC’s benefits for researchers’ everyday work. As representatives of their research communities and the user stakeholders they represent, they will have the opportunity to influence EOSC’s implementation.

The selected user representatives are expected to:

- participate in focus groups twice-yearly during approximately two-hour online meetings
These focus groups will include active participants in the EOSC Future Science Projects. This gives EOSC Future User Group participants the opportunity to also contribute to the ongoing efforts in their scientific community.
- participate in two EOSC Future testbeds, with two testbed sessions organised between October 2021 and September 2023 to test EOSC Future solutions before they are rolled out and provide feedback.

The User Group will be composed of individuals with different research perspectives, backgrounds, and seniority. It will prioritise active researchers, who should make up at least 50% of selected applicants. The User

Group will engage applicants from all research fields and disciplines, at various career stages. It will also consider geographical distribution and gender balance in the selection process. It will aim to include representatives from all European Union Member States and Associated Countries. Applications from other continents will be considered on a case-by-case basis. Applications from inter- and cross-disciplinary researchers are especially encouraged to apply. Staff working on the EOSC Future project i.e. directly funded through a beneficiary, with its department or unit executing EOSC Future activities, as an LTP or as seconded personnel are not eligible to apply.

More information is available on the EOSC Portal [5].

3.4.2 EOSC Future Open Calls

3.4.2.1 RDA Open Calls

As part of EOSC Future's engagement activities, RDA will be running a set of open calls to enable the co-creation of EOSC. These calls will focus on early adoption, technical and domain solution development, and interoperability.

The RDA Open Calls mechanism - with a 1M€ grant fund - will be used to engage with multiple stakeholders, including, targeted scientific communities, technical experts, and early career researchers. It will be complemented by a series of activities on different channels, such as events, use cases, info packages, and best practices. The RDA Open Calls will be further strengthened through the creation of a Scientific Ambassador Network and dedicated RDA groups. This will lead to a continual innovation workflow and engagement with science projects to support the implementation of EOSC.

The Open Calls will specifically include:

- calls focused on scientific discipline- and domain-specific support for individuals and organisations not engaged with RDA and/or covered by the EOSC Cluster Projects involved in the EOSC Portal, e.g. early career programmes, RDA Recommendation and Adoption Grants, technical expert support, ambassadors, events and workshops to raise awareness of EOSC and RDA.
- calls for individuals and organisations focused on RDA recommendation maintenance and technical support – to provide continuity and support to stakeholders for the technical implementation of EOSC, including the RDA working group members responsible for the recommendations in question. A series of calls will be issued to contract specific technical expertise to generate and deliver documentation, maintain the versions and technical instances of the recommendations on the RDA website, etc. Where necessary, these calls may also cover the expertise required to support the approval of RDA recommendations as ICT technical specifications or standards.

The RDA Open Call is governed by the Annex K for Horizon 2020 EU-funded grants). This means that the calls must:

- be published widely and adhere to Horizon 2020 standards for transparency, equal treatment, conflict of interest and confidentiality.
- be published on the Horizon 2020 Programme page of the Funding and Tenders Portal, and on the EOSC Future's own website.
- remain open for at least two months.
- immediately announce deadline changes on the call page on the Funding and Tenders Portal, informing all registered applicants informed of change.
- publish call outcomes, including a description of third-party action, the awarding date, duration, and the legal name and country of the recipients.
- have a clear European dimension.

Applications will be evaluated by three external experts, respecting confidentiality, and conflict of interest clauses. The EOSC Future Grant Committee will oversee the procedures, processes, and selection of applications. A full overview of types of RDA Calls is available in Appendix A.

3.4.2.2 EOSC DIH Business Pilots

EOSC's Digital Innovation Hub (DIH) [6] is an international and multi-partner collaboration. The aim of the EOSC DIH Business Pilots is to stimulate innovation activities within private companies and through services [7] offered by DIH and public sector. It supports private companies to easily provide services to the EOSC community, making use of access to digital technologies, services and human capital provided by the EOSC.

It rests on four pillars to help companies become more competitive:

1. **piloting and co-design** – where products or services are designed and/or tested.
2. **technical access** – high-throughput, high-performance and cloud computing; machine learning; research data; data management services and several tools and applications available for re-use.
3. **training and support** – technical consultancy, business coaching and funding search.
4. **visibility** – inclusion of company solutions in EOSC, print and online material and exploitation of EOSC networking and ecosystem opportunities, such as online communities, event attendance and potential future projects

Pilots consist of dedicated use cases with a 7- to 8-month duration, which are executed within the scope of pre-commercial testing, validation, experiments, or proof of concepts using the EOSC services. The pilots shall clearly state the expected business impact and exploitation for the companies involved.

3.4.3 Direct support to individuals

EOSC users can reach out to the EOSC Future project also via the EOSC Portal Helpdesk [8]. Recurring questions on this channel include:

- I am a researcher in country X, discipline Y, project Z. I need to deposit/share some research data. Where can I do that?
- I need a cloud server to do some experimentation or to run a service. Can EOSC provide this?

EOSC's generic support unit will address these requests and will use them to trigger discussions with potential new leads. It will also compile specific FAQs or contact topical lists for questions, e.g. on computing, data deposition, complex data management set-ups, policies, licenses, metadata, national data repositories, etc. The project will discuss whether relevant requests for support will be linked to INFRAEOSC-07 helpdesks.

3.4.4 Collaboration with Other Projects and Initiatives

EOSC Future is one of the main projects steering the development of EOSC. Therefore, it is of paramount importance that the project maintains close links with the ongoing EOSC-related projects and collaborates with them on an ongoing basis (eg. through Collaboration Agreements, MoUs etc). Such collaboration will avoid overlaps in activities and leverage the networks already established by the other projects with the most relevant EOSC-related initiatives.

Finally, close ties with **other EOSC projects** will be fostered. EOSC Future editorial calendar will be shared with them and a list of contacts will be compiled for all projects to reach out to projects directly. They will also be routinely tagged in EOSC Future's social media posts.

The most relevant projects currently identified, and the main scope of the collaboration have been included in Appendix B.

3.4.5 Events

Events will be one of the main tools to stimulate engagement. The project will make sure to maintain a balance between virtual and in-person events. If the COVID restrictions persist, only virtual formats will be foreseen.

At the time of writing, the following events have been planned. The timeline is indicative, as some of these events might be rescheduled to coincide with other relevant events or specific requests of the EOSC Association.

Table 3-5 Planned events

Event name	When/How	Main purpose and target audience
EOSC Future public launch	October 2021 (virtual)	to present the plans and ambitions of the EOSC Future project and present the results of the first milestone of the EOSC Future technical roadmap
EOSC Future meets the regional projects	September 2021 (virtual)	four-hours workshop to discuss collaboration activities with the regional projects and to promote onboarding of national services
EOSC Future co-organised 2021 SEE Forum	3-4 November 2021 (virtual)	the event, jointly hosted by GÉANT, NI4OS-Europe and EOSC Future, will provide a forum where users and researchers will share their own experiences. Southeast Europe (SEE) regional stakeholders are coming together to raise awareness about the EOSC services, engage the community and present all the possibilities available to their end-users in the arena of Open Science Cloud.
EOSC Future Consultation days	February 2022 October 2022 (in conjunction with the Symposium) March 2023 September 2023 (in conjunction with the Symposium) (virtual/ in-person)	One-day workshop to discuss intermediate results of the EOSC Future Working Groups and collect feedback and input from the community
EOSC Future Resource Providers Days	April 2022 May 2023 (virtual/in-person)	one-day workshop to encourage resource providers to join the EOSC and explain how to and showcase success stories
EOSC future Meeting @RDA Plenary	Nov 2021 (virtual) Nov 2022 (in-person) Oct 2023 (Salzburg)	coordination of and collaboration with global open research commons meetings
Joint Hackathon / Summer school between EOSC future / INFREOSCo7	June 2022 (in-person)	four-day bootcamp on EOSC services / hackathon challenge to encourage uptake of EOSC resources
EOSC Symposium 2022 / 2023	October 2022 September 2023 (in-person)	one-week event to mobilise and engage the EOSC community to coincide with a one-day dedicated to the EOSC Association

In addition to these events the project partners will ensure the promotion and dissemination of the EOSC Future results at relevant events and conferences.

3.4.6 Science Projects

The EOSC Future project is leveraging the Science Projects to increase the adoption of the EOSC results in related Cluster communities via info sharing sessions attached to the main Clusters events. To achieve this goal, it will rely on the Clusters' dissemination networks, for example Photons and Neutrons (PaN), the dissemination channels developed by ExPaNDS and PaNOSC, covering 16 major FELs, synchrotrons and neutron sources in Europe.

The Science Projects will allow EOSC Future to engage with scientists, involving them in co-creation. EOSC Future does not just consider scientists as an outreach audience but as genuine participants in the research process since they play an active role in data classification and collection. Engagement activities will therefore consist of two-way dialogue and debate through online forums staffed by professional research scientists.

EOSC Future has access to a wide range of interdisciplinary experts and scientific audiences, who might not all have considered contributing to citizen science before. As an example, the ESCAPE Science Projects already plan to include citizen science. EOSC Future aims at facilitating citizen science by providing access to research data and services. EOSC Future also aims at helping promote best practices in crowdsourced scientific and social-scientific data classification, transcription, and collection in a larger number of multi-disciplinary and interdisciplinary communities.

3.4.7 Multipliers and Partners' Network

One of the critical pillars of the EOSC Future engagement is the activation of multipliers within and outside the consortium. These engagement activities can be divided into three different tiers:

1. consortium channels.
2. other EOSC projects past and present.
3. engaging existing consortium network.
4. engaging new partners and networks.

Throughout EOSC Future's duration, consortium members will be asked to disseminate the project's outcomes and initiatives via their **organisation's own channels**, i.e. newsletters, magazines, annual events, webinars, news sections and social media. Consortium members will be encouraged to participate in low-effort activities such as social media posts or newsletter items and more significant engagement via news items, interviews, or joint events. The WP10 will maintain close contacts with consortium organisations' communication offices, either directly or through EOSC consortium members.

In addition, consortium partners will be asked to reach out to **their own network** of organisations and people that can be engaged to act as project multipliers. Specific activities will be focused on identifying different categories of multipliers and the overall impact is tracked through the project KPIs. This form of multiplication will be especially impactful for those organisations that bring together a broader group of members, such as OpenAIRE, GÉANT, the EGI Federation, EUDAT, RDA and the broad networks of the EOSC Science Clusters. All organisations in the consortium, however, are well-established in the research, open data, or e-Infrastructure communities and can reach large numbers of organisations and people. Special attention will be given to efforts to engage the existing networks in underrepresented regions, with a focus on the Western Balkans, for instance, by GRNET, UKIM and OpenAIRE.

WP10 and the broader consortium will make efforts to **engage organisations and people outside the consortium's existing network** to act as multipliers. These organisations will be encouraged to share EOSC Future materials via their channels. The WP10 will also explore possibilities to set up more extensive collaboration with key organisations, such as the International Network of Open Science and Scholarship Communities (INOSC), Science Europe, EUA or LERU and other RPO umbrella organisations.

Multiplier and partner initiatives will be supported by Task 10.3, which will:

- coordinate the effort to get a comprehensive overview of:
 - existing consortium channels.

- existing consortium network.
- compile an extensive list of additional organisations and individuals to reach out to.
- provide ready-made materials for consortium members and new multipliers to communicate about EOSC Future’s activities and
- (together with other WP10 partners) set up meetings for more extensive collaboration with these organisations.

To respect the GDPR, email addresses for these contacts will not be shared. Instead, the contact “owners” will be asked to share the materials via email. All multipliers will be asked to help spread the word about specific EOSC Future activities. They will be supported in doing so through toolkits with ready-made materials.

4 EOSC Future Communication Strategy and Plan

The engagement activities described in the previous chapters will be supported by the EOSC Future communication and marketing strategy driven by T10.3. The main communication activities will consist of:

- creating communication support materials to promote engagement activities.
- ensuring visibility for EOSC Future through ongoing editorial and social media activities.
- running targeted marketing campaigns on social media to broaden the EOSC user base.

Across these activities, the main goal of EOSC Future’s communication efforts will be to encourage further uptake of EOSC resources and outputs, both by users and providers. At the same time, the project’s communications should provide updates about the projects’ actions and results.

Table 4-1 Main communication objectives

Primary objective - **dissemination and exploitation**: encourage uptake of EOSC resources:

1. Broadening the user base
2. Growing a pool of resource and service providers

Secondary objective - **communication** about the project’s actions and results.

Tertiary Objective - **awareness and understanding** of the EOSC.

Communication actions will always be tailored to the specific target audiences outlined under Chapter 2. All outputs will thus avoid over-emphasising process or project-internal organisation (e.g. references to WPs, which only those in the project know). Instead, the WP10 will adopt messaging and framing that focuses on audience needs and interest: why EOSC Future’s activities and outputs are helpful for them.

4.1 Strategic Principles

4.1.1 Maturing Audiences — The Marketing Funnel

All major communication actions will be structured around the *marketing funnel* principle. This funnel illustrates the journey an audience member takes from first hearing about EOSC (Future) to *converting*, i.e. taking the desired action. It tries to have audience members move *awareness* through *consideration* and *decision* to *advocacy*:

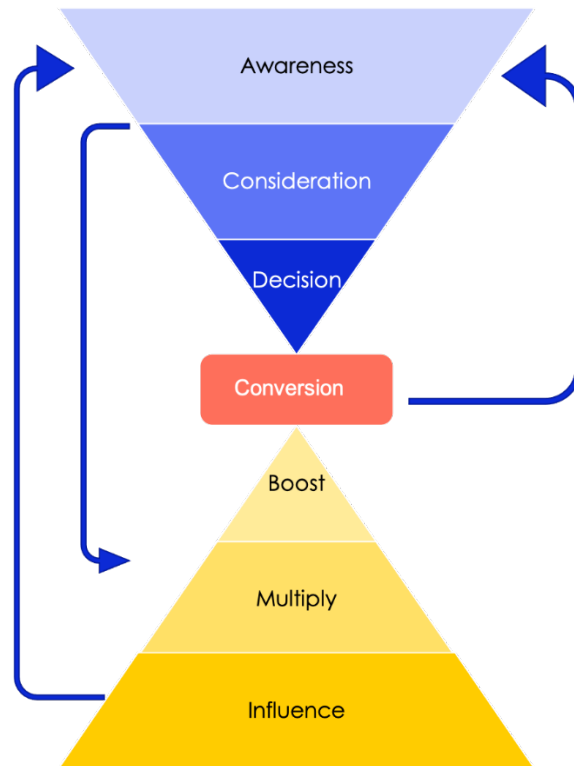


Figure 4.1 Marketing funnel

- **awareness** – an audience member first comes into contact with EOSC (Future) and takes a superficial interest.
- **consideration** – an audience member has taken an interest in EOSC (Future) and starts engaging more with its content and starts consuming more in-depth content.
- **decision** – an audience member is ready to act (to use EOSC services, to reply to a call, to start offering services etc).
- **advocacy** – once an audience member converts, they can help boost or multiply our message or influence others.

At the starting point, different audience members are at different places in the funnel. Some of them are already in the know about EOSC and ready for conversion; others are not. The conversion process will have different speeds depending on an audience member's pre-existing issue involvement, i.e. some audience members might be unaware of EOSC but already attuned to open data or the possibility of good research data management, while others might not believe EOSC has that much to offer to them. The latter will take far longer to convince.

Audience members for each of these segments will be tracked in accordance with the GDPR. Analytics insights will be complemented with the results of Activity 10.2.1. This task will classify scientific and research communities according to a traffic light system of three levels of interaction with EOSC. These levels can be mapped to the marketing funnel, with red, orange, green mapping to awareness, consideration, and decision, respectively. This activity will be performed in collaboration with Wp5 Task 5.4.

EOSC Future's main purpose is working towards different types of conversion. The major among those are:

- a user signs up to the platform.
- a user becomes a test user.
- a user becomes a trainer.
- a provider includes data or services in the platform.

This will be most readily accomplished by targeting the decision segment of the funnel. However, it is important to address the less mature segments of the funnel to ensure EOSC long-term sustainability. Accordingly, EOSC Future's communication team will:

- ensure that content is produced for different segments of the funnel.
- monitor the relative size of the different audience segments, especially the conversion rate (which should remain relatively stable).

Insights from funnel-based monitoring will also be used to prioritise campaign audiences and objectives. For instance, since website analytics can be filtered per country and the EOSC Portal (and future platform) collects information on which disciplines users belong to, the communications team could:

- devise a conversion campaign that targets the most represented disciplines in the most represented countries (depending on available data).
- devise an engagement/consideration campaign for underrepresented disciplines in the most represented countries or the most represented disciplines in countries in the middle of the pack campaign that targets the most represented disciplines in the most represented countries (depending on available data).
- devise an awareness campaign for the most represented disciplines in countries that lag behind (including the Western Balkans that this project is explicitly targeting).
- decide not to target a campaign specifically at underrepresented disciplines in countries that lag behind, arguing that that segment is not ready to engage with EOSC yet.

Alternatively, for conversion objectives that have a constricted timeframe (such as funding opportunities, funnel insights can help determine which audiences to target through paid promotion effectively and which audiences are still too immature (e.g. for calls).

4.1.2 Structuring Activities — The Engagement Triangle

While the marketing funnel helps to structure which content should be targeted at, the engagement triangle helps to structure which types of content are needed.

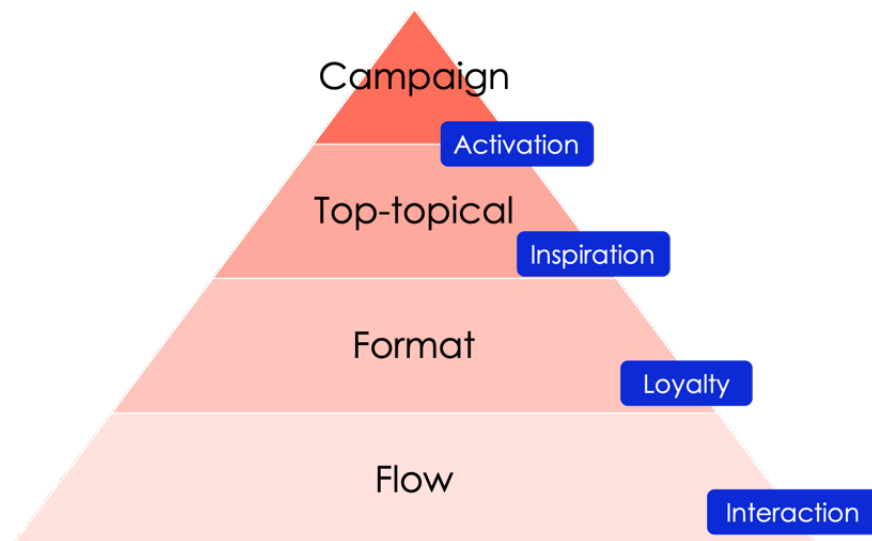


Figure 4.2 Engagement triangle

- **campaign** – The top of the pyramid is formed by (paid) campaigns to attract or activate an audience. Much of the communication strategy for the project revolves around growing the EOSC user base. So, from month 6, the communications team aims to run at least one campaign each month, excepting July and August, which are slow months on social media. From the start, the campaigns will try to strike a balance between awareness, engagement, and conversion, mapped to the marketing funnel illustrated in the previous segment. However, engagement and conversion will take on a more prominent role as more functionalities of the EOSC become available. In addition, a budget will be foreseen for ad hoc paid posts; for instance, for calls that are not finding their audience, events, etc.

- **top-topical** – The second level of the engagement triangle is top topical communication. This refers to engagements via external hooks, such as events, awards, or special *days* such as Open Data Day. The communication team will compile and update an overview of external hooks, with an emphasis on events by organisations in the EOSC community.
- **format** – Format is used to enhance loyalty among audience members, by communicating consistently and preferably at a fixed interval. The communications team will ensure that specific types of content will be posted at regular intervals:
 - **on social media**, monthly updates:
 - an overview of upcoming events.
 - an overview of new functionalities on the platform.
 - an overview of all open calls.
 - an update of project deliverables and outputs.
 - **on the websites**, bi-weekly articles.
 - **monthly newsletter** (from EOSC Portal).
- **flow** – The basis of the pyramid is formed by the routine, daily interactions with the audience: liking, sharing, moderating discussions, and growing an online community around EOSC (Future).

4.2 Communication Tools and Channels

Where possible, communications for EOSC Future will rely on established channels from related EOSC projects, most notably EOSC Enhance. This way, the project will avoid further fragmenting the EOSC audience and will not have to build its audience from scratch. New channels will be created to:

- disseminate EOSC Future-specific project information (deliverables, progress etc).
- communicate those parts of EOSC Future that are broader than the EOSC Portal.

4.2.1 Websites

EOSC Future will rely mainly on four so-called *owned* or partially owned website channels, on which the project has (partial) editorial control:

- **The existing EOSC Portal website** [9], which will post information related to the creation of a fully functioning EOSC Portal, including the training Knowledge Hub, the Policy Observatory, and the User Registry. It will be the main platform for the promotion of the EOSC Core services and developments.
- **The EOSC Future project website** [10], which will provide updates on the project’s progress and will host the project’s deliverables and main outputs (Launch: M6)
- **The EOSC Future Grants Platform** [11], which will host all information related to the grants provided through EOSC Future while streamlining their allocation (this information will also be shared on the websites of RDA and DIH)
- **An EOSC Future wiki** [12], which will mainly host user documentation

The content of the above websites will be developed by an editorial board described in chapter 4.4.2 and coordinated by the Wp 10 Task 10.3 leader.

In general, the content will be divided between the different websites as indicated in the table below. For more ad hoc content, the editorial board will decide where this content is best to be hosted. The editorial board will then update the table below to ensure consistency for the duration of the project.

Table 4-2 Content division across websites

Portal	Project website	Grants Platform	Wiki
Always shared	Always shared	Grant announcements	
Shared	Shared	Announcements of grant allocations and other information related to the grants	

Linked	Linked		User documentation
Project updates	Shared when relevant to give more visibility to the project		
Updates from WP6's mission-oriented science projects	Shared when relevant to give more visibility to the project		
Shared	EOSC in Practice Stories		
Shared	Policy materials		
Shared	Training materials		
Shared	User Registry		
EOSC Future Events	Shared		
EOSC Future Serious Game	Shared		
Communication toolkits			

In sharing information between websites, the communication team will avoid copy-pasting information and will make sure to foresee minimal re-writes of content to safeguard the search engine ranking of all websites. This is especially important for the EOSC Portal, which will likely persist after the end of the project.

4.2.2 Social Media

EOSC Future will have a solid presence on social media, both on owned channels and related EOSC Channels. It will share an editorial calendar with the communication teams from other EOSC projects and will try to establish close links with the EOSC Association's communication teams as well as Commission channels. Since EOSC largely addresses a professional audience, it will prioritise channels that favour professional communications, namely **LinkedIn and Twitter**.

Table 4-3 Main social media accounts

	EOSC Future	EOSC Enhance	EOSC Secretariat	EOSC Association
LinkedIn	x		x	
Twitter	x	x	x	x

Video materials for EOSC Future will be hosted on the **EOSC Portal YouTube channel**. While YouTube can be used as a truly *social* medium for some types of content, EOSC Future will mainly use it as a hosting platform. This would allow for easy integration and promotion of video via other channels, mainly websites and social.

After the conclusion of the EOSC Enhance project, the EOSC Future team will take over the management of the EOSC Enhance social media channels as well as the EOSC Portal YouTube Channel.

In addition to the regularly scheduled posts on social media the communications team will also run targeted **paid promotions** to broaden the EOSC user base. Such promotions will allow the project to:

- increase knowledge and uptake of EOSC (Future) services and tools, especially with audiences that the project cannot organically reach through existing networks.

- target specific audiences with very specific messages, for instance, researchers in a specific discipline, in a specific region or country.
- offer an extra push for calls that are receiving few or undiverse publications (e.g. only from Western European applicants).

The WP 10 Task 10.3 leader has ample experience running such online promotions for audiences across Europe, successfully targeting niche interest fields and geographic areas.

At this early stage, the WP 10 Task 10.3 team foresees to run promotions on the following channels:

- **Twitter** - the main channel for paid promotion. Twitter offers comprehensive targeting tools to effectively reach niche audiences in specific geographic areas. Campaigns will be run throughout the project, with a shifting focus from awareness of EOSC (Future) to the use of its products and services. Specific campaigns will be run around the M6, M18 and M30 launches, the EOSC Symposium and - when needed - to support EOSC Future calls.
- **LinkedIn** – While this platform is considerably more expensive, and its targeting is mainly optimised for finding suitable candidates for a job. However, LinkedIn could be used to reach very specific audiences for any underperforming EOSC Future calls to target specific academic disciplines, level of experience and (through proxies) pre-existing levels of interest in topics related to EOSC.

In addition to promotions on social media, the project could also have a running ad via the Google Display Network. This means that EOSC Future would buy up specific google search strings, to be featured as a top result for research audiences in Europe.

4.2.3 Newsletter

The EOSC Future project will not have its own newsletter but will disseminate its updates through the EOSC Portal newsletter, which already has an established user base. Until the end of the EOSC Enhance project, it will provide its inputs to the EOSC Enhance project team currently running the newsletter. Afterwards, it will take over the management of the newsletter.

For now, newsletter subscribers are largely core members of the EOSC community, who have pre-existing knowledge of EOSC projects. Thus, the newsletter currently includes information about technical advances, governance, upcoming events, etc. As the user base starts growing, however, the communications team foresees shifting the content in the newsletter to include more information directly targeted at (potential) users. This would include announcements of new features, focusing on how they are helpful to researchers, training events and other activities aimed at users.

The EOSC Enhance team currently sends a monthly EOSC Portal newsletter. EOSC Future will maintain this frequency after the end of EOSC Enhance, sending out a newsletter every second week of the month. The communication team might use the list to send out a second email in the fourth week of the month to provide an extra promotional push in the lead-up to the EOSC Symposium or other important events.

4.2.4 Events

EOSC Future will create visibility for the project and EOSC by securing speaking slots at key scientific, industry and policy events and conferences in Europe to promote EOSC resources and latest developments.

In addition, the project will be hosting its own events, training sessions and webinars, as described in chapter 2. This includes the organisation of the 2022 and 2023 EOSC Symposium. At the EOSC Symposium stakeholders can directly interact with the EOSC Governance, provide their feedback on EOSC latest developments, and showcase how they are contributing to and benefitting to and from EOSC. As the project looks to onboard more end-users, part of the EOSC Symposium should focus on growing the user base through dedicated sessions for (potential) users and trainers.

4.2.5 Media

Media is not a major promotion channel for EOSC Future. Still, the WP10 Task 10.3 team will monitor the project's activities to identify opportunities for press coverage, mainly in specialised publications. At this early stage, the communications team foresees the following media activities:

- Outreach to specialised publications for the M6, M18 and M30 releases.
- Outreach to specialised (and more general) publications around the outcomes of the science test projects, focusing on the societal benefits of the projects, with the secondary message of the opportunities of (open) research data for leading-edge research.
- Potentially - opinion pieces in specialised press on topics where EOSC services can have a significant impact (open research, FAIR science, reproducibility of research etc.).

4.2.6 Multipliers

Throughout the project's run, the communication strategy will rely heavily on so-called *multiplier* activities. The communication team will look to boost communication messages through a network of "multipliers" that already communicate to the target audiences.

The project foresees multiplication through four tiers of multipliers:

- The consortium – on their organisations' channels.
- Other EOSC projects past and present – mainly on social media.
- The consortium's network – organisations that different members of the consortium are already in touch with and who the consortium members can ask to spread the work.
- An extended multiplier mapping – the WP10 team will create a mapping of other relevant organisations that hold sway with our target audiences. The mapping will especially focus on gaps in the consortium's existing networks.

For a more detailed description of multiplier actions, see 3.4.7.

4.3 Types of content

This section outlines the main types of content that will be produced by the communication team and the channels that they will be disseminated on. EOSC Future's content production can broadly be grouped into four categories:

- **editorial**
 - news items/Blogs for the different websites, including the EOSC in Practice stories.
 - learning materials for the Knowledge Hub and User Wiki.
 - policy materials for the Policy Observatory.
 - press release materials.
 - social media posts.
 - promotional materials for events.
 - ad copy.
- **video**
 - longer videos – as an alternative to editorial materials to provide alternative formats to meet different user preferences; produced in landscape format.
 - longer content items for the different websites (e.g. interviews with experts).
 - explainer videos for the Knowledge Hub, different websites, and the User Wiki.
 - event recordings.
 - shorter videos – which work well on social media, especially for sponsored campaigns; produced in square format for easier use on social.
 - 20- to 30-second animated videos, including short, animated infographics.
 - 30-second to 1-minute videos of videos with text overlays.
 - GIFs.

Where possible, videos will be made accessible by including subtitles. For longer videos (especially event recordings) these subtitles might be automatically generated. All video for social media will be subtitled, since many users consume social media content without sound

- **visuals**
Communication for EOSC Future should be visually appealing. The team foresees preparing especially the following materials:
 - ad hoc illustrations.
 - Infographics.
 - project progress, including the mission-oriented science projects.
 - user statistics.
 - ways data can be used.
 - social media banners.
 - ready-made presentations.
 - ad-hoc branded materials.

- **serious game** – The communication team foresees to develop a serious game on open data exchange, discovery and re-use that can serve as an external marketing hook. The game will be hosted on the EOSC Future website and promoted through the various EOSC Future channels. It can also be played at events to make the stakes and goals of an EOSC more tangible.

The different types of content would be distributed across channels as follows:

Table 4-4 Types of content

	Editorial	Video	Visuals	Serious game
Website	blogs news items policy materials learning materials	explainer videos interviews event recordings	infographics illustrations	hosting
Social media	social media posts	short animations 30-second to 1-minute videos GIFs explainer videos	illustrations social media banners	promotion
Newsletter	newsletter items			promotion
Events	promotional materials programme materials	event promo video event summary videos	presentations branded materials	playing promotion
Ads	ad copy	promo video	illustration	promotion
Media	press releases opinion pieces			
Multipliers	newsletter items	explainer videos	social media banners	

(bundled in toolkits, often based on pre-existing materials)	blog news items	short animations 30 second- 1- minute videos GIFs	infographics ready-made presentations	
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4.3.1 Messaging

Since the project has so many moving parts, it will be difficult to keep messaging consistent across all platforms and all consortium organisations. Rather than force a limited set of messages on the consortium that will end up being too restrictive (and thus less likely to be applied), we will simply provide the guidance that communications:

- need to be audience-centric, focusing not on everything that we would like an audience to know but leading with the information that is important in their decision-making process.
- need to address the different levels of the funnel (except for those that only target specific levels of the funnel, e.g. calls or events).

For **users or providers**, a messaging matrix might look like this:

- awareness
 - Why data? The benefits of a structural approach to research data?
 - can support reproducibility of (your) research
 - can break down silos between disciplines
 - can increase your impact (through the impact of your data sets)
 - new methods can bring novel, leading-edge insights
 - ... (to be tailored to a specific audience, e.g. discipline or region)
 - Why EOSC? The benefits of a European Open Science Cloud
 - European research fit for the digital age!
 - better circulation, diffusion, and uptake of European research
 - FAIR principles
 - ...
- consideration
 - Why EOSC this way? The benefits of EOSC the way it is done
 - users
 - ◆ easy access to diverse data sources
 - ◆ store, share and process your data in one place
 - ◆ a one-stop shop for data services
 - ◆ find data that can be recomposed and integrated
 - ◆ get personalised recommendation
 - ◆ discover the intuitive platform
 - ◆ streamline your research with customisable workflows
 - ◆ ... (figuring out which features are most useful to an audience)
 - providers
 - ◆ monitor your services with our advanced analytics and intuitive dashboard
 - ◆ easily manage orders from start to finish
 - ◆ use in-platform management tools or integrate your own
 - ◆ ad your services to existing workflows
 - ◆ increase visibility and findability of the services
- decision

This audience does not need that much more content, just a final push with a strong call to action

 - register for the EOSC platform
 - become a service/data provider

For **open calls**, the messaging is much more straightforward, since they are targeted at more specific user groups. Messaging would therefore need to include the following elements:

- What is the call offering?
- Who is it for?
- Why is it interesting to the audience?
- What is the deadline?

To define the messaging of their own outputs, consortium members can use an easy-to-use template (Appendix D).

4.4 Operationalisation

4.4.1 Content Collection

Every first week of the month, the whole consortium will receive an email reminding them to inform the communications team of upcoming:

- events
- outputs
- calls
- other actions that might require communications.

The consortium will be asked to complete a template, which partially follows the basic structure of the contents needed to create an overview of the communication and dissemination actions for interim reporting. The communication team will gather extra inputs as needed and will provide an overview of the materials received during the editorial meeting.

Consortium members and others in the EOSC Community can always send in content ad hoc at the EOSC Future news' email address once operational.

4.4.2 Planning of activities

An EOSC Future editorial board will meet on a bi-weekly basis starting from July 2021 until the end of the project to streamline communication. The editorial board will include the key members of the WP10, who together also have a good idea of the state of play from other work packages.

- | | |
|------------|------------------|
| • Arctik | • UGOE |
| • EUDAT | • EGI Foundation |
| • TRUST-IT | • OpenAIRE |
| • RDA | • GÉANT |

The editorial board will also extend an invitation to other EOSC projects, the Science Clusters and the EOSC Association. Other work packages will be asked to join when this is deemed necessary by other members on the editorial board.

Content will be structured using:

- a long-term plan of communication activities based on Appendix C.
- an overview of events and external hooks.
- an editorial calendar.
- a social media calendar.

Each meeting, the editorial board will:

- go through the list of events and external hooks:
 - adding any new events.
 - outlining who in EOSC Future or the broader network is attending or presenting. For larger events, it will proactively follow up to see if anyone within the consortium will be attending.
- go through the list of newly announced content.

- flag additional content.
- decide what content to prioritise, which communication actions are needed for that content and who is responsible for the follow-up.
- go through the editorial and social media calendar for the upcoming weeks.
- plan multiplier actions for the upcoming month(s).

4.4.3 Supporting Communication by other Consortium Partners

The communication team have provided branded templates for Office programmes, posters, and social media to ensure visual cohesion across project outputs. In addition, consortium partners will be given an easy-to-use template to help them craft audience-oriented messaging for their outputs.

The consortium will also be asked to reach out to people in their networks that can help multiply our messages at most once per month. The communication team will provide them with an email to send to their network as well as a toolkit that can include:

- social media posts.
- Visuals.
- website banners.
- a model news item.
- a newsletter item.
- etc.

Depending on the type of action to be communicated, consortium partners will be asked to reach out to specific people they added to the multiplier list or their network as a whole. The consortium might also be asked to reach out to their own organisation's communication teams, although the EOSC Future communications team will try to set up a more tailored approach for these organisations based on the inputs gathered during the mapping exercise.

5 Monitoring and Evaluation

5.1 User engagement milestones

Three milestones are associated with the user engagement activities. These will be monitored by WP10 to ensure their implementation and progress in the project.

Table 5-1 User engagement milestones

Milestone name	Month
Co-create EOSC programme launched and user base of co-designers and testers in place	M6
EOSC Symposium #1	M18
EOSC Symposium #2	M30

5.2 KPIs

In keeping with the proposal, the engagement and communications are aiming to meet the following KPIs by M30:

Table 5-2 Key performance indicators

Target	Value	Target Description
Number of <i>EOSC Future</i> stakeholder events (physical, virtual and / or hybrid)	>40	number of multiplier workshops and events (including national and thematic), EOSC readiness workshops, EU RDA Plenary Meetings and EOSC symposia
Number of participants attending <i>EOSC Future</i> events (physical, virtual and / or hybrid)	>2000	total number of participants in <i>EOSC Future</i> stakeholder events
Number of appearances at third party events	60	speaking slot participation at conference (stakeholder/ industry /science events)
Number of EOSC in Practice Stories published with multidisciplinary and cross-country content	>30	focus is on easy-to-read summaries where impact is key for different stakeholders to digest EOSC added value. Member states, Policy, Citizens and General Public. Used as key documents, during EOSC discussions
Number of Webinars	30 (with > 50 participants each)	short webinars to explain what Open Science means in reality, and demonstrate specific services' added value. Where possible webinars will be backed up by use cases. Including webinars that focus on expectations and criteria from the RDA Open Calls (Assess clickthrough from the recorded webinars or slide decks, etc.)
Number of articles, events and infographics published on the website	500	production of content for the website delivered around specific highlights on deliverables and milestones
Number of views via social media	1,000,000	Twitter/LinkedIn publications and campaigns. Numbers will increase during live events, workshops or webinars to promote specific results

Number of video views	20,000	minimum ten Videos produced, as well as motion design. Assess number of video downloads, viewed news pieces with likes and comments
Number of articles published by third parties	100	online publication on websites, newsletters and news outlets published by the general and specialist media. Expected to a) generate increased stakeholders, b) increase numbers on social media channels, c) look to find best practices exchanges //synergies with other related projects

5.3 Analytics

In addition to these high-level KPIs, the communication team will closely monitor analytics that can give key insights into which areas of the communication need to be reinforced. By M6, the communications team will set up an interactive dashboard to monitor key website and social metrics in real-time and across the different project websites. Campaign results will be integrated into the dashboard monthly.

5.3.1 EOSC Services Uptake Monitoring

One of the metrics is the provisioning and the use of the resources in EOSC.

1. Uptake of EOSC-Core:
 - a. The onboarding of resources is performed by the EOSC Future onboarding team in the EOSC. WP10 can obtain statistics about the onboarded resources from this team, such as number, type, location of onboarded resources, type of the providers.
 - b. Other services in the core have their own channels for engaging with users, e.g. a service wants to integrate with the EOSC AAI, EOSC Accounting. WP10 should engage directly with the providers of each service in the core to understand the scale/nature of its use.
2. Uptake of EOSC services:
 - a. The usage of resources that require *ordering* (requesting) by the users in the EOSC can be monitored by counting the orders that were received in the EOSC. The EOSC Order Management tool (SOMBO) already provides an overview of the orders per service on a dashboard. WP10 can export metrics from this dashboard and can request improvement to the dashboard within the project.
 - b. The update of resources that are fully open access (no login), or open access (login but no authorisation) can be monitored indirectly: by tallying how many users reach those resources. WP10 will check with the developers whether/how such statistics could be displayed on a dashboard.
3. Uptake through other EOSC initiatives: Other projects/initiatives (will) also operate EOSC-compliant catalogues. WP10 should understand this landscape. If it is feasible to monitor resource provisioning and uptake across these catalogues, then it should agree with them on the way to capture metrics about those external catalogues.

From these inputs, WP10 can generate various metrics/statistics about the uptake of EOSC resources. For example, statistics could be produced regarding the following:

- most popular resources in EOSC.
- most active countries in accessing EOSC resources.
- most active sectors or countries in service provisioning.
- under-represented sectors/countries in provisioning or use.

6 Conclusions

To become successful, it is imperative that EOSC Future understands the needs of researchers and reaches them through the right communication channels. The aim is to take the appropriate actions to engage researchers throughout the design and implementation phases. To achieve this goal, the EOSC Future Stakeholder Engagement and Communication Strategy and Plan provides a coherent framework and guidance to structure relevant activities and presents the planned engagement and communication activities.

This deliverable will be the backbone for all work packages' engagement and communication activities throughout the EOSC Future project's duration, with WP10 monitoring that alignment. WP10 has therefore assigned at least one of its members to attend the meetings of each work package. WP10 activities will also raise awareness of EOSC Future's plans and ambitions in the community by synchronising activities and agreeing on the engagement plans with the EOSC Future consortium partners as well as with external initiatives.

The strategy put forward in this deliverable ties in with existing EOSC initiatives. Liaising with EOSC Association is foreseen to ensure the results of the EOSC Future Working Groups are aligned with the overall mission of EOSC. Also, the aim is to align with the EOSC Association Advisory Groups. In addition, this deliverable and its initiatives are aligned with EOSC's Strategic Research and Innovation Agenda (SRIA) and the deliverable will support the approach to its aims. According to the EOSC SRIA, EOSC: *"starts by linking multiple stakeholders – people and organisations – throughout the data lifecycle and across the EOSC ecosystem."*

Consumers will be the primary focus of the project's stakeholder engagement and communication efforts. Effectively reaching them requires reaching out to various stakeholder groups, including individuals and organisations from different disciplines. Researchers are at the centre of EOSC. It is therefore fundamental that the EOSC development moves in the direction that brings the most value for these researchers, who are the platform's primary users.

In particular EOSC Future is going to implement an engagement programme to enhance creation, uptake and design. The strategy will be implemented based on three pillars:

- **Pillar 1** – laying the foundations for EOSC Future's co-design activities and creating awareness of EOSC Future's plans and ambitions (M1-M8)
- **Pillar 2** – engaging EOSC users in co-design activities (M8-M30)
- **Pillar 3** – broadening the EOSC user base (M8-M30)

Stakeholder engagement activities will include diverse outreach and collaboration solutions. Main engagement activities foreseen are:

- widening user base and increasing the uptake as well as feedback collection and consultations:
 - involving users to design and create key elements EOSC Future outputs.
 - engaging over 200 users into EOSC Future User Registry to test solutions who would also act as EOSC champions within their institutions.
 - consultation with experts on the EOSC architecture and interoperability framework.
- promotion and dissemination of outputs and solutions developed by EOSC Future
- setting up a framework for RDA and DIH calls and promotion these open calls.
- setting up for monitoring mechanisms to follow communities engaged in EOSC and identify gaps.
- creating awareness of the EOSC Future ambitions and plans during various events.
- creating dialogue with providers and broadening provider base.

The following objectives have been established for communication activities:

- Primary objective touches upon [dissemination and exploitation activities where the aim is to](#) encourage uptake of EOSC resources. In particular, the activity bases on broadening the user base and growing a pool of resource and service providers.
- Secondary objective sets the scene for [communication](#) about the project's actions and results.
- Tertiary objective is to raise [awareness and understanding](#) of the EOSC core.

EOSC Future will reach these objectives through a concerted approach to website, social media, newsletter, events, media, and multiplier activities.

Appendix A - Overview of RDA Open Calls

Call Focus	Open Call Topic	Funding categories	Support Criteria	Expected EU Impact	Timing
Call Management	external evaluators	individuals with domain, technical and RDA knowledge	knowledge of RDA, EOSC	ensures transparency, openness and fairness of open call. Ensure no conflict of interest in evaluation.	M3 (CONTINUOUS)
Calls focused on RDA and EOSC meeting support (For organisations)	meeting and conference support	European organisations committed to hosting RDA plenary meetings	MoU with RDA global to host events: virtual, physical or hybrid	identification of an EU member state / associated country to host the global event in Europe and demonstrate EU contribution to global open science.	M8-10 and M16-M18
Calls focused on RDA Working Groups for the development of EOSC solutions (For organisations and individuals)	technical, domain and editorial expertise	individuals and organisations with domain, technical and RDA knowledge	creation of an RDA Working Group dedicated to EOSC solutions	fast track, high-quality EOSC solutions with technical documentation and maintenance plans	M5-M7, M12-M14, M18-20

Calls focused on RDA interoperability solutions (For organisations and individuals)	standards and adoption	early-career researchers, data science experts, technical experts and standardisation experts	expertise, knowledge and experience in dedicated call topic focus, early career researcher with studies in pertinent call topic area, support for standardisation application and accompanying technical documentation	expert insights to EOSC developments and knowledge and expertise exchange with global data professionals to ensure EOSC interoperability.	M12-14, M18-M20
Calls focused on RDA recommendation maintenance and technical support	technical expertise for domain-specific uptake of EOSC and RDA solutions	technical experts, including infrastructure managers, repository managers	specific technical expertise in RDA outputs (involved in the definition and development of the solution) to ensure the availability of RDA solutions.	implementation and maintenance of open and community-based standards and solutions in EOSC. Support for EU and global interoperability.	M5-M7, M14-M16
Scientific discipline and domain-specific support (For individuals and organisations)	dedicated community of practice support	organisations and Individuals from scientific communities not represented in the project	meet criteria of RDA Community of Practice, available support infrastructure to manage CoP	supporting the engagement of new scientific communities in EOSC through dedicated experts to advise on EOSC.	M6-M9, M10-12, M17-M19

Scientific discipline and domain-specific support (for individuals and organisations)	domain ambassadors	scientific and domain representatives expert in data management and open science	proven experience in data management / open science for the specific domain or discipline	accessibility of EOSC explained and clarified to new scientific communities.	M6-M8, M11-M13, M20-M22
Calls focused on RDA recommendation maintenance and technical support	maintenance facilities	web development and web architects	understanding of technical standards, outputs and specifications maintenance facilities and requirements	maintenance of open community developed technical solutions for implementation in EOSC	M6-M9
Scientific discipline and domain-specific support (For individuals and organisations)	cross-disciplinary science adoption grants	domain- and discipline-specific organisations not represented in the project adopting RDA outputs in support of EOSC implementation	dedicated infrastructure, service, etc. for implementation of technical or domain-specific solutions	implementation and maintenance of open and community-based standards and solutions for EOSC by scientific communities in discipline specific repositories and infrastructures to support EOSC interoperability and, ultimately, uptake.	M7-M10, M14-M17

Appendix B - Planned collaborations with other projects

Project/Initiative	Type/Scope of the collaboration	Examples of activities in scope	Main contact points in the EOSC Future project
Projects/ initiatives targeting commercial companies, mainly SMEs	<ul style="list-style-type: none"> • technical activities • uptake/Engagement 	see the details in D8.1	WP8
Cluster Projects	<ul style="list-style-type: none"> • technical activities • uptake/Engagement • training 	<ul style="list-style-type: none"> • service provisioning • integration within EOSC-Core • user provision • ensuring EOSC design is centred on scientific use cases - requiring communication and engagement with communities via the clusters • packages of services from EOSC Core, e.g. validation of research products metadata from Cluster data sources, against community guidelines (WP6) 	WP6/WP10
Data Spaces	<ul style="list-style-type: none"> • strategic 	<ul style="list-style-type: none"> • to understand potential synergies 	WP2
EOSC Enhance	<ul style="list-style-type: none"> • technical activities • uptake/Engagement 	<ul style="list-style-type: none"> • service onboarding • portal requirements and feedback • a joint editorial plan 	WP2/WP10
EOSC Secretariat	<ul style="list-style-type: none"> • uptake/engagement 	<ul style="list-style-type: none"> • symposium • Liaison Platform 	WP10
GAIA-X	<ul style="list-style-type: none"> • strategic 	<ul style="list-style-type: none"> • federation model • federation governance • technical interoperability 	WP2

Global Open Science Initiatives	<ul style="list-style-type: none"> • technical activities • uptake and engagement 	<ul style="list-style-type: none"> • technical alignment • standards and best practices • global coordination and dissemination 	WP10
INFRAEOSCo7 (DICE, OpenAIRE Nexus, EGI Ace, RELIANCE, C-SCALE)	<ul style="list-style-type: none"> • technical activities • uptake an Engagement • training 	<ul style="list-style-type: none"> • service provisioning • user support and training • contribution to EOSC Architecture and Interoperability guidelines (feedback on EOSC Core) • technical support • joint communication and dissemination • extension of DIH offer and provisioning of services to SMEs 	WP2
Member States	<ul style="list-style-type: none"> • strategic • uptake 	<ul style="list-style-type: none"> • Belgian project FAIR-GNSS • FOSB Knowledge Hub • EOSC national competence centres • EOSC national bodies • Spanish e-science Network 	WP2
OCRE	<ul style="list-style-type: none"> • business models • technical activities • uptake and engagement 	<ul style="list-style-type: none"> • a catalogue of commercial services • EOSC portfolio of case studies 	WP8
Regional projects (Synergy, Expand, NI4OS, Nordic, Pillar)	<ul style="list-style-type: none"> • technical activities • uptake and engagement • training • outreach in the Western Balkans 	<ul style="list-style-type: none"> • common EOSC Resource description template • resource catalogues • interoperability • outreach to National providers and consumers • requirements and feedback gathering 	WP2 T2.2.1

		<ul style="list-style-type: none">• understand experience around training capabilities• engagement and outreach to Western Balkans• indicator dashboard	
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Appendix C - EOSC Future engagement and communication calendar

When (months)	Activity	WP	Detailed activities	Targeted stakeholders	Related outputs / deliverables
M2	EOSC Future launch at the EOSC symposium 2021	WP10	organisation of the EOSC Future/EOSC Secretariat joint session	all	EOSC Future launched
M2-M6	strategic engagement with INFRAEOSCo7 and identification of joint/complementary activities	WP2 WP4 WP9 WP10	coordinate agreement portal requirements supporting o7 training involve in editorial activities and events	INFRAEOSCo7 projects	M6: collaboration agreement collaboration channels set up
M2-M6	strategic engagement with EOSC Enhance – identification of joint activities and hand-over	WP2 WP4 WP8 WP9 WP10	coordinate agreement align portal activities and hand-over how to make commercial services consumable via EOSC sync training activities on Portal involve in editorial activities and events	EOSC Enhance	M6: collaboration agreement collaboration channels set up
M2-M6	survey to understand the usage of commercial cloud services among research communities	WP8 WP10 WP6 WP10	design survey on cloud services and process feedback run survey, support outreach to WP6 outreach to the research communities multiplier and social media activities	individual researchers research communities Research Infrastructures	M6: D8.2a - overview of the usage of commercial services
M3	RDA call for evaluators opens	WP1 WP10	manage the open call applications draft the open call	experts on standards, data, science	30 evaluators contracted

			promote via editorial, social media and multiplier activities		
M4	first DIH call opens	WP8 WP1 WP10	draft open call manage the open call applications promote the open call and its results via editorial, social media and multiplier activities	private sector (SMEs)	XX pilots selected
M4 onwards	launch call for Working Groups and recruit members runs on a 6-monthly cycle	WP3 WP10	identify competencies needed and help draft call / recruitment procedures promote via editorial, social media and multiplier activities	Research Infrastructures e-Infrastructures	established Working Groups with appropriate membership
M4-M6	run an engagement campaign to build the EOSC Future user registry	WP10	develop incentives and run promotional campaign to sign up a diverse range of researchers Promote via editorial, social media and multiplier activities	research communities Research Infrastructures institutions	M7: user registry
M6	launch of the EOSC Future website	WP10	set up of the EOSC Future website and promotional campaign	all	website online
M6	meeting with INFRAEOSC 5b projects	WP2	organisation of a meeting with the INFRAEOSC5b project to synchronise activities	regional projects EOSC Future	joint collaboration plan
M6-M11	requirements collection on new EOSC Core functionalities (e.g. composability, AI oriented discovery)	WP4 WP10	design survey or other form of requirements capture run survey and gather feedback promote the open call via editorial, social media and multiplier activities	research communities Research Infrastructures tool providers	M9: D4.2a/b - back-office requirement analysis

M7-30	documenting onboarding success stories	WP10	documenting onboarding success stories from the integration of the INFRAEOSC07 projects, the clusters and the WP8 commercial providers (interviews, testimonies) promote on social media	providers	providers success stories
M7-30	kick off of the bi-monthly "Ask me anything on EOSC Future services" sessions	WP10 and INFRAEOSC07	one-hour regular sessions presenting the EOSC services promote via social media and multiplier activities	research communities Research Infrastructures individual researchers	widening the user base
M8	2021 SEE User Event co-organized by GÉANT, NI4OS-Europe and EOSC Future.	WP10	event promote via editorial, social media and multiplier activities	users in the SEE region, customers of the regional NRENs, are coming together to become familiar with all the possibilities available in the area of the Open Science Cloud.	widening the user base and creating awareness in the Western Balkans
M8-M30	capacity building training for the service providers in the Western Balkans	WP10	capacity building training for the service providers in the Western Balkans organised in collaboration with NI4OS-Europe project.	providers	onboarding of new providers
M9	EOSC Future Open Day	WP10	public event to create awareness about EOSC Future promotion via editorial, social media and multiplier activities	all	community engagement
M10	development of an EOSC provider toolkit	WP10	development of an EOSC provider toolkit: why becoming an EOSC provider, how to become an EOSC provider	providers	toolkit available

M11	EOSC Future Consultation days	Wp10	public event to gather input from the community	experts research communities Research Infrastructures	feedback on the architecture/EOSC Future solutions
M11-M30	launch of procurement calls for commercial services	WP8 WP10	preparation of procurement materials promotion via editorial, social media and multiplier activities	private sector	M10: D8.3 - procurement plan for additional services not available through existing frameworks
M12	promotion of the first release of EOSC-Core and feedback collection	WP4 WP10	identify key advancements to promote. Process feedback received. run consultation and promotion	research communities Research Infrastructures tool providers data/research initiatives	M6: D4.3a/b/c - back-office software
M13	EOSC Future resource providers days / clinic	WP10	full day dedicated to EOSC Future providers promotion via editorial, social media and multiplier activities	providers	training, onboarding
M14	<i>refer-a-researcher</i> workshop	WP10	organisation of a four-hours event for 40/50 researchers not involved in EOSC where the EOSC mission will be explained and their expectations collected without entering into the details of the current developments (EURODOC, EUA, others networks will be used) promotion via editorial, social media and multiplier activities	individual researchers	widening the user base improving the EOSC communication
M14	promotion of the first open call pilots and Second DIH open call starts	WP8 WP1	draft the second open call manage the second open call	private sector	XX new pilots

		WP10	promote the second open call and the results of the first batch of pilots		
M15-M30	kick-off for specific info sharing sessions for Universities, Libraries and citizen scientists	WP10	kick-off for specific info sharing sessions for universities, libraries and citizen scientists (overall six sessions in the course of the project)	universities/Libraries/citizen scientists	widening the user base
M16	joint EOSC future INFRAEOSC07 Hackathon / Summer school	WP10	one week dedicated to co-design of EOSC architecture/Core and to uptake of INFRAOESC07 services promotion via editorial, social media and multiplier activities	research communities Research Infrastructures tool providers data/research initiatives	widening the user base
M18	launch Knowledge Hub	WP9 WP10	prepare materials targeted at different communities – researchers requiring training on EOSC and service providers wishing to onboard promotion via editorial, social media and multiplier activities	research communities Research Infrastructures institutions librarians tool providers private sector	M18: D9.2 - EOSC Knowledge Hub (training catalogue and platform)
M18	promotion of the second release of EOSC Core and feedback collection	WP4 WP10	identify key advancements to promote. process feedback received. run consultation promotion via editorial, social media and multiplier activities	research communities Research Infrastructures tool providers data/research initiatives	M18: D4.3a/b/c - back-office software
M18	promotion of the second release of EOSC portal front end and feedback collection	WP5 WP10	identify key advancements to promote. process feedback received. run consultation	research communities Research Infrastructures tool providers data/research initiatives	M18: D5.3a/b/c - front-office software

			promotion via editorial, social media and multiplier activities		
M18-M20	requirements collection for the new EOSC-Core functionalities (e.g. composability, AI oriented discovery)	WP4 WP10	design survey or other form of requirements capture run survey and gather feedback promotion social media and multiplier activities	research communities Research Infrastructures	M20: D4.2a/b - back-office requirement analysis
M18-M28	- Development of training courses and promotion to ensure uptake	WP9 WP10	identify training needs to help design / develop course content promotion via editorial, social media and multiplier activities	research communities individual researchers Research Infrastructures tool providers	training courses in platform
M19	EOSC Symposium 2022 (in conjunction with EOSC Future Consultation days)	Wp10	public event to gather input from the community promotion via editorial, social media and multiplier activities	research communities individual researchers Research Infrastructures experts EOSC governance	input and feedback from the community
M22	second event targeting the Western Balkans	WP10	event promotion via editorial, social media and multiplier activities	users in the SEE region, customers of the regional NRENs, are coming together to become familiar with all the possibilities available in the area of the Open Science Cloud.	widening the user base and creating awareness in the Western Balkans
M24	EOSC Future Consultation days	Wp10	public event to gather input from the community Promotion via editorial, social media and multiplier activities	experts research communities Research Infrastructures	feedback on the architecture/EOSC Future solutions

M26	promotion of the second DIH open call pilots	WP10	promotion via editorial, social media and multiplier activities	private sector	
M26	EOSC Future resource providers days / clinic	WP10	full day dedicated to EOSC Future providers Promotion via editorial, social media and multiplier activities	providers	training, onboarding
M27	<i>refer-a-researcher</i> workshop	WP10	organisation of a four hours event for 40/50 researchers not involved in EOSC where the EOSC mission will be explained and their expectations collected without entering into the details of the current developments (EURODOC, EUA, others networks will be used) promotion via editorial, social media and multiplier activities	individual researchers	widening the user base improving the EOSC communication
M28	promotion of training programme results	WP9 WP10	summarise key achievements in D9.3 run consultation promotion via editorial, social media and multiplier activities	research funders research communities Research Infrastructures institutions data/research initiatives	M28: D9.3 - EOSC training programme results
M29	promotion of Scientific Projects results	WP6 WP10	identify key results to promote. promotion via editorial, social media and multiplier activities	research funders research communities Research Infrastructures Institutions Data / research initiatives	M29: D6.3 – scientific documents on the results of the Scientific Projects
M29	promotion of final release of EOSC Core	WP4 WP10	identify key advancements to promote. promotion via editorial, social media and multiplier activities	research communities Research Infrastructures	M30: D4.3a/b/c - Back-Office Software

				tool providers data/research initiatives	
M29	promotion of final release of EOSC Portal front end	WP5 WP10	identify key advancements to promote. promotion via editorial, social media and multiplier activities	research communities Research Infrastructures tool providers data/research initiatives	M30: D5.3a/b/c - Front-Office Software
M29	promotion of Digital Innovation Hub results	WP8 WP10	identify key advancements to promote. promotion via editorial, social media and multiplier activities	research funders tool providers private sector	M29: D8.5 - Digital Innovation Hub Final Results and Sustainability Plan
M30	promotion of the final release of the Knowledge Hub	WP9 WP10	identify key advancements to promote. promotion via editorial, social media and multiplier activities	research communities Research Infrastructures institutions librarians tool providers private sector	
M30	EOSC Symposium 2023 (in conjunction with EOSC Future Consultation days)	Wp10	public event to gather input from the community promotion via editorial, social media and multiplier activities	research communities individual researchers Research Infrastructures experts EOSC governance	input and feedback from the community

Appendix D - Messaging Support

Goals: What are you communicating about? Which action do you want your audience to take?	<p>e.g.</p> <ul style="list-style-type: none"> • I want people to apply for funding via the website • new functionalities in the online environment • I want users to register • new requirements for onboarding data • I want providers to read an article about this
Which audience(s) are you targeting?	<p>Don't be too broad thinking that that will allow you to reach more people. Broad targeting tends to be less successful than a more tailored approach. e.g. "researchers" is not as effective as "engineering researchers who are already using data services" or "researchers in the Balkans who are ready to sign on as users".</p> <p>If you are targeting very different groups or identifiable people, consider splitting them up into different audiences that each requires their own messaging. e.g. "policymakers at the European level" and "policymakers at the local level."</p>
Is this audience already in the know?	<p>Does this audience already know about EOSC or EOSC Future? Are they even aware of why open research data is essential? That some of their research outputs can be considered a data set? ...</p> <p>This is important to know. Consider how much contextual information you would need to provide. This also helps you determine whether there is a good match between your audience and your goals.</p> <p>An audience rarely goes from 0 to 100: they are unlikely to start using the platform, for instance, on first reading about EOSC (for anything more than a quick look around).</p> <p>If you find there is not a good match between your audience and your goals, you can:</p> <ol style="list-style-type: none"> 1. limit your audience (e.g. to only include more informed audience members) 2. split up your audience (e.g. providing messages to low-information/engagement and high-information/engagement audiences)
What's in it for them? What is most convincing to your audience?	<p>Try not to focus on everything you could say but lead with the information that is most likely to convince your audience, such as</p> <ul style="list-style-type: none"> • for an event: rather than giving a broad description of what the event is about, think of a few key things your audience might learn there. • don't just say, "this research uses data from different sources," but focus on the impacts such access to different sources provided to the researcher/team. • link to issues that they might already be thinking about cybersecurity, current affairs, how EOSC can overcome the societal challenge they might be thinking about even if they are not working on them ...) <p>Try not to use your jargon, but your audience's. Especially keep in mind that when you are addressing users, they are likely not as savvy about the architecture, protocols and data-related jargon as you are. So, avoid acronyms such as <i>AAI</i>, <i>ML</i> ... and EOSC jargon such as <i>science clusters</i> or <i>EOSC-Core</i></p>
Find a concrete way of translating those messages	<p>For shorter communications (for instance on social media):</p> <ul style="list-style-type: none"> • Make a matrix of your different audiences and different information needs, e.g. <ul style="list-style-type: none"> • researchers in large European consortia, • researchers working mainly on national projects <p>OVER</p> <ul style="list-style-type: none"> • don't know about EOSC

	<ul style="list-style-type: none">• already know about EOSC• are already users• Make a message for each segment in that matrix.• Then, end all of them with a call to action, e.g. read more, register now, spread the word ... Spread the posts out over time. <p>For longer messages, e.g. news items, presentations, decide whether it is possible to provide contextual info in such a way that it does not bother high-information audiences with things they know and don't leave low-information audiences guessing. You could, for instance, provide box insets or links with context. If this is not possible, you will have to target chiefly one audience and consider the other one by-catch. Decide which audience will be most performant in reaching your goal. Always avoid writing for the in-crowd only.</p>
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