EGI-InSPIRE

COMMUNICATIONS AND MARKETING PLAN

EU DELIVERABLE: D2.15

Document identifier:	EGI-D2.15_Communications_Strategy_v3
Date:	**24/05/2012**
Activity:	**NA2**
Lead Partner:	**EGI.eu**
Document Status:	**FINAL**
Dissemination Level:	**PUBLIC**
Document Link:	https://documents.egi.eu/document/1070

Abstract

The communications and marketing plan provides an overview of the communication and outreach strategy for EGI-InSPIRE. The document covers the roles of the different teams with EGI.eu and the NGIs. The document also outlines how the communications and marketing strategy will be implemented and monitored through metrics and key performance indicators.

I. COPYRIGHT NOTICE

II. DELIVERY SLIP

	Name	Partner/Activity	Date
From	C Gater	EGI.eu	21/03/2012
Reviewed by	**Moderator:** Isabel Campos **Reviewers:** Gilian Sinclair, Pina Salente	CSIC NGS INFN	17/05/2012
Approved by	**AMB & PMB**		24/5/2012

III. DOCUMENT LOG

Issue	Date	Comment	Author/Partner
1	21/03/2012	ToC	C Gater/EGI.eu
2	23/04/2012	First draft	C Gater/EGI.eu
3	30/04/2012	Second draft	C Gater/EGI.eu

IV. APPLICATION AREA

This document is a formal deliverable for the European Commission, applicable to all members of the EGI-InSPIRE project, beneficiaries and Joint Research Unit members, as well as its collaborating projects.

V. DOCUMENT AMENDMENT PROCEDURE

Amendments, comments and suggestions should be sent to the authors. The procedures documented in the EGI-InSPIRE "Document Management Procedure" will be followed:
https://wiki.egi.eu/wiki/Procedures

VI. TERMINOLOGY

A complete project glossary is provided at the following page: http://www.egi.eu/results/glossary/.

VII. PROJECT SUMMARY

To support science and innovation, a lasting operational model for e-Science is needed − both for coordinating the infrastructure and for delivering integrated services that cross national borders.

The EGI-InSPIRE project will support the transition from a project-based system to a sustainable pan-European e-Infrastructure, by supporting 'grids' of high-performance computing (HPC) and high-throughput computing (HTC) resources. EGI-InSPIRE will also be ideally placed to integrate new Distributed Computing Infrastructures (DCIs) such as clouds, supercomputing networks and desktop grids, to benefit user communities within the European Research Area.

EGI-InSPIRE will collect user requirements and provide support for the current and potential new user communities, for example within the ESFRI projects. Additional support will also be given to the current heavy users of the infrastructure, such as high energy physics, computational chemistry and life sciences, as they move their critical services and tools from a centralised support model to one driven by their own individual communities.

The objectives of the project are:

1. The continued operation and expansion of today's production infrastructure by transitioning to a governance model and operational infrastructure that can be increasingly sustained outside of specific project funding.
2. The continued support of researchers within Europe and their international collaborators that are using the current production infrastructure.
3. The support for current heavy users of the infrastructure in earth science, astronomy and astrophysics, fusion, computational chemistry and materials science technology, life sciences and high energy physics as they move to sustainable support models for their own communities.
4. Interfaces that expand access to new user communities including new potential heavy users of the infrastructure from the ESFRI projects.
5. Mechanisms to integrate existing infrastructure providers in Europe and around the world into the production infrastructure, so as to provide transparent access to all authorised users.
6. Establish processes and procedures to allow the integration of new DCI technologies (e.g. clouds, volunteer desktop grids) and heterogeneous resources (e.g. HTC and HPC) into a seamless production infrastructure as they mature and demonstrate value to the EGI community.

The EGI community is a federation of independent national and community resource providers, whose resources support specific research communities and international collaborators both within Europe and worldwide. EGI.eu, coordinator of EGI-InSPIRE, brings together partner institutions established within the community to provide a set of essential human and technical services that enable secure integrated access to distributed resources on behalf of the community.

The production infrastructure supports Virtual Research Communities (VRCs) − structured international user communities − that are grouped into specific research domains. VRCs are formally represented within EGI at both a technical and strategic level.

VIII. EXECUTIVE SUMMARY

The communications and marketing plan provides an overview of the communications activities for EGI-InSPIRE. The communications and marketing task within EGI-InSPIRE falls into WP2 (NA2-Community Outreach). This work package supports the development of policy, the coordination of standards and the dissemination and community building activities supporting the coordination of the European e-Infrastructure. For task NA2.2, the aim is to communicate the work of the EGI and its user communities both within the project and worldwide. The communications and marketing plan is targeted at EGI-InSPIRE partners contributing to EGI Global tasks and the NGI International Liaisons, but also to other EC-funded projects involved in dissemination.

EGI-InSPIRE is working to establish collaborations with external partners in the EGI ecosystem such as technology providers, European and International e-Infrastructure providers, dissemination and coordination projects, international policy bodies and virtual research communities. The communications team works with a range of projects through these collaborations.

The document sets out a number of success criteria for the communications task, including effective internal communication, building on other work package networks, clear communication of requirements, managing expectations, making optimum use of resources, building a sense of community and reinforcing realistic expectations of grid technology. The document also outlines suggested ways to measure the achievement of these success criteria, and lists a number of quality metrics.

The Communications and Marketing Plan identifies the primary target audiences for the communications outputs, including new and existing user communities, journalists, general public, grid research and standards communities, resource providers, collaborating projects, decision makers and governmental representatives. Also included are a suggested set of messages that can be used to target these audiences and a discussion of the characteristics of each audience, together with ideas for reaching out to them effectively.

Finally, the means for communication are discussed including an overview of plans for the project website and web design, the materials and publications, media and public relations, social media and events and marketing to new users. Some specific examples of the materials that will be produced in each of these categories are also included in the implementation section.

The Communications and Marketing Plan is a work in progress, and will be updated annually in Deliverable D2.22, in synchronisation with the annual reviews of the project website (MS231, MS242) and the updates to the Dissemination Handbook (MS228, MS238).

TABLE OF CONTENTS

1 INTRODUCTION

The communications and marketing plan provides an overview guide to the outreach activities for EGI-InSPIRE and EGI. The communications and marketing task within EGI-InSPIRE falls into WP2 (NA2-Community Engagement). Managing an integrated approach to new communities, at both a national and European level, relies on close coordination of the different non-operations teams within EGI.eu, who provide services to the NGIs and to each other. For task NA2.2, the aim is to communicate the work of the EGI and its user communities both within the project and worldwide, with a main focus on bringing new user communities on board and communicating EGI's added European value. The communications and marketing plan itself is targeted at EGI-InSPIRE partners contributing to Global communication tasks and Virtual Teams, but also to other EC-funded projects involved in dissemination.

At the end of the first year of the project, the non-operational teams i.e. policy, dissemination and community outreach, were all managing large, distributed networks of contacts at the NGIs. As a result of issues raised by task leaders, and recommendations by the EC reviewers after the first review, the NA2 and NA3 work packages were merged in PQ7.

As part of the merger of NA2 and NA3, a new role was created within the project. The NGI International Liaison is responsible for ensuring that the appropriate individuals or teams within the NGI respond to any particular non-operations issue or activity needed. These may include areas such as policy, strategy, communication, training, outreach or events, but with a particular focus on new communities and sustainability. The merger of NA2/NA3 and the role of the NGI International Liaisons are described in more detail in D2.14 Annual Report on EGI and its External Relations Activity. [R1]

The communications plan is supplemented by MS228 Marketing and Communication Handbook, released in PQ9. This gives an overview of the practical elements relating to marketing, design and branding for EGI including the accepted use of branding elements, such as logos, colour palettes and EC logo use. The Communications Handbook also covers the services provided by the central communications team that are available to NGIs and collaborating projects and the mechanism for proposing virtual teams around communications activities.

1.1 Aims of the Communications and Marketing Plan

The main aim of the Communications and Marketing Plan is to outline strategies and means for successfully communicating EGI's outcomes across Europe and internationally. Specifically D2.15 will:

- Outline the stakeholders and participants in EGI communications
- Define the target audiences for the project and the project's results
- Summarise the message and means for reaching out to EGI's target audiences
- Describe techniques for monitoring and evaluating the progress in reaching out to these audiences

1.2 EGI-InSPIRE partners and responsibilities

1.2.1 EGI Global Task

The EGI Global task is coordinate and carried out by EGI.eu in Amsterdam, and contributes 96PM to task TNA2.2. The Deputy Director manages the task through the coordination of the staff within EGI.eu and liaison with the NILs. The EGI.eu team consists of professional science writers and designers, and an NGI Dissemination Coordinator. The EGI Global Task also administers a dissemination budget for stands at major exhibitions, central printing of posters, leaflets, booklets and other promotional materials, for example for EGI events, and also website CSS design.

1.2.2 NGI International Liaisons and Virtual Teams

The communications and marketing activities of EGI are supported by the distributed competency centre that has been established across the NGIs, as described in D2.14 [1]. The network of contacts at NGIs that are responsible for non-operations tasks draw on expertise within the NGIs in the areas of communications and marketing, strategic planning and policy support, community outreach and technical outreach to new communities. This expertise will be brought to bear on solving issues blocking access to EGI resources for new users, through the mechanism of setting up *ad hoc* Virtual Teams established over a short period of a few months to solve individual problems.

For communications, these activities will include using the Virtual Team mechanism to develop the EGI main website further with additional community-generated content such as news items, case studies, social media, images and information about the NGIs. The marketing team will also contribute to a Virtual Team set up by the policy team to establish an online compendium of information about the NGI, which will include capturing the scientific papers published by researchers using the infrastructure. Publications are already gathered through the project quarterly reports, and the Virtual Team will investigate methods to gather these from NGIs more frequently and systematically, and provide a consistent way to store and reference them online. These papers will form the basis of further case studies that can be used by all partners in the project, for example to produce materials such as leaflets and posters targeted at individual research communities in a variety of languages.

Virtual Teams will also be used to organise workshops to coordinate communications activities targeted at particular communities. One example team will be set up in collaboration with the ENVRI (Common Operations of Environmental Research Infrastructures) project, the environmental sciences ESFRI cluster project[1]. The Virtual Team will create a network of dissemination officers at the environmental Research Infrastructures, such as EISCAT_3D, EMSO, EPOS and LifeWatch and bring them together at the workshop to establish community priorities and publicise new applications and tools available in EGI for the community. This workshop will then form the basis of ongoing collaborations between EGI and the environmental sciences community. This workshop model can also be explored for the other ESFRI cluster projects in the areas of physical sciences, humanities and biological sciences ie CRISP[2], DASISH[3] and BioMedBridges.

---

[1] www.envri.eu

[2] www.crisp-fp7.eu/

[3] http://dasish.eu/

1.3 Working with collaborating projects

During the first two years of EGI-InSPIRE, EGI.eu signed a number of MoUs with technology providers, resource infrastructure providers, virtual research communities, policy standards bodies and other projects, such as regional projects, policy projects and other infrastructures. The majority of these MoUs include milestones for collaboration in the area of communications, such as announcing the collaboration through mutual channels, hosting mutual links on websites, organising joint events and publishing materials in project newsletters. These activities are reported annually through milestone reports for each project[4].[5] These activities will continue for the existing projects, and further communications agreements with newly funded projects that are strategic for bringing new user communities on board will be negotiated in collaboration with the policy team.

EGI.eu is now a funded partner in the BioVEL[6], eFISCAL[7], ENVRI[8], FedSM, HelixNebula, ERFlow and Digital Cultural Heritage (DCH-RP) projects. BioVEL connects the IT and biodiversity research fields, exploring areas such as developing workflow technology and data processing for the research laboratory. eFISCAL aims to analyse the costs and cost structures of HTC and HPC e-Infrastructures. ENVRI aims to develop common e-science components and services for the environmental sciences Research Infrastructures. FedSM follows on from the gSLM project [9] which aims to improve Service Level Management in the grid domain. HelixNebula is bringing together CERN, ESA and EMBL and commercial cloud providers to provide a science cloud in the areas of physics, space science and health sciences. ERFlow provides support to the SHIWA[10] workflow project. DCH-RP is working to gather e-Infrastructure requirements for the cultural and humanities area. The EGI.eu involvement includes small amounts of funded marketing and communication effort in eFISCAL, ENVRI and HelixNebula. Through its involvement in these projects, EGI will be able to open up communications channels to a wide range of potential new users of the infrastructure, for example in the areas of environmental sciences, humanities and cloud computing. The collaborating partners in ENVRI for example have 10,000 users across various environmental disciplines. Potential collaborations with these partners include materials featuring case studies in particular areas, such as the earth sciences brochure produced for the EGU General Assembly in Vienna in April 2012, and the health science brochure planned for the HealthGrid conference in May 2012. Additional videos in the 'Stories from the Grid' series can also be targeted to participants in these projects, for example.

EGI.eu also coordinates the e-ScienceTalk project, which aims to communicate the results of e-Infrastructures, such as EGI, to the general public, policy makers, scientists and students through blogs, weekly publications, briefings, social media, websites and a 3D virtual world. Subscribers to e-ScienceTalk's weekly publication, International Science Grid This Week[11] have grown to 8000 worldwide, with 3000 followers on social media. Videos filmed at events such as the EGI Community and Technical Forums for the GridCast[12] blog have been viewed nearly 100,000 times in YouTube in

---

[4] https://documents.egi.eu/document/894

[5] https://documents.egi.eu/document/931

[6] www.biovel.eu

[7] http://efiscal.eu

[8] www.envri.eu

[9] http://gslm.eu/

[10] http://www.shiwa-workflow.eu/

[11] www.isgtw.org

[12] www.gridcast.org

---

total. During the first two years of EGI-InSPIRE, the collaboration with e-ScienceTalk has been particularly productive, including 321 mentions in iSGTW and 52 feature articles on work related to EGI. Some of these items published in iSGTW have been picked up by the general media, such as *Symmetry*[13], *Discover News*[14] and *Wired*[15] and communicated to their readership through articles or Twitter. (The Twitter accounts which follow iSGTW have a combined following themselves of 1.6 million people). EGI.eu is included in the worldwide map of important grid sites, GridGuide[16] and e-ScienceTalk have been media partners for all four EGI events, coordinating GridCast blogs featuring up to 10 bloggers reporting from each event, together with active social media channels. EGI's collaboration with e-ScienceTalk will continue during the third year of the project, focusing around the EGI Technical Forum in Prague in September 2012, and the EGI Community Forum in Manchester in April 2013. E-ScienceTalk will continue to act as media sponsors and coordinate social media activity and blogging activities reaching out to the wider science community and general public.

EGI also holds regular meetings with its communications 'industry' peers in the e-Infrastructure arena ie e-Infrastructures Reflection Group, TERENA, OGF and DANTE to collaborate on materials for websites and newsletters, events announcements and to benchmark our social media activities.

1.4   Success factors

To achieve success in disseminating the project's core messages to its wide range of audiences and in functioning effectively as a task within EGI-InSPIRE, the following critical success factors should be met during the lifetime of the project:

- **Effective communication within NA2.** For a project of this size it is vital that NA2 partners maintain good communication channels.

- **Close collaboration with NA1 and the Policy team.** A close working relationship is essential to ensure messages are accurate and consistent across the whole project.

- **Build on the user community networks**. Use networks established through the user support activities to disseminate the project's messages as widely as possible and to foster new user communities. The communications and user community support teams and the NILs must also coordinate their attendance at events in order to reinforce the impact of EGI's presence.

- **Clear internal communication of what NA2 requires from the other activities to achieve its aims.** Communicate what NA2 needs from the other activities to achieve success e.g. timely input of information, regular updates of project websites, leads to potential new users or scientific fields, suggestions for events to attend, early notification of press opportunities, details of key achievements such as scientific papers.

---

[13] http://www.symmetrymagazine.org/breaking/2012/04/18/listening-for-the-sound-of-science

[14] http://news.discovery.com/space/making-music-with-the-sounds-of-symmetry-120419.html

[15] http://www.wired.co.uk/news/archive/2012-04-19/particle-physics-music

[16] http://www.gridguide.org/gridguide-profiles.php?id_ge=76&display_element=1&PHPSESSID=312c0a9fc5eccb09dd911dadde94033a

- **Manage expectations through clear communication of the task's implementation plan**. The activity will concentrate its resources where it can achieve the biggest wins for the project.

- **Make optimum use of budgetary resources.** The aim is to achieve high production values at a reasonable cost, with re-use of content across a wide range of media e.g. press releases, web, blogs, videos, publicity materials.

- **Build a sense of community.** The communications activities should foster a sense of community among new and existing users and also between the activity partners.

- **Reinforce realistic expectations of grid technology.** NA2 should communicate both the benefits of grid and DCI technology and also its current limitations.

In addition to these qualitative success factors, quantitative progress towards achieving the communications team's aims to reach out to its audiences will be measured through the quality metrics, outlined in Section 6.

2 TARGET AUDIENCES

As an internationally funded project, it is important that any communications and marketing undertaken by EGI-InSPIRE reaches as wide a range of audiences as possible and also that messages are targeted effectively at these audiences.

The following potential audiences have been identified:

Primary audiences:
- New user communities (social sciences, environmental sciences, humanities etc.)
- Existing user communities (life sciences, physics, computational chemistry etc.)
- Journalists and media
- General public
- National Grid Infrastructures (NGIs) and European International Research Organisations (EIROs)
- Resource providers
- Collaborating projects
- Decision makers
- Governmental representatives

Secondary audiences
- Secondary schools, educational institutions
- Local communities in the partner countries

When considering these target audiences, this document should both describe and define their characteristics and give an overview of how EGI will reach out to them. For example:

1. What is special about this community, what makes it unique?
2. Why is this audience important to EGI?
3. What will success in communicating to this audience look like? i.e. more users, more user communities, better brand recognition?
4. How will EGI achieve success in reaching out to this audience?
5. What are techniques that have been shown to be effective (or not) in the past?

2.1 Research communities

What is special about this community, what makes it unique?

The researcher is the grid's raison d'etre and its sustainability relies on an engaged and broadly satisfied user community. While supporting research communities already established within EGI remains a major role for the VRCs, EGI.eu has many years' experience and contacts both in the technical and communications field to support/assist the VRCs to achieve this.

Why is this audience important to EGI?

Research communities that have achieved successes on the grid have been driven by a combination of a need to make use of the infrastructure and by meeting the users' requirements. This is why for example the high energy physics community remains a major user of the infrastructure. This approach also underpins the many individual success stories such as the Lost Sounds Orchestra[17], led by DANTE, the Computational Chemistry super users and the WeNMR[18] structural biology project. Once the research community understands and gains real tangible benefits from the infrastructure, usage grows within that community. However this is a new 'battle' with every new research community and while EGI must draw from the lessons learned by an individual community, there are different barriers for each new community, particularly with regards to the level of technical knowledge endemic within that discipline. EGI should work closely with the VRCs to translate initial interest from a particular individual researcher or research community into confirmed and then consolidated use of the infrastructure.

What will success in communicating to this audience look like?

One main indicator of success for the EGI communications team will not necessarily be the total number of users from a particular research community, but how many people investigate using grid as a tool in their research. The grid is not a panacea and it will not solve every problem, but it could give them a start in the right direction. EGI can also engage researchers with e-Infrastructures as a whole and explain how they can benefit the European Research Area. EGI is uniquely placed to help them to find the solution that works for them. In cases where the grid may not be the most appropriate research tool for them at the time, it may be the right solution to another research problem later on (or to another colleague's research work). Continual communication of successful use cases helps to raise awareness and understanding of the grid, demonstrates how users in one field have solved a problem, which might also work in another field and keeps it in the minds of researchers as part of their research toolkit, either now or in the future.

Indirect indicators of success can include a wider range of user communities participating in Community Forums to exchange common use cases, opinions and practices, or promoting EGI at their local events. Similarly, an indirect indicator of the success of communication to the research communities is when EGI is perceived as being important, respected, authoritative and adding value. This type of engagement is demonstrated for example by participation in the demo and poster competitions at the EGI Forums and the prestige attached to winning the competitions.

How will EGI achieve success in reaching out to this audience?

- EGI will "go to the user", engaging with them at their events by working with the VRCs to select important community events where EGI can promote itself and help users to engage with the VRC.
- Organise an Essay or Science Blog Competition for PhD students and early-career scientists who use the grid for their everyday work. This will allow EGI to engage with young scientists, and establish them as ambassadors for EGI within their communities, who may not yet be

---

[17] http://www.lostsoundsorchestra.org/

[18] http://wenmr.eu/

using the grid widely in their own work. EGI will seek to partner with a media sponsor to run the competition, both to publicise the competition, source high profile judges and to give a wide circulation platform for publishing the winning entries.

- Continue to build a case study collection, covering as many fields as possible, available as brochures, downloads, articles, blog posts and videos.
- Continue to promote and communicate the benefits, new features and improvements that are being made to the grid for existing users.
- Work with the Technical Outreach the New Communities team to promote easy-to-use tools, portals and services suitable for non expert users.
- Collaborate with VRC projects such as ENVRI, WeNMR, CLARIN, DARIAH through MoUs[19] to publicise grid tools and services to their user communities.

What are techniques that have been shown to be effective (or not) in the past?

EGI should engage the researcher on their terms. Outside computational chemistry and some physics areas, the use of esoteric interfaces, command lines and so on is very rare. EGI needs to work with the VRCs and projects supporting these research communities to help them to understand that drastically changing a researcher's workflow will probably not be effective in encouraging them to use the grid. A good target for the central communications team is to attend 4 to 6 scientific meetings a year at which EGI has current users and case studies, but more penetration is needed to widen usage to the 'long tail' of Europe's 1.8 million publicly funded researchers. This is where the engagement of EGI ambassadors in the various academic fields is needed to widen EGI's influence at events. A discussion on setting out a template for a step-by-step guide for researcher's new to EGI or a new VO would be an effective topic for a Virtual Team to consider.

2.2 Media and general public

What is special about this community, what makes it unique?

This community cannot directly benefit from or use the grid. This makes it unlikely that EGI can "sell" them the grid as a concept in itself beyond an initial introductory explanation of its benefits; but the work EGI supports is highly engaging when it can be related to people's day-to-day lives. The work of EGI.eu itself as a coordinating body i.e. signing MoUs and providing support to various technology providers is of interest to trade publications such as policy journals and trade magazines. However, it is the work that is done by the infrastructure EGI.eu coordinates that is of much more general interest.

The area of general public and media falls into three broad sub-categories: general press (for the not-interested/semi science interested public), popular scientific press (e.g. New Scientist-type publications for the interested public who already have an affinity to science-related topics); computing technology press (high level technical interest in e-science and computing).

Why is this audience important to EGI?

---

[19] http://www.egi.eu/community/collaborations/

Everyone is part of the "public" and so mentions of the grid in the mainstream media also improve EGI's visibility within the scientific community and with policy makers. This audience is therefore important because the general public are a silent stakeholder in EGI, unlike for other projects such as volunteer computing, or citizen science where they are able to actively participate. This audience derives their information via mainstream and non-mainstream news channels, which in turn gives the general media importance for EGI. Areas of research that are picked up in the mainstream press have often been high profile in their own specialist fields first for some time e.g. the LHC, neuroscience, nanotechnology. Reputation has to be built upon, and that does not happen instantly, but through a steady drip of stories about relevant, quirky or cutting edge science.

What will success in communicating to this audience look like?

Success for EGI lies in seeing more discussions and mentions of the research done on the grid outside our own channels. It is not possible to buy full page articles in The Times every week, but getting our message to places outside our sphere of influence is a sign that other people have taken note of the work being done, such as being mentioned in a positive or neutral tone in the technology press, popular science press and the mainstream press, as well as through social media channels such as blog post comments.

How will EGI achieve success in reaching out to this audience?

A main route to reaching out to the press is still through the judicious release of press releases, when this is relevant and interesting to the particular publication's audience, or the journalist involved. The key could be in building up relationships with individual journalists, for example through exclusive coverage or press tours. In this respect, the central EGI team is reliant on support from the NILs in reaching out to their local journalists and making good use of the resources and facilities that they have available. For example, much press has been attracted to the grid in the past through press tours of the LHC at CERN.

Initiatives such as an essay competition could also be advertised to journalists through bodies such as the Association of British Science Writers, and the European journalism networks. Ideally, EGI would be looking to attract the interest of other freelancers with access to high circulation publications.

EGI is also able to commission relevant work (e.g. infographics) by people and social influencers who are watched by the media. Joint press releases or social media postings together with institutions such as CERN, who have been highly successful in attracting media attention in the past, would also be effective. This could include for example tweeting a link to an EGI video about high energy physics.

What are techniques that have been shown to be effective (or not) in the past?

Frequent, low impact press releases are generally not effective in targeting journalists, particularly if the subjects lie outside their areas of expertise – future releases from EGI will be ignored. Publishing releases on a subscription basis to press services such as AlphaGalileo can be effective as the journalists will only receive releases that are important for their area of expertise. This is important for an organisation such as EGI which is promoting work that covers a wide variety of fields and levels of complexity.

EGI's biggest successes to date have been in marketing quirky stories directly to the general press when other news is quiet, or in targeting trade journals through media partnerships at EGI events, which means that a journalist is then onsite at the meeting and able to follow leads themselves. Journalists generally want to go straight to the source of story, and will usually only consider a story if they can reach the people involved straight away, and if the work is very visual. Supporting trade journals of this type can be effective in reaching the general press, as stories may be picked up through the news wire e.g. from Fermilab's Symmetry publication to Discovery News and Wired US.

2.3 Collaborating projects and policy makers

What is special about this community, what makes it unique?

Collaborating projects can be effective multipliers for EGI news and events announcements but are also subject to streams of information from many sources – EGI news has to stand out to be noticed. Similarly, policy makers are notoriously difficult to target as they are also bombarded with information, and need EGI's messages to be distilled right down to what they mean for them and their stakeholders.

Why is this audience important to us?

Policy makers hold the key to future funding and they also decide on strategic priorities. In this context, communicating the achievements, benefits and added value of what EGI does is essential - to keep our work on their agenda and keep them engaged beyond the hype that might be attached to new technologies as they come along, and to motivate them to support future efforts in more mature fields. As such, this audience has a direct influence on the existence of EGI.

What will success in communicating to this audience look like?

Success will mean open communications channels, ensuring that policy makers and collaborating projects listen to EGI, take what we do into account and broadly support us. In the process, EGI will incorporate their high-level vision and missions into its strategies.

How will EGI achieve success in reaching out to this audience?

- Develop high-level, high production value brochures and materials featuring EGI strategy and goals, such as the Annual Report.
- Publish opinion papers by the Director and policy teams in appropriate high circulation publications such as the Digital Agenda blog, Public Service Review and PanEuropean Networks, the e-IRG newsletter.
- Maintain a high profile attendance at policy-related events, such as eChallenges, SciTech Europe, European Parliament events, EC consultation events.

What are techniques that have been shown to be effective (or not) in the past?

Publications in high circulation policy related journals such as Public Service Review and PanEuropeanNetworks have generated considerable internal interest within the European Commission and led to invitations to participate in consultation and high level strategy meetings, such as ICRI, where EGI has also been mentioned in speeches by Neelie Kroes, the Digital Agenda Commissioner.

2.4 NGIs and EIROs

What is special about this community, what makes it unique?

This community has a very broad remit due to its multiple roles, from communications, to policy analysts to operations.

Why is this audience important to us?

The NGIs and EIROS are EGI's key stakeholders and a key source of both funding and resources. As participants in the EGI Council, this audience works together with others to direct the future strategy of EGI.

What will success in communicating to this audience look like?

EGI aims to achieve an engaged community that is motivated to do its best for the benefit of the users. Participation in EGI events should remain steady or increase, and NGIs will continue to volunteer to provide ideas for case studies, news items, newsletter features and to participate actively in Virtual Teams. NGIs should continue to be keen to be promoted by EGI through its central channels. If communication to this audience is successful, EGI should be perceived as important, respected, authoritative and adding value, for example NGIs will continue to request EGI materials for distribution at their events and to policy makers, and for EGI to distribute their materials.

How will EGI achieve success in reaching out to this audience?

- Provide international visibility for national bodies e.g. website, blogs, social media, press
- Ask for and listen to suggestions for materials, resources e.g. the EGI compendium
- Report successes e.g. through the newsletter, website and newsfeed
- Build a community forum for sharing successes e.g. the Inspired newsletter, social media sites
- Support local dissemination efforts e.g. provide materials, produce brochures in local languages (if translation is supplied)

What are techniques that have been shown to be effective (or not) in the past?

Strategies that are effective in communicating to NGIs and EIROs include building personal relationships with NGI staff, in particular the NILs, for example by hosting community meetings about communications at the EGI Forums to provide opportunities to share successes, and failures, and to feed ideas into the central strategies. Listening and most importantly responding to ideas and

suggestions from the NGIs and EIROs helps to create trust, and supports the central team in sourcing community content in the future.

2.5   Audiences, messages and the strategic plan

EGI is result of pioneering work that over the last decade has built a pan-European production infrastructure through the federation of national resource providers, to support multi-disciplinary science across Europe and around the world. However, EGI is not a static resource and the community is looking to the future to identify opportunities, expand its service offering and anticipate challenges.

EGI's strategy for the future is to develop its activities in order to be a key enabling foundation of the digital European Research Area, supported by continued investment from national and European funding bodies. This is outlined in EGI's Strategic Plan [R12].

In practice, EGI's strengths will be developed in three areas:

- **Community building and coordination** – community building and coordination experience, which will integrate and deliver uniform and open access to computing resources.
- **Operational infrastructure** – developing the tools and services to support existing communities and offer virtualised resources through a federated cloud.
- **Virtual research environments** – customising and deploying VREs to support world class science.

EGI's Communications and Marketing Plan will be integral to supporting EGI's strategy in the coming years. In particular, communication to the audiences defined in the previous sections and the messages outlined in the next section will contribute in the following areas:

Community building and coordination

- *NGIs*: Developing technical expertise with the newer and smaller NGIs by promoting EGI events and training events.
- *Policy makers and collaborating projects*: building and promoting an open EGI ecosystem by promoting EGI policies and processes.
- *NILs:* strengthening the NIL network to build a grass roots infrastructure for community engagement, technical outreach and communication.

Operational infrastructure

- *Researchers*: allow individual researchers and research communities to access and analyse remote data by promoting use cases and community events where requirements can be gathered.

Virtual Research Environments

- *General public and media*: promote the advantages of using e-infrastructures through VREs by publicising EGI and raising its profile more widely.
- *Researchers*: collect requirements and feedback from researchers through case studies, events and social media.

3 MESSAGES

The key to successful communication is strong and clear messages, which remain consistent across all dissemination channels and partners.

Current key messages are:
- What the project is about;
- What resources, infrastructure and services the project can provide;
- What applications/scientific fields are already using the EGI;
- Benefits to a range of potential users;
- Comparison of grids, cloud computing and other distributed computing infrastructures;
- The project's potential to revolutionise the way scientists work;
- How to get involved;
- Major developments such as:
  - New applications;
  - Key milestones;
  - Key events;
- Who is involved in the project;
- The future beyond EGI-InSPIRE for a sustainable infrastructure.

Not all key messages will be relevant to all identified audiences. It is the responsibility of the NILs and EGI.eu to ensure that appropriate messages are conveyed to their identified audiences. Some example specific messages include:

For the general public:
- EGI gives scientists the computing power they need to analyse the vast amounts of data pouring from large-scale experiments, such as the Large Hadron Collider and the ESFRI projects.

- Modelling the natural world requires international collaboration. EGI gives scientists the computing power and collaboration platforms they need to understand phenomena such as climate change, ocean currents or how drugs work in the body.

For scientists:
- EGI provides 350,000 processor cores and more than 250 petabytes of tape and disk storage to 21,000 users across Europe and beyond.

- You don't have to be a computer expert to benefit from expert computing. EGI is the gateway to hundreds of cutting-edge software packages ready to use across many fields.

- One computer is a powerful research tool. EGI pools the resources of many computers to create the e-Infrastructure researchers need to bring European science and innovation to a new level.

- EGI nurtures virtual research communities across all fields of science and works closely with users to provide an integrated e-Infrastructure.

For funders and stakeholders:
- EGI delivers sustainable, integrated computing services to European scientists and their international partners.

- EGI integrates new technologies to support the Digital Agenda's vision for a Europe with no boundaries or obstacles to the free circulation of knowledge.

- EGI provides a pan-European e-Infrastructure that is more efficient and better value than the sum of each country's individual efforts.

4   MEANS FOR COMMUNICATION & MARKETING

4.1   Events and marketing to new users

In Year 3 EGI will focus on "going to the user". This means researching and selecting events focusing on individual scientific disciplines and promoting the benefits of grid to that community through targeted case studies and following this up with local support actions through the NILs. It also means working with the VRCs to select events and generate the materials. The work here will build on the continuing catalogue of materials known as "Stories from the grid" which includes posters, brochures and videos specifically aimed at the non-technical user. These follow a simple template of discussing what the grid is in broad terms, talking about the research relevant to that area, and the benefits the grid brings to it. Coordination of attendance at events between the communications, user community support and policy teams and the NILs will be important for maximising impact. This will help to increase EGI's visibility at national or international events which NILs may already be attending. NILs may also bid to host booths at international events that will be organised and funded from the project central dissemination budget, such as International SuperComputing ISC12 in Hamburg. This will reduce travel costs for the central team, increase the number and range of events that can be attended, and give NGIs the opportunity to publicise their national work at events with large numbers of delegates.

4.2   Main website and web design

The EGI website, re-launched in March 2012, is now more visually appealing and has a layout that is designed to encourage audiences to stay on the site to read the material in more depth. The new design also improves how the information is laid out and communicated, and provides a visual hierarchy of where a new visitor's attention should be drawn to first, especially on the homepage. Information is now more clearly signposted for its particular audience, whether new users, existing users, policy makers, general public and so on.

There are more opportunities presented for audiences to engage with EGI through new social media features incorporated throughout the site, allowing content to be shared easily. Analytic tools have also been incorporated to make this engagement measurable. In addition, the new website is designed to be user-friendly when viewed through mobile devices and has a specially defined style for printing via desktop printers.

In Year 3, the engagement with the website through blog comments, social media sharing and time on the site will be tracked through the web analytics. Further major changes to the layout are not anticipated, but feedback will be sought from attendees at events and through surveys, so that adjustments can be made where needed. Further images and case studies will be added to the website during the course of the year, and Virtual Teams will be set up around new content areas, such as a federated clouds area. Updates to the templates will include any adjustments needed to ensure that accessibility criteria are met as fully as possible, for example with additional CSS templates for mobile, low graphics, pdf and print versions.

4.3 Materials and publications

The communications team will produce a number of deliverables during the course of the project in the area of publications:

D2.16 EGI-InSPIRE presentation [R5]
Using the project's presentation template provide a public presentation on the website that describes EGI-InSPIRE's past, present and future planned activities. This will also include details on the consortium and infrastructure. The presentation will be substantially updated each year.

D2.17 EGI-InSPIRE paper [R6]
A public white paper that describes in more depth the activities and plans taking place within EGI-InSPIRE. The paper will provide a reference that will be used by the community to describe the organisational structure, technical architecture and support model within the project. The paper will be updated after two years.

In addition, the EGI.eu communications team will also continue to produce a quarterly newsletter which is no longer a project milestone but produced in February, May, August and November. This is distributed by email to the all-project mailing list as well as everyone registered in the SSO database, and will also be available by subscription and on the project website, and on collaborating websites such as scienceomega.com.

Each month, the team produces a monthly Director's Letter on behalf of the Project Director, which is issued to the all project mailing list and published on the website. Subject specific brochures focused on particular research fields and events will also be produced, such as the earth sciences and health sciences brochures, and a brochure focusing on bioinformatics for European Conference on Computational Biology in September 2012.

In addition to the project publications, the communication team also targets articles about EGI and the scientific work achieved using the infrastructure at other trade publications and project newsletters. In particular, articles will be targeted at the 8000 subscribers to *iSGTW*, and to policy focused publications such as *The Parliament*, *Pan European Networks* and *Public Service Review*. Use cases will also be developed as articles and blog posts for blogs such as GridCast and the EGI blog.

4.4 Media and public relations

EGI.eu on behalf of EGI is working on a portfolio of materials that can be used both as an introduction to the grid for a new community but also for the general public. The package is called "Stories from the grid" and includes posters, brochures and videos with links to more in-depth information depending on individual interest and technical knowledge. These can be promoted to the media through press releases targeted to individual journalists or through AlphaGalileo.

EGI has established media partnerships with iSGTW and with Tabor Communications, which produces HPCwire, HPC in the cloud and new data publication Datanami. These publications publicise the events through web banners on their websites, and are invited to send journalists to report

onsite from the event, which can lead to stories being picked up by the wider media. These partnerships will continue during Year 3, covering the EGI Technical and Community Forums. In addition, EGI has signed a new media partnership agreement with Hostingtecnews.com who are currently media partners for the European Commission's Digital Agenda and 7th Framework Programme and who have a newsletter database with 400,000 subscribers from more than 30 European Countries, USA and Asia.

EGI will also work to establish connections to individual journalists, for example through contacts established with journalists at the BBC World Service and the Times Higher Educational Supplement, which have been developed through attending and organising media training. In addition, the idea of an essay competition for PhD and early career scientists will be explored.

4.5 Social media

Social media is becoming more and more a part of any company's communications toolkit. In the last year EGI has been working on leveraging these newer channels for engaging both the existing community but also people outside its traditional audience. Although focusing on FaceBook and Twitter, and its self-hosted blog, EGI also has a presence on Google+, LinkedIn, YouTube and Flickr (for a full list visit http://go.egi.eu/smc).

The main change to the way the project uses these channels is that the content is now segmented by audience interest. Using the well-defined teams in EGI as a starting point the four chosen areas are: Policy, User Community, Technology & Operations and General. This change was to allow the individual to decide what kind of information is relevant to them. This was already partly implemented on the EGI blog through the various tags, feeds and authors present there.

Now all content produced by EGI is filtered through these categories from news items, blog posts, individual's twitter feeds. More importantly all the generated content is now available on the individual's channel of choice, whether that be via RSS feed, directly on the EGI website, FaceBook or Twitter.

As well as making it easier for people to receive news from EGI, the new website also makes it easier for people to share our content via social media channel(s) of their choice (they can choose from more than 300 channels) using a 'catch all'-type share button on the top of every webpage. In addition, a more prominent share button is available on every news and case study article page to encourage them to share those particular pages.

In Year 3, the EGI social media channels will continue to form a basis for the community building efforts around EGI events, and will be used to launch competitions and viral campaigns.

5 IMPLEMENTATION

Method	Procedure	Quantity	Audience	Timing
EGI website	Link included in all dissemination material		All	Continuous update
Case studies	Translations by partners into local languages Electronic versions for download from website Hard copies for distribution at events and in Press Packs	Approximately 20-30 different case studies Monitor downloads	• Journalists • General public • New and existing user communities including business • Resource providers • Collaborating projects • Decision makers • Government representatives	Regular updates, at least every 2 months or for specific events e.g. EGI-InSPIRE forums.
EGI-InSPIRE general brochure	Translations by NA2 partners into local languages Electronic versions for download from website Hard copies for distribution at events and in Press Packs	Distribution at major EGI events 2000	All	Update annually
Community specific brochures	Translations by partners into local languages Electronic version for download from website Hard copies for distribution at events and in Press Packs	500	All	For distribution at events
Communication Forum Book of Abstracts	Hard copies for distribution at events Electronic for download from website	200	Scientific users	Created once per year for the Communication Forum
General posters A0 • Overview • Community specific • Case studies	Hard copies used at conferences and exhibitions for branding	200	All	Regular updates, especially for events
European Commission - initiated dissemination	Created as required (e.g. press releases, news bulletins, brochures, success	As requested	All via EC dissemination channels	As requested

activities	stories, posters, web-based publications, multimedia materials etc.)			
News releases (central)	Translations by partners Central media list distribution Local media lists of NILs Press Offices of EGI-InSPIRE partners	40	Public and users communities via specialist and non-specialist media	As appropriate for • EGI-InSPIRE events • News-worthy applications • Project milestones • Success stories about current users to promote to new users
News releases (local)	Issued by local partners	As appropriate	Regional areas via media	As appropriate for local events and newsworthy information
Inspired newsletter	Electronic mailing to EGI-InSPIRE mailing list. Downloadable from website	16 (quarterly for 4 years)	New and existing users	Quarterly
Director's letter	Electronic mailing to EGI-InSPIRE mailing list. Downloadable from website	48 (monthly for 4 years)	Project partners Decision makers	Monthly
Publications and magazine articles	Creation of tailor-made articles for media partner publications and targeted media channels (eg *iSGTW*, *HPCwire*, *PanEuropean Networks*)	Up to 150	Public, new and existing users.	Related to news releases, events and project milestones or in response to requests.
Press clippings	Gathered and available online	As appropriate	All	Distributed through the website and promoted through presentations and reports
Event participation	Presentations Booths Material	At least 1 large event and 2-3 smaller events per year	New and existing users and resource providers	Both user and IT events, eg Technical and Community Forums, SuperComputing series
Branded merchandise	Produced for events	As appropriate for size of event	Event attendees eg users	Linked to events programme eg EGI

				forums
EGI-InSPIRE multimedia	New series of 'Stories from the Grid'	3 per year	All	Linked to events programme

6   QUALITY METRICS

The quality metrics for the dissemination task should be set into context by relating them to the overall project objectives:

Project Objectives	Summary
PO1	Expansion of a nationally based production infrastructure
PO2	Support of European researchers and international collaborators through VRCs
PO3	Sustainable support for Heavy User Communities
PO4	Addition of new User Communities
PO5	Transparent integration of other infrastructures
PO6	Integration of new technologies and resources

The specific quality metrics relating to NA2.2U are listed below:

Metric ID	Metric	Public / Internal	Task	Comments/ Explanation
M.NA2.1	Number of press releases issued	P	TNA2.2	Either centrally or nationally
M.NA2.2	Number of media contacts sent press releases	P	TNA2.2	Through AlphaGalileo or other means
M.NA2.3	Number of press cuttings relating to EGI, EGI.eu or EGI-InSPIRE	P	TNA2.2	Tracked through Google alerts and other means
M.NA2.4	Number of interviews given to media organisations	P	TNA2.2	Contributed from each NGI and partner
M.NA2.5	Number of papers published by users of EGI	P	TNA2.2	Contributed from each NGI and each VRC
M.NA2.6	Public events organised by EGI.eu & NGI teams	P	TNA2.2	Measured in events and event person days
M.NA2.7	Events with EGI presence (stand, presentation, or literature)	P	TNA2.2	Measured in events and people reached (i.e. those attending the event)
M.NA2.8	Number of unique visitors per month on the main websites	P	TNA2.2	Measured by Google Analytics

The success of the communications activity will be measured in reference to these quality metrics, which will be gathered through the Quarterly Reports and the NILs. Achieving a high level of success will also depend on how effectively it has tackled its critical success factors, outlined in Section 1.4. Some of the assessment criteria for these success factors are listed below.

Critical success factor, from section 1.4	Measurement of success
Effective communication within NA2 For a project of this size it is vital that NA2 partners maintain good communication channels.	• Established mailing lists within NA2 • Regular phone and face-to-face meetings with task leaders and NA2 partners • Forum for ideas e.g. mailing lists and evidence of ideas being put into practice e.g. metrics • Gathering of best practice guidelines for events, resources etc. to provide a bank of Europe-wide sustainable resources
Close collaboration with NA1 and the Policy team. A close working relationship is essential to ensure messages are accurate and consistent across the whole project.	• Established meetings and exchanges • Evidence of consistent messages within deliverables and publications • Creation of websites for EGI-InSPIRE events
Build on the user community support networks. Use networks reached through the user support activities to disseminate the project's messages as widely as possible and to foster new user communities. The communications and community teams and NILs must also coordinate their attendance at events in order to reinforce each other.	• Established meetings and exchanges • Adding dissemination material to training resources to show trainees what is available when promoting the project • Use conferences and events to coordinate outreach actions to new users
Clear internal communication of what NA2 requires from the other activities to achieve its aims. Communicate what NA2 needs from the other activities to achieve success e.g. timely input of information, regular updates of project webs, leads to potential new users or scientific fields, suggestions for events to attend, early notification of press opportunities, details of key achievements.	• Active participation in fortnightly Activity Management Board (AMB) meetings to source content for newsletter and *iSGTW* articles • Utilising content of quarterly reports for dissemination e.g. newsletter, case studies and *iSGTW* articles • Profit from EGI-InSPIRE conference sessions and booths for internal communication
Manage expectations through clear communication of the task's implementation plan. The activity will concentrate its resources where it can achieve the biggest wins for the project.	• The implementation plan (section 5 of this public document) will be available online • Annual updates to the Communications and Marketing Plan through deliverables D2.22 • Suggestions will be gathered from project partners and other task leaders and used to update and refocus the implementation plan to ensure communication is targeted and effective.
Make optimum use of budgetary resources.	• Focus on resources to target new areas not yet

The aim is to achieve high production values at a reasonable cost, with re-use of content across a wide range of media e.g. press releases, web, blogs, publicity materials.	addressed in earlier materials, with an emphasis on new users.
Build a sense of community. The dissemination activities should foster a sense of community among new and existing users and also between the activity partners.	• Target EGI-InSPIRE forums • Disseminate branded materials to cultivate a sense of community • Liaise with e-ScienceTalk use web-based community tools e.g. blogging, profiles etc. • Continue to coordinate social media tools such as Twitter, Facebook, LinkedIn, wikis etc.
Reinforce realistic expectations of grid technology. NA2 should communicate both the benefits of grid and DCI technology and also its current limitations.	• Liaise with user support activity • Liaise with Heavy User Communities activity • Use case studies as examples of what is possible using grid and cloud technology

In addition, the communications team will contribute to gathering the strategic metrics outlined in D1.9 Quality Plan and Project Metrics, such as tracking the number of scientific papers produced by partners. [R11]

7 CONCLUSION

This Communications and Marketing Plan is a work in progress and will be updated annually through the project in order to provide an up-to-date resource for project partners and collaborating projects, in Year 3 through Deliverable D2.22. The development of the Communications and Marketing Plan will be coupled to the milestones relating to the review of the website, MS231, MS242 [R2], and also the annual updates to the Communications Handbook, MS228, MS238.

8 REFERENCES

R 1	D2.14 Annual Report on EGI and its External Relations Activity https://documents.egi.eu/document/1069
R 1	MS207 Review of the website https://documents.egi.eu/document/179
R 2	MS202 Project presentation template https://documents.egi.eu/document/35
R 3	MS204 EGI-InSPIRE newsletter https://documents.egi.eu/document/146
R 4	D2.1 EGI-InSPIRE presentation https://documents.egi.eu/document/43
R 6	D2.3 EGI-InSPIRE paper https://documents.egi.eu/document/201
R 7	MS204 EGI-InSPIRE newsletter https://documents.egi.eu/document/146
R 8	MS201 EGI Website https://documents.egi.eu/document/126
R 9	MS501 Establishment of the EGI software repository and associated tools https://documents.egi.eu/document/46
R10	MS304-User Support Metrics https://documents.egi.eu/document/941
R11	D1.9 Quality Plan and Annual Metrics https://documents.egi.eu/document/1071
R12	D2.30 Strategic Plan https://documents.egi.eu/document/1098