



EGI-InSPIRE

COMMUNICATIONS AND MARKETING PLAN

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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 within 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.



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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.



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1 INTRODUCTION

The communications and marketing plan provides an overview guide to the outreach activities for EGI-InSPIRE and EGI.eu. 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. This document is an update of D2.15¹ submitted in PQ8.

The aim for task NA2.2 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 is targeted at EGI-InSPIRE partners contributing to Global communication tasks and Virtual Teams, but also to other EC-funded projects involved in dissemination.

Two other documents complement this communications plan, the Marketing and Communication Handbook², and the Community Outreach Strategy³. The Marketing and Communication Handbook gives an overview of the practical elements relating to marketing, design and branding for EGI as well as the services provided by the central communications team. The Community Outreach Strategy outlines the strategies and means for successfully building and expanding EGI's community.

1.1 Aims of the Communications and Marketing Plan

The main aim of the Communications and Marketing Plan is to outline how the Communications Team will disseminate EGI's outcomes across Europe and internationally.

Specifically this document 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.eu

The EGI Global task is coordinated and carried out by EGI.eu in Amsterdam, and contributes 96PM to task TNA2.2. Currently the task is managed by the Deputy Director but in future will have a dedicated

¹D2.15 Communications and Marketing Plan - <http://documents.egi.eu/secure/ShowDocument?docid=1070>

²MS228 Marketing and Communications Handbook - <http://documents.egi.eu/secure/ShowDocument?docid=1160>

³ EGI Community Outreach Strategy - <http://documents.egi.eu/secure/ShowDocument?docid=1554>



manager to coordinate staff and activities undertaken within EGI.eu, the NGI International Liaisons and EGI Champions Network. The EGI.eu team consists of professional science writers and designers with experience working in both the grid and science communication communities. The EGI Global Task also administers the budget for stands at major exhibitions, central printing of posters, leaflets, booklets and other promotional materials.

1.2.2 NGI International Liaisons and Virtual Teams

The NGI International Liaisons (NILs) are a network of contacts at NGIs that are responsible for non-operations tasks. They are funded through the NA2.1 and NA2.6 tasks within EGI-InSPIRE and are used as a two-way communication channel with the NGIs. They allow EGI to draw on the embedded knowledge at the NGIs in the areas of communications and marketing, strategic planning and policy support, community outreach and technical outreach to new communities. The NILs provide content for the communications team such as news items, case studies, and images, alongside event suggestions and support. The NILs are described more fully in D2.14⁴.

1.2.3 EGI Champions Network

The EGI Champions are a network of subject and grid 'experts' available on the ground to provide help to individuals in their own research environment. They provide a more informal support role to both their community and EGI. They provide users and potential users with role models for grid usage that is relevant to their work. The scheme is the result of a Virtual Team (see 1.3.1) and at the end of PY3, nine champions have been recruited to the scheme⁵, covering a wide range of disciplines and countries.

As members of a particular research community, they are well placed to provide a communications channel for that community. The communications team has approached them for feedback on the material produced while at the Community Forum in Manchester and has invited them to suggest/attend discipline specific events that EGI should have a presence at, such as the 9th European BioPhysics Congress EBESA2013 in Lisbon in July 2013 where EGI will have a booth. Footage of the Champions discussing their usage of EGI will also feature in the next video in the 'Stories from the Grid' series, due to be released in July 2013

1.2.4 Collaborating projects

EGI.eu has 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 infrastructures⁶. The majority of these MoUs include milestones for collaboration in the area of communications, such as announcing the collaboration through relevant channels, hosting mutual links on websites, organising joint events and publishing materials in project

⁴ D2.14 Annual Report on EGI and its External Relations Activity - <http://documents.egi.eu/public/ShowDocument?docid=1069>

⁵ http://www.egi.eu/community/egi_champions/

⁶ <http://wiki.egi.eu/wiki/Agreements>



newsletters. These activities are reported annually through milestone reports for each project^{7, 8}. 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.

1.3 Activities

1.3.1 Virtual Teams

The Virtual Teams (VT) are ad-hoc, short term, working groups created to solve individual issues in the EGI ecosystem. A VT consists of by like-minded individuals from the NGIs with an interest in the particular problem. Recruitment and advertisement of the VTs is done through the NILs network.

Some of the outputs from the VTs can be used as the basis for material produced by the communications team. For this reason the team has been active in or led some of the VTs, including:

- Scientific Publications Repository⁹, designing and implementing a process to track scientific publications produced using EGI resources.
- Inter-Usage Report¹⁰, to produce a report detailing the usage of computing resources by the NGIs.
- EGU-GA-2012¹¹, to organise a high impact presence for EGI at the 2012 European Geosciences Union (EGU) General Assembly.
- Website Content¹², to improve the website structure, content and navigation.
- Environmental & Biodiversity Virtual Team¹³, to collect information about the Environmental and Biodiversity research communities and begin the process of creating a VRC for them.

The Communications Team will continue to participate in the VTs that are still active during PY4, such as the Scientific Publications Repository VT, and will propose new VTs as needed.

1.3.2 Partnerships

EGI.eu is or was a funded partner in the BioVeL¹⁴, BioMedBridges¹⁵, e-FISCAL¹⁶, ENVRI¹⁷, FedSM¹⁸, HelixNebula¹⁹, ER-flow²⁰ and Digital Cultural Heritage²¹ (DCH-RP) projects. Through its

⁷ <http://documents.egi.eu/document/894>

⁸ <http://documents.egi.eu/document/931>

⁹ http://wiki.egi.eu/wiki/VT_Scientific_Publications_Repository

¹⁰ http://wiki.egi.eu/wiki/VT_Inter-Usage_Report_part_II

¹¹ http://wiki.egi.eu/wiki/VT_EGU-GA-2012

¹² http://wiki.egi.eu/wiki/VT_Website_Content

¹³ http://wiki.egi.eu/wiki/VT_E_and_B

¹⁴ <http://www.biovel.eu>

¹⁵ <http://www.biomedbridges.eu/>

¹⁶ <http://efiscal.eu>

¹⁷ <http://www.envri.eu>

¹⁸ <http://www.fedsm.eu>

¹⁹ <http://helix-nebula.eu/>

²⁰ <http://www.erflow.eu/>



involvement in these projects, EGI is 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 EGI.eu involvement includes small amounts of funded marketing and communication effort in e-FISCAL, ENVRI and HelixNebula projects.

EGI also holds regular meetings with its communications 'industry' peers in the e-Infrastructure arena i.e. the e-Infrastructures Reflection Group²², TERENA²³, Open Grid Forum²⁴ and DANTE²⁵ to collaborate on materials for websites and newsletters, events announcements and to benchmark our social media activities.

For the last 3 years EGI.eu also coordinated the e-ScienceTalk²⁶ project, which communicated the results of e-Infrastructures, such as EGI, to the general public, policy makers, scientists and students. Although that project closes in July 2013, the collaboration with e-ScienceTalk was particularly productive, including mentions in the weekly magazine iSGTW²⁷ that were picked up by the general media, such as *Symmetry*²⁸, *Discover News*²⁹ and *Wired*³⁰. The e-ScienceTalk team also covered EGI resource providers through the GridGuide³¹, which is a website showing the sights and sites involved in grid computing around the world. E-ScienceTalk also provided media support at the two annual EGI Forums, through blogging and filming videos, published via the GridGast³² blog. The communications team will still collaborate with iSGTW and hopes to continue some of the GridCast activities at the annual Forums.

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:

Internal organisation

- **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.

²¹ <http://www.dch-rp.eu/>

²² <http://www.e-irg.eu>

²³ <http://www.terena.org/>

²⁴ <http://www.gridforum.org/>

²⁵ <http://www.dante.net/>

²⁶ <http://e-sciencetalk.org>

²⁷ <http://isgtw.org>

²⁸ <http://www.symmetrymagazine.org/breaking/2012/04/18/listening-for-the-sound-of-science>

²⁹ <http://news.discovery.com/space/making-music-with-the-sounds-of-symmetry-120419.html>

³⁰ <http://www.wired.com>

³¹ <http://www.gridguide.org>

³² <http://www.gridcast.org>

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

Project organisation

- **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.
- **Clear internal communication of what the communications team requires from the other activities to achieve its aims.** Communicate what the communications team 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.

Community

- **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, champions and the NILs must also coordinate their attendance at events in order to reinforce the impact of EGI's presence.
- **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.** EGI should communicate both the current benefits of grid and DCI technology and also which new user requirements could be satisfied in the future.

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 audiences have been identified. These are defined as primary, secondary and tertiary audiences based on the resources available to target them, and the potential impact of on overall usage of the infrastructure and the priority with which they will be addressed. Within each category, the audiences are of equal priority and importance

Primary audiences:

- Research communities (including new user communities such as social sciences, environmental sciences, humanities and existing user communities such as life sciences, physics, computational chemistry)
- Collaborating projects and policy makers (including governmental representatives)
- National Grid Initiatives (NGIs) and European International Research Organisations (EIROs)
- Media and general public

Secondary audiences

- Developer community
- Resource providers
- General public

Tertiary 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 primary customer and the grid's sustainability relies on an engaged and broadly satisfied user community. The researcher community includes new user communities such as social sciences, environmental sciences, humanities and existing user communities such as life



sciences, physics, computational chemistry. Some communities such as life sciences are supported by well organised, Virtual Research Communities. Other communities are more dispersed, both geographically and across different disciplines and need to be targeted more from a bottom up rather than top down approach. Still other communities are not aware of grid computing at all, and its potential, and are hence the most difficult to reach. Supporting research communities already established within EGI is a major role for the Virtual Research Communities. EGI.eu has many years' experience and contacts both in the technical and communications field and is able to support and assist the VRCs to achieve this. The NILs and the Champions are important networks for reaching out to less well-structured communities, and communities who are not yet aware of grid.

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 Orchestra³³, led by DANTE, the Computational Chemistry super users and the WeNMR³⁴ 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 challenge 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 that is typical 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 in the long term. One example of the impact that this long term involvement is able to achieve is with the hydrometeorology research community, which has now signed an MoU with EGI³⁵.

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 e-Infrastructures 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 currently 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). The grid community will work to gather these new user requirements with the aim of meeting them in the future where appropriate and possible. 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

³³ <http://www.lostsoundsorchestra.org/>

³⁴ <http://wenmr.eu/>

³⁵ <http://www.egi.eu/community/collaborations/HMRC.html>

communities is when EGI.eu is perceived as being important, respected, authoritative and adding value by its users and customers. EGI itself should also be seen as useful, necessary convenient, fit for purpose and ubiquitous. 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. These indirect indicators are tracked through the event feedback surveys and event statistics, as well as the quarterly metrics and reports, for example

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.
- 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 MoUs³⁶ to publicise grid tools and services to their user communities.
- Work with the EGI Champions to target new user communities on the ground.

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 valuable solution would be to introduce grid concepts inside the already defined user’s workflow to improve and speed it up (for example a sub-set of the researcher workflow could be improved by exploiting grid capabilities). In this way the “grid” adapts itself to satisfy user requirements and not vice versa. 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 champions in the various academic fields is needed to widen EGI’s influence at events. Other significant audiences that could be targeted include the developer community, who produce applications and middleware. This will be extremely important as EGI moves to a platform model in which the substantial benefit or value-add of EGI will be to allow developers to build on top of EGI.

2.2 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.

³⁶ <http://www.egi.eu/community/collaborations/>



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. Collaborating projects are able to promote EGI and its added value to their funders and audiences, and so it is important that these projects are fully aware of EGI and its impact and are confident to work with EGI on roadmaps for the future. 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, communicate what we do to other policy makers at high level meetings and broadly support us. In the process, EGI will address their high-level vision and missions within 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, PanEuropean Networks and the e-IRG newsletter.
- Maintain a high profile attendance at policy-related events, such as eChallenges, SciTech Europe, European Parliament events, EC consultation events and the European Innovation Summit.
- Work on joint roadmaps and scientific use case documents with collaborating projects

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 ICT'13 and the European Innovation Summit.

2.3 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. They are also key contact points with their users, which often number in the thousands or tens of thousands in the case of EIROS such as EMBL. 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.eu 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.

2.4 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 using 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?

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. 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 and Champions 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 and from announcements, particularly the announcement of the discovery of the Higgs particle in summer 2012.

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. A MoU has been signed between WLCG and EGI, and covers joint outreach activities. 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 and iSGTW to Discovery News and Wired US.

2.5 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 Plan³⁷.

In practice, EGI's strengths will be continued to 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 to the strategic plan as listed below. This includes both helping to achieve EGI's strategic aims for NGIs, policy makers and collaborating projects, but also leveraging the new channels such as the NILs and EGI Champions to achieve EGI's own communications goals within the strategy:

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 and Champions*: strengthening the NIL and Champions networks to build a grass roots infrastructure for community engagement, technical outreach and communication.

³⁷ D2.30 EGI Strategic Plan - <http://documents.egi.eu/public/ShowDocument?docid=1098>



Operational infrastructure

- *Researchers and Champions*: 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 and Champions*: 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 top level project 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;
- The work of the community to meet rising needs in the scientific world.

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 from the set of top level messages are conveyed to the audiences they have identified. Some example specific messages include:

For researcher communities:

- EGI provides 370,000 processor cores and more than 170 PB of disk storage to 22,000 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 collaborating projects and policy makers:

- 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.

For the media and 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.



4 MEANS FOR COMMUNICATION & MARKETING

EGI needs to “go to the user” and this requires engaging disciplines with targeted content and information through specific channels (see the Communications matrix, Section 5). This will mostly be through event attendance and material production. The communications team will also engage the other audiences through similar channels and products. New channels are identified through collaborations with other projects, and by working with the NILs and the EGI Champions. For example this has led to monthly and bi-monthly bulletins targeted at the NILs and Champions. Social media channels such as Facebook, Twitter, Pinterest and Google+ are also closely monitored for new developments, and tools for assessing the impact of these channels are also assessed by the central team on a regular basis e.g. Klout³⁸. Similarly, social media trends such as infographics, gamification and crowdsourcing of content will be explored in PY4 to reach out to our key user groups.

4.1 Events

The communications team will continue to support the two annual Forums and other internal events. However its focus will be on supporting EGI involvement in events aimed at individual scientific disciplines. The team will work with partner projects, VRCs and the NILs and Champions networks to increase EGI’s visibility at national or international events. This could be through helping with content for a Champion’s presentation at a local seminar to funding a booth at a major international event staffed by members of a VRC or a NIL. This will reduce travel costs for the central team and increase the number and range of events that can be attended.

4.2 Materials

The work here will build on the catalogue of materials produced in the last three years. This will include creating new products as requested/needed but also updating existing products. Both creation and maintenance of the products will be done with input from members of the EGI.eu staff and other stakeholders. In particular the Champions will be asked to advise on the content of material aimed at their community.

4.2.1 Stories from the grid

The “Stories from the grid” series is a portfolio of audience specific materials. It includes posters, brochures and videos aimed at the non-technical user³⁹. They follow a simple template of discussing what the grid is in broad terms, talking about the research, and the benefits the grid brings to it. These will also be used to engage the public and general media and be promoted through press releases, targeted to individual journalists or through AlphaGalileo.

4.2.2 Case for EGI

The communications team is producing a concise and targeted brochure aimed at policy makers that is based on the EGI Strategic Plan. The brochure will use high production values to communicate clearly to policy and decision makers the added value of EGI.

³⁸ <http://klout.com/home>

³⁹ <http://www.egi.eu/news-and-media/videos/>



4.2.3 Annual Report

The communications team will issue annual reports at the end of each project year to summarise the work done by EGI.eu and EGI-InSPIRE throughout the year, including activity reports and financial information.

4.3 Main website and web design

The EGI website was re-launched in March 2012, to be 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 team will continue to tweak the design and content to ensure visibility of the most important aspects of the site. The site also includes the ability for audiences to engage with both EGI and the content of the site through various social media features incorporated throughout the site allowing content to be shared easily.

Moving forward the team will maintain the relevance and usefulness of the site by ensuring that more resources like case studies, images and guides to the infrastructure are added.

4.4 Publications

The EGI.eu communications team produces two regular internal publications, contributes to external publications and provides deliverables for the project.

4.4.1 Newsletter

The Communications Team produces a quarterly newsletter aimed at the community, containing relevant information and links in an easy to digest format. Usually containing ten articles of 600 words each with the occasional longer, more in-depth piece, the newsletter is no longer a project milestone and is distributed through the MailChimp⁴⁰ platform to track readership figures and as a PDF. The articles are available individually as pages on the website and promoted through the social media channels.

4.4.2 Directors Letter

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. This publication is internally focused to communicate key news items and events to the project participants, rather than to an external audience.

4.4.3 Dispatches

The communications team produces a very short monthly email highlighting tasks, requests and information that is sent to the NILs. This "dispatch" was created as a result of feedback from the NILs and has proved very popular. Containing five or six items of about 30 words each it has made it easier to communicate what EGI wants from the NILs. Gathering the content for each dispatch also works as a reminder to the EGI.eu team to communicate news/activities for communication via the external facing channels.

⁴⁰ <http://mailchimp.com/>



The Communications Team are investigating creating similar dispatches aimed at the Champions (bi-monthly) and the developer community that use the recently launched Community Software Repository⁴¹ (quarterly), which will also be distributed to the NILs and management team

4.4.4 External 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 produced for *iSGTW*⁴², and to policy focused publications such as *The Parliament*, *Pan European Networks* and *Public Service Review*.

4.4.5 Deliverables

The communications team will produce a number of deliverables during the course of the project in the area of publications. In PY4 the remaining Deliverables are:

D2.23 EGI-InSPIRE presentation

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.

Communications outcomes will also feed into the final report on External Relations activities at the close of PY4, and the final project report.

4.5 Media and public relations

EGI has renewed media partnerships with Tabor Communications for PY4, which publishes HPCwire⁴³, HPCintheCloud⁴⁴ and Datanami⁴⁵. These publications publicise EGI events through web banners on their websites, and are invited to send journalists to report onsite from the events, which can lead to stories being picked up by the wider media. These partnerships will continue during PY4, covering the EGI Technical and Community Forums or other relevant workshops.

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.

4.5.1 Press releases

A main route to reaching out to the press and general public is through the judicious release of press releases, when this is relevant and interesting to the particular publication's audience, or the journalist involved. As outlined in Section 2 above, the central EGI team is reliant on support from the NILs and Champions in reaching out to their local journalists and making good use of the resources and facilities that they have available. EGI also works with collaborating projects such as Globus to release press announcements and event announcements at a project level. Press releases need to be

⁴¹ http://www.egi.eu/blog/2013/04/15/egi_applications_database_as_a_community_software_repository.html

⁴² www.isgtw.org

⁴³ <http://www.hpcwire.com/>

⁴⁴ <http://www.hpcinthecloud.com/>

⁴⁵ <http://www.datanami.com/>



fresh to qualify as ‘news’ and the communications team often receives stories quite “late” from a journalist point of view. However by working with collaborating publications such as iSGTW and HPCwire over the long term, EGI is able to place feature articles that are not dependent on a news hook directly with targeted publications, often based on the case studies first published on the website.

4.6 Social Media

Social media is becoming more and more a part of any company’s communications toolkit, and drives an increasing proportion of traffic to the EGI website. 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 Flickr⁴⁶.

The main change made in PY3 to the social media was 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 allows an individual to decide what kind of information is relevant to them.

In PY4, the EGI social media presence will be strengthened and improved, particularly in the Policy, User Community, Technology & Operations areas which currently have lower engagement levels than the main social media channels. Working with the relevant teams at EGI.eu these will be used to form a basis for the community building efforts around EGI events, and will be used to launch competitions and viral campaigns.

⁴⁶ <http://go.egi.eu/smc>

5 IMPLEMENTATION

Method	Purpose / Specs;	Length	Audiences	Timing	Distrib	Format
Community Specific Brochures	a) 3 success stories from a particular discipline/field to showcase EGI to that community b) 3 discipline/field specific applications from the AppDB to showcase the tools available to that community	~500 words	Research Communities	3 per year	Print	Paper
Case studies	a) Account of a (published) piece of research possible thanks to EGI; b) First-person account of an on-going research project possible thanks to EGI;	~700 words	General public	12 / year	Website	Online
Case for EGI	The value of EGI as an infrastructure for science in Europe	~12 pages	Decision makers	One-time	Print, website	Paper, PDF
NIL Dispatch	A monthly list of 5-6 action points (ca. 30 words each) for the NILs, with suggested activities in the context of their NIL role.	~200 words	NILs	Monthly (mid)	MailChimp	Mail
Champions	3 – 4 points of	~150	Champions	Every 2	MailChimp	Mail

Dispatch	interest for the Champions to foster a community among them and to get input to various EGI products	words		months		
Developers Dispatch	3 – 4 points of interest for the Developers to foster a community among them and to get input to various EGI products	~150 words	Developers	Quarterly	MailChimp	Mail
External Publications	Providing content to partners/other publications such as GÉANT's CONNECT, iSGTW, PanEuropean Networks	As needed	Readership of publication	As needed	Variable	Variable
Attendance at External Events	Providing materials, posters, web banners as required	As needed	Conference delegates	As needed	Variable	Variable
News Feed	What is new in and around EGI? Community news, events, announcements, updates from partners and other projects	~300 words	General public, EGI	2-3 news per week	Website	Online
Newsletter	Articles about the EGI community by the EGI community. Focus on achievements/	10 -12 pages (500 word articles)	EGI, general public (minor)	Quarterly	Website, news, MailChimp	Online; PDF

	decisions/talking points important for the collaboration.					
Press releases	Announcements of significant EGI achievements / milestones, written for the media.	~300 words	Media contacts	As needed	Mail, website	Online
Social Media	Short updates of what is new in EGI.	~300 Characters	General public	Daily	FB, TW	Online
Annual Report	High-level account of the EGI yearly achievements, strategy statement, key numbers, state-of-the-art of EGI	36 Pages	General public, EGI, decision makers	Yearly	Print, website	Paper, PDF
Director's Letter	The director's monthly summary of EGI.eu activities, announcements of future activities / achievements, upcoming events.	~400 words + table of events	EGI	Monthly (end)	Mail, website	PDF
Blog posts	Updates from the EGI community.	Variable	EGI	As needed	EGI Blog	Online
Annual Forums	Including website, programme, design, artwork	Variable	Forum delegates	2 times per year	Variable	Variable

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
INTERNAL ORGANISATION	
<p>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, publicity materials.</p>	<ul style="list-style-type: none"> • Focus on resources to target new areas not yet addressed in earlier materials, with an emphasis on new users.
<p>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.</p>	<ul style="list-style-type: none"> • 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.
<p>Effective communication within the communications team For a project of this size it is vital that communications partners maintain good communication channels.</p>	<ul style="list-style-type: none"> • Established mailing lists within NA2.2 • Regular phone and face-to-face meetings with task leaders and NA2.2 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
PROJECT ORGANISATION	
<p>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.</p>	<ul style="list-style-type: none"> • Established meetings and exchanges • Evidence of consistent messages within deliverables and publications • Creation of websites for EGI-InSPIRE events
<p>Clear internal communication of what the communications team requires from the other activities to achieve its aims. Communicate what the communications team 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.</p>	<ul style="list-style-type: none"> • Active participation in fortnightly Activity Management Board (AMB) meetings to source content for newsletter and <i>iSGTW</i> articles • Utilising content of quarterly reports for dissemination e.g. newsletter, case studies and <i>iSGTW</i> articles • Profit from EGI-InSPIRE conference sessions and booths for internal communication
COMMUNITY	
<p>Build on the user community support</p>	<ul style="list-style-type: none"> • Established meetings and exchanges

<p>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.</p>	<ul style="list-style-type: none"> • 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
<p>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.</p>	<ul style="list-style-type: none"> • 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.
<p>Reinforce realistic expectations of grid technology. EGI should communicate both the current benefits of grid and DCI technology and also which new user requirements will be met in the future</p>	<ul style="list-style-type: none"> • 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 D1.13 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 has been updated annually through the project in order to provide an up-to-date resource for project partners and collaborating projects. The development of the Communications and Marketing Plan in the final year will be coupled to the milestones relating to the review of the website and also the annual updates to the Communications Handbook MS238.

8 REFERENCES

R 1	D2.14 Annual Report on EGI and its External Relations Activity https://documents.egi.eu/document/1069
R 21	MS207 Review of the website https://documents.egi.eu/document/179
R 3	MS202 Project presentation template https://documents.egi.eu/document/35
R 4	MS204 EGI-InSPIRE newsletter https://documents.egi.eu/document/146
R 5	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	D1.13 Quality Plan and Annual Metrics https://documents.egi.eu/document/1757
R12	D2.30 Strategic Plan https://documents.egi.eu/document/1098