



D2.1 Communication and engagement plan

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Deliverable Abstract

EGI-ACE is a 30-month project coordinated by the EGI Foundation with a mission to empower researchers from all disciplines to collaborate in data- and compute-intensive research through free-at-point-of-use services.

Building on the distributed computing integration in the EOSC-hub project, EGI-ACE will deliver the EOSC Compute Platform and will contribute to the EOSC Data Commons through a federation of cloud compute and storage facilities, PaaS services and data spaces with analytics tools and federated access services.

In this document all communications and engagement plans will be described, with the related activities and expected results.

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Executive summary

EGI-ACE aims to empower researchers to collaborate in data- and compute-intensive research through free-at-point-of-use services. Ensuring that the project's activities, developments, and outputs are observed by the target audiences and stakeholders, it is crucial to have a clear communications strategy. Ensuring recognition of the work is however not the only important factor to reach the project's objectives. In addition to disseminating content and raising awareness, it is paramount to focus on engagement. The Communications and Engagement Plan provides an in-depth description on how project results, developments and branding will be communicated throughout the project as well as engagement with the targeted audiences, a clear dissemination strategy, and the description of promotion, consultancy, outreach, training and co-design activities.

The document introduces the plan with a stakeholder overview. The main stakeholder categories that are identified are: users, service and content providers for research, EOSC Governance and Core, and peer initiatives. For each of them, specific target groups have been identified. The plan continues with actionable and practical steps to ensure that the main target audiences (users and compute providers) are aware of the services and opportunities the project offers. This will be based on input from the technical work packages (WP3, 4, 5, 6 and 7) which will provide the communication and engagement tasks in WP2 with input about the uptake and onboarding of services, the adoption of use cases, and the development of the data spaces.

There is a great number of actors and activities involved in raising the awareness of the project. Therefore, the project has created a dissemination tracker to easily present which type of engagement and communication activities have been conducted and how many audiences have been reached. Although the D1.4 Dissemination and Exploitation Plan will go into more detail about this tracker, it is worth noting that this tool will serve as an excellent source of information for the communication task as well. Additionally, there is a list of KPIs and objectives that will support the monitoring and evaluation of the planned activities.

With the various activities, training sessions, webinars, attending/organising events, online communication, direct engagement activities, to name a few, the communications and engagement taskforce of the EGI-ACE project aims to ensure all audiences and stakeholders receive the information, knowledge and content they would be interested in, and will become aware on how to benefit from the services and potential collaborations the project offers. The plan will be updated based on the visible results and updated periodically.

1 Introduction

EGI-ACE is a large-scale, multi-organisation distributed project that “strengthens Europe’s capabilities and infrastructures for hosting, processing and using data, interoperability”¹. The project contributes to this vision by enabling all researchers from all disciplines to be empowered to collaborate and to carry out data- and compute-intensive science and innovation across national borders through free at point of use service offerings.

To respond to the proposed general objectives of the EOSC Partnership EGI-ACE will:

- Deliver a free-at-point-of-use distributed compute facility that pools national and international capacities and removes today’s barriers that prevent transnational and cross-disciplinary access to high-end compute facilities.
- Offer a sustainable hyperscale facility with the capabilities and capacities to host large research datasets and data analytics to address the complex digital needs of research.
- Develop the EOSC Compute Platform as an open infrastructure that can expand thanks to the adoption of common technical specifications and management processes.
- Provide a heterogeneous computing infrastructure with different cost and performance systems, which can ensure that communities get the resources they need with the best return on investment for European funding supporting them.

The project builds on:

- (1) EOSC-hub² results, co-design and requirement gathering activities;
- (2) Data and applications from research collaborations;
- (3) The operational capacity and expertise of the EGI Federation

With the established results from previous projects and the EGI Federation³, stakeholder engagement activities can be strongly supported as there are sufficient early adopters to showcase the results of EOSC services on scientific output. New user communities will be targeted during the course of the project, which will be one of the main objectives of the communication task. Additionally, the following activities will play a key role in order to support the project’s general objectives:

- Promote the EOSC Portal⁴ to show the ease of accessing services.

¹ European Strategy for Data, COM (2020) 66 final, 19-02-2020, Pillar B
[https://ec.europa.eu/transparency/documents-register/detail?ref=COM\(2020\)66&lang=EL](https://ec.europa.eu/transparency/documents-register/detail?ref=COM(2020)66&lang=EL)

² <https://eosc-hub.eu>

³ <https://www.egi.eu/>

⁴ <https://eosc-portal.eu/>

- Showcase the importance of the EOSC Compute platform to invite (external) data community services.
- Present the successful onboarding of data spaces.
- Communicate about webinars and training opportunities to improve the uptake within the target groups.

These activities, with support from activities in other WPs, will be intertwined and complement each other, in order to identify prospective stakeholders and engage them into the EGI-ACE environment. Additionally, there are a number of projects from the same call (INFRA-EOSC07⁵) and the EOSC Future⁶ project that will conduct supporting activities, contributing to the EOSC cause. It is therefore important to align the communications and engagement activities with these projects (C-SCALE⁷, DICE⁸, OpenAire Nexus⁹, RELIANCE¹⁰), to reach a wider audience during joint events and cross-project dissemination activities.

Deliverable 2.1 will showcase an initial strategy to maximise the communication and engagement potential, in line with the project's objectives. An updated version of the communication and engagement plan is scheduled one year after the publication of the current version, which will benefit greatly from measuring the impact.

The document is structured as follows:

Section 1: Strategy and methodology, describing the initial steps of the plan including the stakeholder analysis

Section 2: Implementation of engagement activities, describing the detailed planned activities to interact with the identified stakeholders

Section 3: Implementation of communication activities, describing the detailed planned activities to increase awareness of the project and communicate about developments, results and events

Section 4: Events, describing the planned events to be organised and attended

Section 5: Impact indicators and KPIs, describing the monitoring activities of the plan

At the end of the document there is a concise conclusion to sum up the plan and its expected outputs.

⁵ <https://ec.europa.eu/info/funding-tenders/opportunities/portal/screen/opportunities/topic-details/infraeos-07-2020>

⁶ <https://eoscfuture.eu/>

⁷ <https://c-scale.eu/>

⁸ <https://www.dice-eosc.eu/>

⁹ <https://www.openaire.eu/openaire-nexus-project>

¹⁰ <https://www.reliance-project.eu/>

2 Strategy and methodology

Before diving into the action plans, it is important to understand who the actions are directed to and how to maximise the intended impact. For this specific plan, it is essential to conduct a stakeholder analysis in order to understand their importance to the project and vice versa, how to best reach them and how to ensure the engagement and communication activities are sustainable, preferably benefitting the stakeholders even beyond the duration of the project.

2.1 Stakeholder mapping

The project targets a great number of audiences, and a specific set of stakeholders. It is important to distinguish these two from each other, as the audiences are merely receivers of content, while the stakeholders will be affected by decisions and actions, interact with the content, and further exploit potential opportunities.

After an analysis of the stakeholders, we have identified four stakeholder categories: users, service and content providers for research, EOSC governance and Core, and peer initiatives. The following table presents an overview of the stakeholder groups within the categories and their main motivation for engagement with the project.

Stakeholder category: Users	
Stakeholder group	Main motivation for engagement with the project
Researchers	This group wants to access services provided by the project for short term use (< 1 year).
International projects	This group wants to access services provided by the project for mid-term use (<3 years).
Research Infrastructures (RIs)	This group is interested in the service offerings of the project for long term, customised use (>3 years).
Industry/SMEs	This group wants to use the EOSC Compute platform for prototyping applications, and to receive technical support for the integration of applications/platforms with the EOSC Compute continuum.
Public sector	This group is an early adopter of academic compute services and could use the project to access services in the EOSC Compute platform and to receive technical assistance for architecting and implementing compute-setups.
Stakeholder category: Service and content providers for research	

Academic High-Throughput Compute (HTC)/Cloud providers	This group will make use of the project's wider reach to ensure their services are used across borders.
HPC providers	This group will be interested to learn about the project's HPC integration and guidelines and follow them to become providers in EOSC.
Data Space providers	This group will be interested in how to interact with the services offered by the project to offer data spaces (i.e. scientific datasets and applications all integrated on scalable compute platforms).
Stakeholder category: EOSC Governance and Core	
EOSC Association	This group will benefit from the contributions of the project to the EOSC and will be interested in learning about the results, impact and development of the EOSC Compute Platform also with respect to competing/complementing solutions 'out there'.
EOSC Advisory Groups (AGs) & Task Forces (TFs)	This group will be interested in receiving expertise from the project for specific topics to collaborate seamlessly on EOSC matters.
Providers of EOSC Core	This group will be eager to receive feedback and requirements on the services to continuously develop them.
Stakeholder category: Peer initiatives	
INFRAEOSC-07 projects	This group will benefit from the joined activities, promotion and collaboration to further serve the EOSC mission and raise awareness.
GAIA-X¹¹	This group will be interested in learning about approaches to similar activities.
EOSC-like initiatives outside Europe (GOSC)	This group will be interested in learning about practices and technical solutions used/delivered by EGI-ACE to adopt those for the support of computing for Open Science.
EOSC-Future Project	This group will share a similar motivation as the 'INFRAEOSC-07 projects' and is interested in integrating their activities with that of the project where relevant.

Table 1: Overview of stakeholder categorisation and subgroups, including the motivation for engagement

2.1.1 Stakeholder group: Researchers

This is the group of stakeholders that makes use of the services and are the end-users of all EOSC initiatives. All activities in the project aim to support this group, as the intention is

¹¹ <https://www.gaia-x.eu/>

to empower researchers from all disciplines to collaborate in data- and compute-intensive research across borders. By delivering the EOSC Compute Platform and contributing to the EOSC Data Commons, the project services address the needs of this stakeholder group, and therefore it is highly important to ensure engagement and communication activities are targeting the group appropriately.

2.1.2 Stakeholder group: International projects and research infrastructures

EGI-ACE offers a variety of open calls to actively invite international projects and RIs to make use of the offering. Not only do we want to clearly communicate about the services, but also engage these stakeholders by providing training sessions, handbooks and consultancy services. As mentioned before, this stakeholder group also provides an excellent opportunity to reach researchers. It is considered a highly important stakeholder with great influence for interaction with the project output.

2.1.3 Stakeholder group: Industry/SMEs

Commercial entities can be relevant for the EOSC Compute platform as either provider (making commercial services accessible for EOSC via EGI-ACE), users (using EGI-ACE services to e.g. develop new platforms/tools/applications), enablers (giving related work/good practices/reusable services/business models for academic providers in EGI-ACE). Engagement with this sector is not a priority for EGI-ACE, because it's not a priority for EOSC in its current phase of development (See EOSC Roadmap timeline in Figure 1 below), and because the EOSC Digital Innovation Hub¹² of the EOSC Future project is promoted as the front-end of EOSC for industry. EGI-ACE and the EOSC DIH are both coordinated by the EGI Foundation, and the two parties already agreed to work together on commercial support. Particularly, EGI-ACE acts as service provider, supporter, advisor for any 'business pilot' that is supported by the EOSC Digital Innovation Hub (DIH) in the computing area, and the DIH provides visibility to the EGI-ACE services and effort in its communication/engagement activities.

2.1.4 Stakeholder group: Public sector

This group is not considered the main target audience of the project because it is not a main target group for EOSC in its current phase of development (See EOSC Roadmap timeline in figure 1 below). However, the group is still included in this plan as it remains an important stakeholder for any EOSC related content in the long term. Similar to the previous group, success stories and use cases will be of great influence to showcase the importance of open science and its services to scientific output. The project will not provide country-specific reports, but the outputs of data spaces will provide sufficient information for policy makers to understand the impact for their national, regional or international roadmaps.

¹² <https://eosc-dih.eu/>

2.1.5 Stakeholder group: Academic HTC/Cloud providers

HTC/Cloud providers from academia are the core constituencies of EGI. Providers with national/institutional mandates are sitting in the EGI Council, and over 20 of such providers are already in the consortium. Academic providers are tasked by their funding agencies/ministries to support science at the national and/or international level.

The project should keep the already onboarded HTC/cloud providers engaged in the EOSC compute platform delivery and should reach out to currently unrepresented sites and countries to broaden geographical coverage, and compute diversity.

The primary goal for engagement is to establish long-term relationship with the new providers, i.e., sign them up into the EGI Council and reach full integration into the EGI HTC and/or EGI Cloud infrastructures, ensuring commitment for international infrastructure support beyond the EGI-ACE project. A secondary option is MoU-based integration, which can still ensure participation in relevant use cases and infrastructure development activities but may not lead into long-term service provisioning after the project.

The project works on this stakeholder group in T7.4 International cloud integration.

2.1.6 Stakeholder group: HPC providers

One of the action lines of the project is the development and provisioning of interoperability guidelines for HPC systems on how to onboard and participate in the EOSC Compute platform. T7.3 explores how HPC systems should be exposed to the EOSC portal and how users should interact with them. 4 HPC providers and 4 scientific use cases participate in this action as consortium members. While the work itself (e.g. development and promotion of the guidelines) is done by the consortium, the outcome is relevant for HPC providers outside, and exploitation of the results will need engagement with them for validating and adopting the guidelines more broadly, resulting in a compute continuum ranging from HTC through Cloud to HPC.

2.1.7 Stakeholder group: Data Space providers

A Data Space is defined in EGI-ACE as a collection of scientific data, and related data analytics/visualisation/AI applications that are offered for access on scalable compute/storage resources. From a technical perspective, the access to the data space can be subjected to conditions set by relevant data subjects and data owners. Interoperability with other data and services, both in- and outside the data space, is also possible. This group is considered one of the main target audiences of the project. The EGI-ACE project consortium in WP5 already includes 13 data spaces in different scientific domains and

implemented data space as an integrated multi-supply offer of research data, application tools and the necessary federated compute and storage infrastructure needed for hosting, processing and analysis. The project looks for additional communities who could become data space providers by bringing scientific datasets and analytics applications to the generic compute-platform-access layers of the project.

2.1.8 Stakeholder group: EOSC Association

The EOSC Association is an important stakeholder for the EGI-ACE project as it represents the EOSC stakeholders towards the European Commission in the context of the EOSC Co-Programmed Partnership. It is important that they are made aware of the results of the project and the contribution in implementing the EOSC SRIA.

2.1.9 Stakeholder group: EOSC Advisory Groups (AGs) & Task Forces (TFs)

The new EOSC governance will engage the stakeholders in developing recommendations in different areas based on a number of advisory groups and task forces that are being formed. Draft charters are made available¹³ and there is an open application process. Once the groups are formed and active, it will be important for the EGI-ACE project to define engagement strategies with those groups, to make sure that relevant results from the project are fed into them and vice versa.

2.1.10 Stakeholder group: Providers of EOSC Core

EGI-ACE offers services in EOSC and therefore acts as a user of the EOSC Core. Besides using the core services through their user interfaces (GUI/APIs) the project also engages with the core providers about feedback, development suggestions. One-to-one channels are already established to several core services (Marketplace, Accounting, AAI) where such feedback is being reported.

Note that several elements of the Core are also included in EGI-ACE Task 7.6 ‘Service Management Tools’: Accounting, Monitoring, Helpdesk, AAI, Configuration DB, Operations Portal. The scope of work is complementary for these services in the two projects: Their focus in the EOSC Core is to serve the whole EOSC community, the focus in EGI-ACE is to use and improve them for serving computational services and use cases. The funding lines are separated accordingly (in the EOSC Future for the Core developments, in EGI-ACE for the compute-specific developments).

¹³ <https://www.eosc.eu/news/draft-charters-eosc-association-task-forces-published>

2.1.11 Stakeholder group: EOSC Future project and INFRAEOSC-07 projects

EGI-ACE will work in close collaboration with EOSC Future and other 07 projects on activities of common interest across all of them. The joint activities are expected to include:

- Coordinated service resource provisioning;
- Architecture & Technical Interoperability;
- Requirements Gathering & Analysis (about core services);
- Aligned user engagement and communication;
- Integrated training.

At the time of writing (July 2021) the collaboration agreement with all these projects is under preparation. Full, signed agreements are expected in October 2021.

2.1.12 Stakeholder group: GAIA-X

There are strong synergies between EOSC and GAIA-X, both seeking to seamlessly integrate data and services across a range of sectors and research domains. The project is actively engaging with GAIA-X, through a combination of EGI Foundation staff participating in GAIA-X Working Groups and Open Work Packages and project partner representatives also participating in Open Work Packages. EGI-ACE representatives recently published a paper about the compared Governance, Architectures and Business Models for Data and Cloud Federations in EOSC and GAIA-X¹⁴. The paper was sent to, and is already used by, the EOSC Association in alignment meetings with GAIA-X.

2.1.13 Stakeholder group: EOSC-like initiatives outside Europe (GOSC)

The Global Open Science Cloud (GOSC) represents an opportunity to extend the geographic scope of EOSC beyond Europe across the globe. Efforts related to GOSC are early stage and diffuse, spanning UNESCO and CODATA to the Research Data Alliance to a variety of regional initiatives around the world such as the Malaysia Science Platform and the Africa Open Science Platform. It is important for the project to track and support these efforts and share knowledge in order to build collaborative peer-to-peer relations that will create a common ground for understanding as well as compatible and interoperable approaches that will allow EOSC to interwork with GOSC participants worldwide. EGI engaged with GOSC before EGI-ACE and organised a GOSC workshop as part of the EGI Conference 2020 event. The project continues to engage with GOSC efforts, particularly those with a focus on federating infrastructure, in order to create a community of practice upon which future cooperation can build. One of the next steps is contributing to the GOSC workshop 2021 event.

¹⁴ Mark Dietrich, Tiziana Ferrari: Governance, Architectures and Business Models for Data and Cloud Federations: the EOSC and GAIA-X Case Studies. Available at https://zenodo.org/record/5081865#.YO6R_-gzY2w

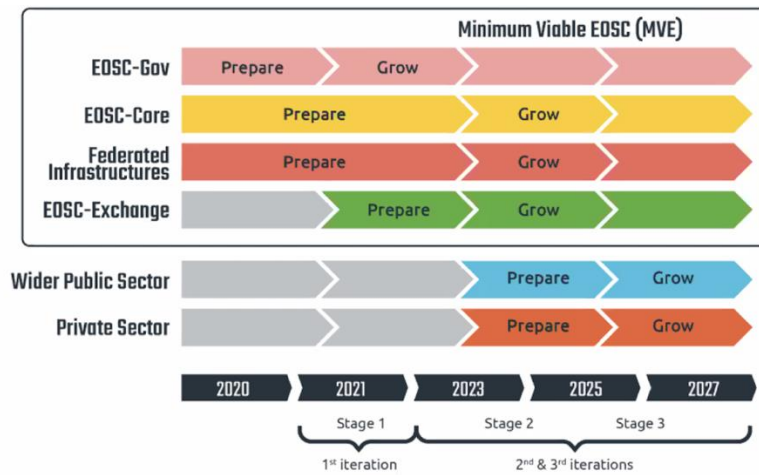


Figure 1: Timeline of EOSC iterations towards a Minimum Viable EOSC (MVE)

2.2 Engagement activities

The following table provides an overview of the engagement activities that the project will perform, and the linkage/relevance of those to the different stakeholder groups. The various activities are then detailed one-by-one. These activities are supported by the communication activities, which are described in further detail in the communications section of this report.

Engagement instrument		Users					Service and content providers			EOSC Governance and Core			Peer initiatives			
Name	Priority	Research ers (long-tail of science)	Internatio nal projects	RIs	Industry/ SMEs	Public sector	Cloud, HTC	HPC	Data space provid ers	EOSC Associati on	EOSC AGs/TFs	Provid ers of EOSC Core	07 projects	GAIA-X	GOSC	EOSC- Future
		Low	Medium	High	Low	Low	High	Medium	High	High	High	High	Medium	Medium	Medium	High
Webinars	High	May respond/att end	Targeting them	May respon d	May respond/att end		Relevant content is provided									
Training (live and self- training)	Mediu m						Relevant content is (should be) provided									
Call for use cases	High		Primary instrument	May respon d		May respond										
Direct (one- on-one interactions)	High	---		Primar y way			OMB (existing) 1-on-1 meetings&work shops	Via WP7 partners+Eur oCC Later: EuroHPC	Interacti on w. BDVA	EGI.eu is member (rep is WP2 coord)	EGI-ACE representat ives involved	Primary instrume nt	Regular 07 coord meetings	Participatio n in their TFs	GOSC workshops	Regular coord. meetings
How others did it (use case examples)	Mediu m	Usage examples (on the website)					Provider experiences (how NGI x benefits from EGI)									

Publications (incl. Newsletters)	Medium	Informing about project results, updates and upcoming activities and events (more detailed in communications section)													
EGI conferences	High	Informing about project results, updates and upcoming activities and events. Additionally offering all audiences to interact, share knowledge and discuss relevant topics.													
Topical workshops	Medium			Important instrument											
Demos/talks/ ... @ external events	High														

Table 2: High level overview of planned engagement activities and prioritised stakeholder

3 Implementing stakeholder engagement

The engagement with scientific communities and researchers is one of the key activities pursued by the project to consolidate the outreach network of existing communities and reach out potential new researchers.

In Section 3.1 the main stakeholders of the engagement strategy are represented by International Projects and Research Infrastructures (RIs) belonging to the User target group reported in table 2, while in section 3.2 we will focus on the strategy for targeting services and content providers.

3.1 Engagement with the Users

EGI-ACE already includes **13** Data Spaces addressing the following disciplines: Health and Medicine (4); Climate Research (2); Energy and Physical Sciences (2); Environmental Sciences (4); and Social Sciences and Humanities (1). The project will also support additional **7** international Early Adopters scientific communities to expand the initial capabilities offered by the project and will run an engagement programme to reach even more scientific communities and users.

3.1.1 Methodology

To expand the users base in EGI-ACE, the following activities will be pursued:

- Perform a gap analysis to understand the current customer landscape.
- Identify emerging areas and underrepresented disciplines.
- Organize marketing and targeted activities to reach the new stakeholders.
- Provide technical support on computational and compute-related data management activities, propose advanced solutions and provision resources for supporting the integration plans
- Organize sound training plans to address the needs of the different stakeholders.
- Record engagement opportunities. Analysis of the current (customers) landscape.

The starting point for improving the strategy for reaching out potential new stakeholders is to analyse the current customers landscape, identify potential gaps represented by underrepresented disciplines, and define a targeted plan for helping new stakeholders to enter the engagement process.

To have a full understanding of the current landscape we have considered all the customers supported by EGI before the start of the project. Currently EGI is supporting 75K users from different scientific areas. The largest scientific communities in EGI are Medical and Health

Sciences, High Energy Physics, and Earth and Environmental Sciences, together representing more than 75% of the total user base. Some of these communities are now supported as EGI-ACE Data Space providers or Early Adopters.

3.1.2 Analysis of the current (customers) landscape

The starting point for improving the strategy for reaching out potential new stakeholders is to analyse the current customers landscape, identify potential gaps represented by underrepresented disciplines, and define a targeted plan for helping new stakeholders to enter the engagement process.

To have a full understanding of the current landscape we have considered all the customers supported by EGI before the start of the project. Currently EGI is supporting 75K users from different scientific areas. The largest scientific communities in EGI are Medical and Health Sciences, High Energy Physics, and Earth and Environmental Sciences, together representing more than 75% of the total user base. Some of these communities are now supported as EGI-ACE Data Space providers or Early Adopters.

3.1.3 Prioritization

- **Strategic communities:** Communities with the biggest growth potential in terms of user base, service consumption, and funding.
- **Biggest communities:** Communities already using the resources and the solutions offered by EGI but without a formal SLA/MoU.
- **Strategically important growing communities:** Communities already using EGI resources with a formal SLA/MoU that are interested to use EGI any further.
- **Experimental communities:** Communities with uncertain growth potential and with commitment to use EGI resources currently limited to projects.
- **Other:** Small group of researchers with limited scope, short timeline, and low or uncertain impact at European scale.

The adoption of this prioritization produced the following results:

- **Strategic communities:** BELLE II, DARIAH, ELIXIR, EMSO-ERIC, Joint Research Centre (JRC), METROFood, and OBSEA.
- **Biggest communities:** CLARIN, D4Science, IceCube, KM3NET, LifeWatch, LSGC, NBIs, VIRGO and WeNMR.
- **Strategically important growing communities:** CNIC/CAS, EISCAT-3D, ELI/ELI-NP, European Marine Board (EMB), Fusion, GEO-DAB, and OPERAS,
- **Experimental communities:** C-SCALE, PolicyCLOUD, DIGITbrain, EUHubs4Data, EOSC Synergy, DANUBIUS, and PaNOSC.
- **Other:** Several piloting activities coming from Early Adopters programme and long-tail of science users.

The results of the gap analysis are reported in the next section.

3.1.4 Underrepresented communities/domains

A clear evidence of the results of this landscape analysis is lack of key areas/communities. To bridge this gap, potential new stakeholders, from new emerging areas, will be selected based on the Horizon Europe (HE) and Digital Europe Work Programmes. The main objective of the Horizon Europe Programme is to tackle climate change and boost the EU's competitiveness and growth. More specifically, the HE Programme is organized in 3 Pillars:

- Pillar I: Excellent Science,
- Pillar II: Global Challenges and European Industrial Competitiveness, and
- Pillar III: Innovative Europe.

The EGI Engagement programme will focus more on the Clusters supported by the Pillar II of the HE Programme:

- Health,
- Culture, Creativity and Inclusive Society,
- Civil Security for Society,
- Digital, Industry and Space,
- Climate, Energy and Mobility, and
- Food, Bioeconomy, Natural Resources, Agriculture and Environment.

From the HE Work Programme, the following top priority have been identified:

Scientific Domain	Main players	Actions
Earth Observation (EO)	ESA	Find personal contact
	Joint Research Centre (JRC)	We already started a collaboration in EOSC-hub. Continuing the collaboration started with Joint Research Centre (JRC) providing pledged computing capacities to build out functionalities that are relevant for the user community. This activity will be jointly supported in the context of the EGI-ACE and C-SCALE projects.
	C-SCALE	We already signed a MoU
Health and Medicine	BBMRI	Keep engaging
	ELIXIR	We already started a collaboration in EOSC-hub. Activity took new direction (DataHub)

Agricultural	Food Nutrition Security Cloud (FSN-Cloud)	Engaging with this community to further develop the Food Security Platform and leverage on the EGI cloud-based infrastructure to better support applications exploiting Copernicus Sentinel-1 and Sentinel-2 datasets
	MetroFood (ESFRI)	Initial contacts were established.

Table 3: Top priority scientific communities that will be engaged

3.1.5 Action plan to reach/engage with emerging communities

A detailed strategy and action plan for reaching out to the top priority communities reported in Table 3. will be described in the EGI Engagement Plan (which will be a public document in the EGI documents repository).

3.1.6 Consultancy and co-design activities

To support the integration of new scientific use cases, services and content providers in the European Open Science Cloud Compute Platform, dedicated co-design activities (e.g.: workshops, and bootcamps) will be organized by the project.

More specifically, this activity will support:

- Compute providers to become interoperable and mature providers in the EOSC Compute Platform.
- Scientific users who wish to use EGI-ACE services in EOSC.
- Scientific communities and RIs who want to establish their data spaces on top of the EGI-ACE infrastructure.
- On-boarding new services in EOSC.

3.1.7 Open calls

Additional user communities will be identified and supported via different channels during the project. The list of relevant channels includes:

- The EGI-ACE open calls to promote the project services for adoption, consolidate the outreach network of existing research communities, and reach out for potential new customers and users of the EGI-ACE services. With these open calls, the project will offer access to infrastructure and platform services, dedicated user support and training. The services, support and training offered by the project are sponsored by the

European Commission and various national funding agencies and are freely accessible for the use cases that will be selected through the call.

- The cross-project collaboration plan between EOSC Future and the INFRAEOSC-07 projects.
- Scientific use cases supported in collaboration with national research infrastructures, ESFRI data clusters, collaborating projects in INFRAEOSC-07.
- Promotion through the EGI Federation links with national and international user communities.
- Promotion through non-European international collaborations.

3.1.8 **Technical Support**

The technical support to expand the users base in EGI-ACE is mainly provided in T2.3. The main purpose of the user engagement activities in T2.3 is therefore twofold:

1. Support the Data Spaces and the Early Adopters in the uptake of the EGI-ACE core services (infrastructure + platform) and support them in reaching scientific end users with the software as a service products.
2. Reach new user communities that are underrepresented or not present in the current user landscape but have high potential for the exploitation of EGI-ACE services.

We achieve this second objective by analysing the existing user base and the broader landscape of compute-intensive research. The analysis of the current customers landscape was already documented in the previous section.

3.1.9 **Training events and Webinar Programme**

To promote the knowledge sharing and facilitate the EGI-ACE project services adoption the project will organize webinars, and when possible, also face-to-face training events. By the time of writing of this report, the first part of the EGI Webinar programme started in April 2021 focused more on the advanced solutions for targeting the needs of international projects and researchers. During the second part, the programme will also include additional topics to target the needs of service and content providers (e.g.: on-boarding of new novel services in EOSC).

To guarantee a deeper impact of the knowledge sharing process, the training activities will be further developed in tandem with the EOSC Future and the INFRAEOSC-07 projects. In the coming months a realistic Collaboration Agreement (CA) with these projects will be set-up to describe the joint activities of common interest that will be carried out as part of these collaborations.

3.1.10 Learning Management System (LMS)

Overall, the Learning Management System is a platform for helping educational institutions and organizations to create and organize learning materials in one place and track the progress of their trainees or students.

To facilitate the engagement with participants in courses, provide unlimited access to e-learning materials, track attendance to courses, send online tests, and give tailored educational material based on their skill profile, the project will set-up a Learning Management System. This platform will host training materials and courses from the EGI communities, and it will be used for both virtual and physical delivery of training events.

3.1.11 Participation to conferences

A proactive way to reach out potential new scientific communities and international projects is to participate in their annual conference meetings or invite them to contribute to the annual event organized by the project.

3.1.12 Tracking of new Users

All the users entering the engagement process will be recorded in the EGI Confluence space.

3.2 Engaging with service and content providers

To deliver and operate the European Open Science Cloud Compute Platform for serving the present and future needs of data-centric, research-focused computing in Europe, expand the supply-side, and promote the development of an open, data-centric, distributed, hybrid and secure infrastructure, the project will foresee several engagement opportunities.

In the next sections we will describe the activities that will be carried out to engage with the Service and the Content Providers.

3.2.1 Service Providers

To expand the compute service providers base in EGI-ACE, the following activities will be pursued:

- Finalise integration of the MoU-based cloud providers into the EOSC Compute platform (Georgia, Moldova, Latvia, T-Systems, CloudFerro, CNIC).

- Negotiate integration with emerging national e-infrastructure consortia: Lithuania, Austria, Ireland, Taiwan.
- Discuss alignment (technical) and technology/experience exchange with peer-infrastructures outside Europe: TRIUMF (Canada), ARDC (Australia), NDRIO (Canada), C-DAC (India), CLAF (Latin America), CSIR MERAKA (South Africa).
- Reach out to new countries where national infrastructure may exist: Belorussia, Israel.
- After the HPC integration activity brings its first results, reach out to HPC sites/projects that are external to the EGI-ACE consortium to inform them about the results, to validate those, to facilitate uptake for sharing HPC systems in EOSC.
- Prepare integration handbooks for service providers. The goal of these handbooks is to describe the various options for technical integration for new providers contributing to the EOSC compute platform delivered by EGI-ACE.

3.2.2 Content Providers

To expand the content providers base (Data Spaces) in EGI-ACE, the following activities will be pursued:

- Promote the EGI-ACE call to scientific communities that are providing scientific data but assumed to lack infrastructure for data exploitation.
- Continue the engagement with Big Data Value Association (BDVA). Monitoring the work done in the context of the BDVA TF10 - Data Sharing Spaces which focuses on supporting the realisation of the potential of European Data Sharing Spaces.
- Monitor the Horizon Europe / Digital Europe work programmes to find relevant calls in this topic and prepare a consortium with content providers.

3.2.3 Tracking of Service and Content Providers opportunities

The engagement opportunities for supporting new service and content providers is tracked in the EGI Confluence space and Jira.

4 Communications

Communication activities within the EGI-ACE project will support the outreach and visibility of the project. This section of the deliverable describes the initial plan, focusing on the most appropriate content for the relevant target audiences. Communication activities will create content and disseminate this through the relevant channels, whereas the engagement activities will focus more on creating interactions, offering room for initial exploitation of the project results, which has been described in the previous section of this plan. In the context of EGI-ACE, lessons learned from previous relevant projects (e.g., EOSC-hub), and established relationships with other projects and infrastructures, serve as valuable input.

4.1 Dissemination and engagement support

The earlier phase of the project will mainly focus on digital dissemination and engagement activities. As the global pandemic will not allow for face-to-face events yet, online webinars and meetings will be the main tools to ensure all target audiences and stakeholders stay up to date on the latest developments of the project. EGI-ACE related topics will be part of the EGI webinar series, which are planned periodically.

A more detailed dissemination plan will be embedded in D1.4 Dissemination and Exploitation plan, which will also include IP management, exploitation paths, and adoption. In this deliverable, an overview of the dissemination activities will be mentioned in support of the communication plans.

Online communication channels will play an important role in the dissemination of the project. Platforms such as social media, newsletters, and websites will be populated with case studies, call for proposals, news items, explanatory videos and infographics. The project outcomes and results will additionally benefit from scientific journals, online events/webinars and training sessions, depending on the audience.

An initial sketch of the dissemination activities, in support of communication, for each stakeholder category is displayed below. The table includes examples, objectives and appropriate indicators to measure the impact.

Target audience 1 - stakeholder category: users

<i>Communication activity</i>	<i>Objective(s)</i>	<i>Dissemination output(s) and example(s)</i>	<i>Impact indicators</i>

Promote call for use cases	Inform users about the offering and how it supports their activities. This includes informing about the application process.	<ul style="list-style-type: none"> • Dedicated webpage on the call • Newsletter items • Social media posts • Targeted emails to relevant mailing lists • Posts on the EOSC Liaison Platform • Add to the EOSC Portal • Include/mention in relevant events, webinars, training sessions 	# of applicants gained through the dissemination outputs
Write use cases/success stories to illustrate the service uptake	Create awareness of the impact of the EGI-ACE services.	<ul style="list-style-type: none"> • Populate use cases section on website • Newsletter items • Social media posts • Add to relevant scientific journals • Presentations during relevant events 	<ul style="list-style-type: none"> • Engagement statistics on online platforms • # times use case(s) used in presentations during relevant events • # of scientific journals use case(s) are included
Promote webinars, training sessions and other events	Inform and invite users to informative and interactive knowledge sharing events.	<ul style="list-style-type: none"> • Highlighted webpage on EGI-ACE events • Newsletter items • Social media posts • Targeted emails to relevant mailing lists 	<ul style="list-style-type: none"> • Engagement statistics on online platforms • Click-through statistics to registration forms on online platforms • # of participants finding out about the event via the used channels (newsletter, social media, email, webpage)

Publish specific impact reports of Data Spaces	Inform, create awareness, share impact of EGI-ACE for the Data Spaces	<ul style="list-style-type: none"> • Brochure/leaflet on the project's impact for each Data Space available online and for print • Social media posts • Targeted emails to relevant mailing lists 	<ul style="list-style-type: none"> • # of clicks and downloads • # printed versions collected during events
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Target audience 2 - stakeholder category: service and content providers for research

Communication activity	Objective(s)	Dissemination output(s) and example(s)	Impact indicators
Create guidelines on how to join the EOSC Compute Platform	Get information across on how to join the EOSC Compute Platform	<ul style="list-style-type: none"> • Infographic style quick guide available online and for print • Targeted emails to relevant mailing lists 	<ul style="list-style-type: none"> • # of clicks and downloads • # of printed versions collected during events • interactions after targeted emails sent
Demonstrate (HPC) integration in EOSC	Show the impact of EGI-ACE as means of integration in EOSC	<ul style="list-style-type: none"> • Use cases available online • Newsletter item • Targeted emails to relevant mailing lists 	<ul style="list-style-type: none"> • # of page visits and other relevant page statistics • requests to partner with the project or use guidelines

Target audience 3 - stakeholder category: EOSC Governance and Core

Communication activity	Objective(s)	Dissemination output(s) and example(s)	Impact indicators
Vocalise and visualise the project's contributions to EOSC in various	Show the impact and importance of EGI-ACE to EOSC and the association	<ul style="list-style-type: none"> • Use cases available online • Data Spaces impact reports available online and offline 	<ul style="list-style-type: none"> • Page statistics • # of printed versions collected

communication materials		<ul style="list-style-type: none"> • Social media posts directly targeting the EOSC Association • Presentations during relevant events • Posts on EOSC Liaison platform • Posts on the Horizon Results platform 	<ul style="list-style-type: none"> • Social media engagement statistics • Engagement after presentations
Inform relevant EOSC task forces about activities, results, engagement possibilities	Proposing synergies and collaborations between the relevant EOSC task forces	<ul style="list-style-type: none"> • Targeted emails to specific mailing lists • Posts on EOSC Liaison platform 	<ul style="list-style-type: none"> • # of joint presentations or booth attendances • # engagement activities leading to collaborative activities
Interact with providers of EOSC Core	Contribute to development and improvement process of EOSC Core services	<ul style="list-style-type: none"> • Direct communication 	Implementation of feedback

Target audience 4 - stakeholder category: peer initiatives

Communication activity	Objective(s)	Dissemination output(s) and example(s)	Impact indicators
Reach out to INFRA-EOSC07 projects and EOSC Future	Keep projects informed and engaged to cross-promote relevant content	<ul style="list-style-type: none"> • All relevant communication/dissemination material that showcase results, calls, highlighted activities 	<ul style="list-style-type: none"> • # materials/posts shared via communication channels of projects • # responses to relevant communication material
Continuously communicate and engage with initiatives	Contribute to and from similar approaches	<ul style="list-style-type: none"> • Direct communication • Presentations at relevant events 	<ul style="list-style-type: none"> • # meetings and/or joint activities organised to

such as GAIA-X and GOSC to share and align approaches and lessons learned	to Open Science		exchange and align approaches
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4.2 Brand development and internal communications

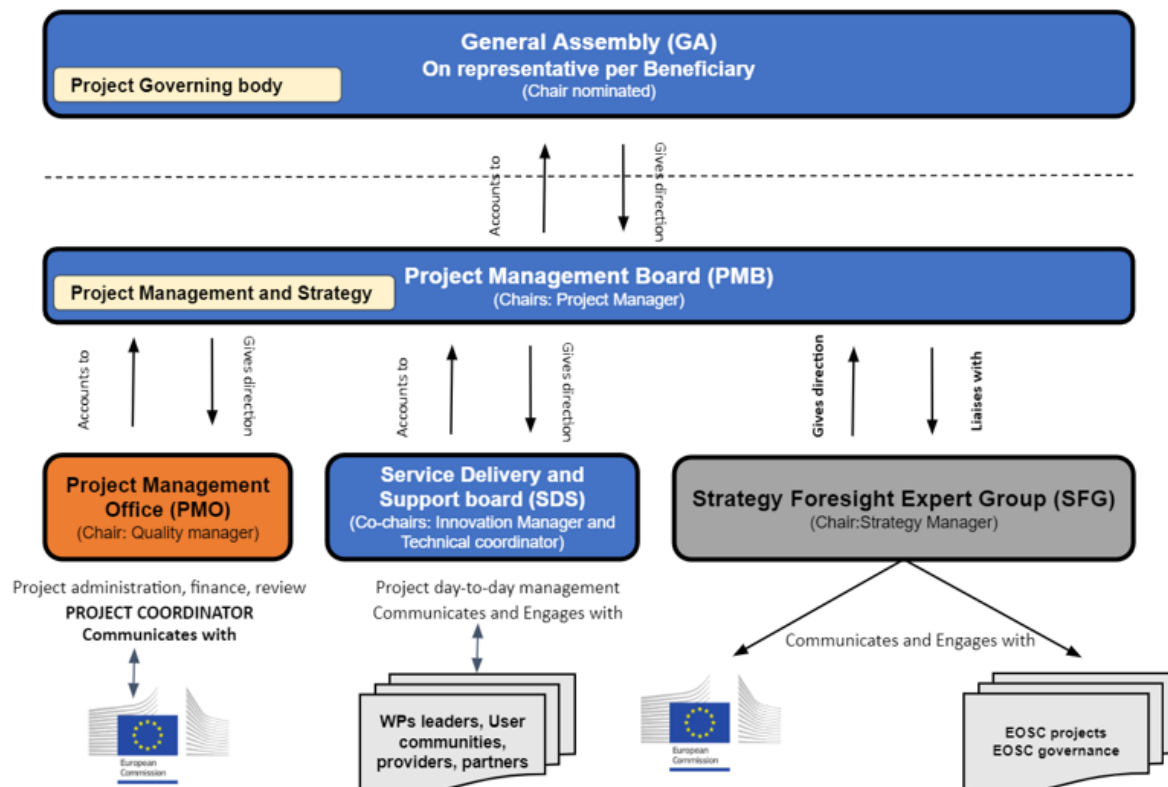
To ensure project visibility, we have focused on creating a branding guideline and populating the project 'Communication Toolkit'. Next to the logo, colour scheme, and presentation/document templates, we have included an infographic and video which both can be used for explanatory purposes during presentations or events, as well as project promotional material such as social media banners. The toolkit will be further expanded as the project progresses, especially once physical events can take place and more offline, printed, materials will be required (e.g., project leaflets and posters). All produced materials have been shared with the consortium members and are widely available to the public via the project website.

The project has established several communication channels, which will be described in more detail in the following subsection. In terms of internal communication, the project started with an internal project kick-off meeting where each project member and, subsequently, work package leader, were offered the opportunity to familiarise themselves with the project, its objectives, main activities and the relevant colleagues. Each work package leader then started to have their specific meetings and their own reporting space on the project Confluence page¹⁵.

Each governance body of the project also has its own internal communication activities. The image below presents an overview of the project governance and the main interactions with the relevant bodies. The chairs are responsible for organising regular meetings to ensure transparency and provide opportunities for the members to share important updates.

The Project Management Office (PMO), Service Delivery and Support Board (SDS), and Strategy Foresight Expert Group (SFG) are considered fundamental in terms of internal communication as they serve as the intermediaries between the management- and operational side of the project. Additionally, these three bodies have the shortest communication lines with the European Commission.

¹⁵ <https://confluence.egi.eu/display/EGIACE/>



4.3 EGI-ACE communication channels

The communication task will focus on creating and maintaining the appropriate communication channels, in order to support the enhancement of promotion and dissemination, but also to ensure these channels can serve as the main sources of information for audiences seeking for more information on the project and its outputs. This section of the report will provide an overview of the channels, their purposes and objectives.

4.3.1 EOSC Portal

The EOSC Portal serves as one of the most suitable platforms to inform the stakeholders about the services the project offers. The tool is a gateway to information and resources in EOSC and therefore widely used as a reliable source of information, funding opportunities, developments, news, events, relevant policies and important documents for any EOSC related audience. The Portal catalogue and the EOSC Marketplace act as the entry point for resources to researchers, which shows the importance of the platform for the EGI-ACE project in terms of promoting and offering the services and data spaces.

4.3.2 EGI-ACE website

As the decision has been made to align the project's branding with that of EGI, there did not seem to be a need to have a separate project website. Both EGI and the EGI-ACE project provide relevant information, which has been the main argument to keep all content on the same website. The EGI-ACE website has a dedicated menu (and sub-items) for audiences to easily navigate to the specific project content.



The landing page¹⁶ contains an overview of the project, including a short video and infographic which both visualise the project in a nutshell. On the right side there is a list of quick links that can support the page visitor to immediately jump to key content.

EGI-ACE's project webpages serve as a repository useful for researchers, policy makers, the project consortium, service providers, and the general public. Additionally, the objectives of this communication channel are:

- Provide visibility of the project's outputs, highlights and results;
- Display the project's structure including information on governance, work packages and an overview of the consortium;
- Highlight the latest news items, newsletter articles and events;
- Promote the call for use cases and provide full submission guidelines;
- Present deliverables and milestones that are accessible to the public.

¹⁶ <https://www.egi.eu/projects/egi-ace/>

With this in mind, next to the project landing page, six sub-pages have been created: news, call for use cases, consortium, key exploitable results, work packages, and governance. More will be added as the project evolves.

4.3.3 Newsfeed and newsletter

The dedicated newsfeed¹⁷ serves as the home for any project related news. This page will be fed frequently by the communications task, with contributions from the consortium. The purpose of this activity is to provide external audiences with the latest information, highlights, and updates from the project or from relevant stakeholders. Until now we have injected the page with articles on the project launch event and the call for use cases, but this will soon be accompanied with items projecting results and more information on the project's data spaces.

Similar to the website, the decision has been made to implement EGI-ACE items to the quarterly EGI newsletter. This means that over the course of the project, there will be around 12 newsletter items about the project. These items will often present a recap of activities or a dedicated topic (e.g., call for use cases, bi-annual update).

Next to updating stakeholders and the general public the news articles will:

- invite audiences to engage with the project (e.g. respond to the call for use cases);
- remind audiences to (project) events;
- promote use cases and success stories.

4.3.4 Social media

Twitter and LinkedIn accounts of EGI are being used to further disseminate the content of the project. The use of social media is mainly targeting the general public, peer initiatives and projects, as well as researchers. The purpose is to:

- Enhance digital engagement allowing stakeholders to interact with the project on a more low-barrier and frequent basis;
- draw attention to publications, articles, use cases, open calls and drive the audience to longer types of content on the webpages;
- support other communication channels;
- promote and remind audiences about project events.

¹⁷ www.egi.eu/egi-ace-news

Twitter

- Handle: @EGI_eInfra
- Project hashtag: #EGIACE (#egiace)
- Planned activities:
- disseminate content, tagging relevant Twitter accounts (EOSC related accounts, EC accounts) which causes direct notifications to appear on these accounts
- create and use Twitter specific visual material (e.g. short videos)
- live tweets during project related events

LinkedIn

- Link to profile¹⁸
- Project hashtag: #EGIACE (#egiace)
- Planned activities:
- disseminate content, mentioning relevant accounts (similar to Twitter activity)
- create events which can be easily shared and joined on the LinkedIn platform
- invite audiences to engage with content by using the tool correctly. In comparison with Twitter, LinkedIn knows no wordcount and seems to be more attractive for online audiences to engage with

4.3.5 Direct communications

In the communication section of this report, we mentioned the types of communication activities and provide some examples of dissemination activities. The table in that section shows that there are several mailing lists that reach specific stakeholder groups. Depending on the content we will share certain information directly or to specific platforms such as the Horizon Europe platform, the EOSC Liaison Platform, and in the case of scientific publications there will be submissions made to relevant journals.

¹⁸ <https://www.linkedin.com/company/egi-foundation>

5 Events

The EGI-ACE project will organise and participate to events with the aim to:

- raise awareness of the project and its outputs;
- provide user training and support;
- invite new service providers to onboard;
- influence policy makers and research communities;
- present collaboration activities to peer initiatives and projects.

5.1 EGI-ACE events

As mentioned in the engagement section, the project started with a series of webinars. These will continue to be rolled out as the project progresses, with the hope of having physical seminars, training sessions and events as soon as possible. From previous experience within the EOSC-hub project and EGI, we have noticed that the online webinars are popular tools to use for the purpose of discussing services, which do not only show in the number of participants but also show in the number of views of published recordings.

In the first year of the project the idea is to focus on webinars/seminars, training sessions and dedicated events. This will enhance the uptake of the EGI-ACE services and allow for a flagship event in the second year of the project that can present initial results. In the first year the project will contribute to the EGI conference of 2021, which will allow for demonstrations, sessions and presentations.

The plan for the EGI-ACE flagship event is to gather both internal and external audiences to share success stories and brainstorm on future opportunities to collaborate and contribute to the development of the EOSC compute platform and data spaces. The current idea is to have this event taking place in a physical manner, over the course of several days. We must note that the event landscape has changed since the pandemic and with many 'new' ways of hosting events, therefore the exact format will be decided based on the latest trends.

5.2 Joint events with relevant projects

Together with EOSC Future and the INFRAEOSC-07 projects that have previously been mentioned, the project will collaborate on organising events focussing on EOSC, in support of widening the uptake of EOSC and its related resources. The events will allow for researchers to learn more about the latest developments in the landscape, policy makers to share best practices, service providers to offer their latest updates and more. Events that could allow for joint participation/organisation could be Open Science fairs, the EOSC Symposium, and EOSC related sessions during e-infrastructure conferences.

Additionally, webinars and training events will be co-organised in order to facilitate knowledge sharing opportunities for relevant services.

5.3 Participation to external events

There are numerous events where EGI-ACE will actively participate in. Each event will aim to reach the stakeholder categories mentioned in the stakeholder mapping section of this plan. The table below provides an overview of events that will be or have been attended, and the relevant activities.

Event	Date	Target audience	Activity
EGI Conference 2020	4 November 2020	Research communities, service providers, policy makers, end-users	Presentation introducing the project during the closing plenary of the conference
SZTAI Information Day	17 December 2020	IT providers	Presentation
OpenAIRE-Nexus public launch	10 March 2021	INFRA-EOSC07 projects	Presentation
IWAPP - Innovative Workflows in Astro- & Particle Physics	12 March 2021	Researchers	Presentation
EuroHPC Summit	22-26 March 2021	European HPC stakeholders from technology suppliers and HPC infrastructures to scientific and industrial HPC users in Europe	Participation to gather knowledge relevant to the project and its stakeholders
EISCAT 3D Access workshop	10 May 2021	Developers, service admins, end-users	Workshop
Virtual DIRAC Users' workshop	11 May 2021	Developers, service admins, end-users	Presentation
Pujiang Innovation Forum 2021	2 June 2021	Scientists, E-infrastructure providers, Policymakers	Presentation
EOSC Symposium 2021	15-18 June 2021	Research communities, service providers, policy	Presentation

		makers, INFRA-EOSC07 projects	
EGI Conference 2021	19-21 October 2021	Research communities, service providers, policy makers, end-users	Presentations, sessions, demonstrations
SC21 (Supercomputing)	14-19 November 2021	Research communities, service providers, policy makers, end-users	Presentations and demonstrations at booths

This table will be completed as events will be announced. A number of events repeat on an annual basis (e.g., EuroHPC Summit, EGI Conference and SC) and will be participated in by members of the project.

6 Measuring progress and success – Key performance indicators

Measuring the performance of the engagement and communication activities will be done on a quarterly basis and formally reported in relevant deliverables. The results will be of particular interest to D2.6, which is the follow-up version of the current deliverable. It is expected to be finalised one year after D2.1 which provides one year of carefully analysing the outputs of the current strategy. The following impact indicators will be measured and adjusted in case necessary:

- Number of visitors and clicks on the webpages (and other relevant web statistics)
- Number of events organised and the number of attendances
- Number of external events attended and the number of attendances for the EGI-ACE specific sessions
- Number of entries in the internal dissemination tracking overview on Confluence
- Number of joint collaborations organised/initiated
- Number of submissions call for use cases (including referral statistics)
- Social media statistics (shares, retweets, comments and more)
- Number of (communication) materials shared by other projects, peer initiatives etc.
- Number of printed materials collected by audiences during physical events

Other important metrics will be gathered by work packages 3 until 7, which will be continuously shared in the monthly Service Delivery Support team meetings and on Confluence. This information will be important for the communication and engagement tasks to gather, as it may influence the efforts. The most important metrics to monitor are:

- Number of services onboarded
- Number of papers/journals EGI-ACE is acknowledged
- Number of new users of EGI-ACE services
- Number of use cases adopted

7 Conclusions

This document presented the project's stakeholders, indicated which have a higher or lower priority in terms of engagements, and shared planned communication activities that will support the interaction with the target audiences. Also, it clearly provided impact indicators that will be able to analyse whether an objective has been achieved, which will support the reporting activities and allow to improve engagement and communication plans.

Much of the content for the plan will be collected through the call for use cases as well as the information collected from Data Spaces. Both will allow for impactful content that will be used to show examples of service deployments, potentially attracting providers as well as users to engage more with the project. Not only will dedicated impact reports be of great value to promote the project, but also regular news items/newsletter content, and (online) dissemination activities will increase the awareness of the project and its impact.

In addition to engaging and communicating broadly with and about EGI-ACE, there is a great number of webinars, training sessions and events organised (and attended) to allow stakeholders to obtain and share knowledge, which supports the development of the EOSC Compute platform, collaborations, and service uptake, all leading to a better understanding of the value of Open Science. A list of key events is listed and will be updated in the project's Confluence page.

As a summary, this initial plan has a clear strategy on targeting new and existing audiences, keeping them engaged in a sustainable fashion over the course of the project and thereafter. The communications and engagement plans will be updated regularly as all activities will be monitored, keeping in mind the KPIs and objectives set for each of them. As mentioned before, the project builds on previous experiences and lessons learned from projects as EOSC-hub and will benefit from collaborative efforts with relevant projects. This all will contribute to the improvement of the communication and engagement plan.