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Deliverable D7.1:

Communication and Dissemination Plan

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Abstract

This document outlines a comprehensive communication and dissemination plan for the AARC TREE project. It defines objectives, identifies target audiences, and details strategies for maximizing project impact through various channels. Key elements include stakeholder engagement, social media utilisation, and performance measurement. The plan aims to effectively communicate project achievements.

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Acronym	Definition
AAI	Authentication and Authorisation Infrastructure
AARC	Authentication and Authorisation for Research and Collaboration
AEGIS	AARC Engagement Group for Infrastructures
RIs	Research Infrastructures
BPA	Blueprint Architecture
EOSC	European Open Science Cloud
AARC PMB	AARC Project Management Board
PDK	Policy Development Kit

Executive Summary

This Communication and Dissemination (D7.1) Plan outlines a comprehensive strategy to maximize the impact of the AARC TREE project. The document details the specific communication and dissemination activities for project stakeholders, both during and post-project completion.

Key elements of the plan include:

- A clear definition of communication and dissemination objectives aligned with the project's primary expected results.
- An analysis of target stakeholders to inform tailored communication strategies.
- A detailed overview of communication channels and tools, social media platforms, branding guidelines, and planned events.
- A set of success indicators to measure the effectiveness of the communication and dissemination efforts.

By executing this plan, the project aims to effectively communicate its achievements and engage with stakeholders.

1. Introduction

1.1. Purpose and Scope of the Document

In Work Package 7, Task 7.1 focuses on Communication and Dissemination and Task 7.2 on Exploitation and Innovation management activities. This deliverable outlines a comprehensive plan for T7.1, aligning it with target audiences and stakeholders, establishing a timeline where feasible, and identifying key success indicators.

The plan detailed in this deliverable aims to communicate project actions and outcomes to primary stakeholders effectively. It emphasises broad dissemination of project services to enhance accessibility and encourage their use, promoting project success. Additionally, it highlights strategies to engage stakeholders proactively.

This plan is not a rigid structure, but a dynamic and adaptive tool that will evolve with the project. It is subject to updates throughout the project lifespan, with adjustments made based on project progress. Tailored outreach initiatives and engagement approaches will be devised for each stakeholder group, considering their specific needs, work package activities, and expected levels of engagement. This adaptability ensures that we are always responsive to the changing needs of our stakeholders.

1.2. Project Overview

The main objectives of AARC TREE are to capture and analyse new Authentication and Authorisation interoperability requirements, provide a landscape analysis of the AAI services in the RIs represented in AARC TREE, define and validate new technical and policy guidelines for the AARC BPA addressing RIs use-cases; expand the number of research communities that can implement the AARC BPA and the AARC guidelines, by providing a validation environment and toolkits; bring RIs, e-Infrastructures and relevant stakeholders together to align strategies to integrate new technologies, better

interoperate and share resources across thematic areas and produce a compendium and recommendations for different stakeholders.

AARC TREE uses the AARC inclusive model to capture and analyse the AAI interoperability requirements and service gaps for more research infrastructures. It also enhances the AARC BPA to support RIs more effectively by further expanding authorisation aspects and enabling new use cases.

Project Objective	Description	Expected Result
PO1	Capture and analyse new Authentication and Authorisation interoperability requirements.	The outputs of this objective will be (i) a list of requirements that will be gathered (by WP3) at the end of Y1 to refine the work planned in Y2 for the Technical Guidance and Architecture (WP1) and Trust Policy Harmonisation and Interoperability (WP2), (ii) a landscape analysis (WP3) and (iii) the compendium with recommendations to different stakeholders delivered at the end of the project.
PO2	Define and validate new technical and policy guidelines that address RIs use-cases, and that will be enabled by the new version of the AARC BPA.	During the first year, the expected result for this objective will be a new set of (both policy and technical) guidelines. In the project's second year, the guidelines, in conjunction with the requirements analysis, will result in a new version of the AARC BPA.
PO3	Expand the number of research communities that implement the AARC BPA and AARC guidelines, and support the existing AARC communities in adopting new guidelines	New technical and policy guidelines, and new version of the Policy Development Kit (PDK) and a validation suite.
PO4	Bring RIs together to align strategies and liaise with other stakeholders	New policy guidelines and Recommendations for a common long-term strategy for AAI services in pan-European Research Infrastructures in Europe, an expanded role for AEGIS

Table 1: Project objectives and expected results

1.3. Purpose and Scope of the Plan with respect to the Project Objectives

Drawing from the project proposal, this plan aims to establish a close collaboration with the project work packages to identify and categorise prospective stakeholder groups in alignment with the

expected results of the AARC TREE. Tailored outreach initiatives and engagement approaches will be outlined for each stakeholder group, considering their specific needs and expected levels of engagement.

The following sections summarise the specific Communication and Dissemination activities in the project.

1.3.1. Communication Activities

The communication activities in the project have a threefold objective:

- **Ensure an effective online presence:** all online channels, including the website and social media, should have a clear and logical information structure with straightforward navigation, allowing visitors to easily find news, updates, project details, and event information.
- **Communicate project progress and outputs:** stakeholders are informed on how to access and utilise project outputs, which are openly available, easily accessible, and can be reused as needed.
- **Build awareness:** establish a strong brand presence to ensure the maximum adoption of the final project results and outputs.

1.3.2. Dissemination Activities

Get the word out: generate awareness about AARC TREE and its findings through a multi-channel approach (including website, social media, document repositories, and event presence). Enhance the dissemination of project information by fostering partnerships with relevant international organisations and networks to broaden the project's reach. Use RIs and partner organisation communication channels to maximise the dissemination effort.

- **Engage Stakeholders:** tailor dissemination efforts to maximise the input and collaboration opportunities for the various stakeholders, focusing on output adoption.
- **Uptake & Implementation:** disseminate project information strategically to ensure widespread use of AARC's guidelines and compendium by critical stakeholders and beyond.

1.3.3. Engagement Activities

- **Leverage the existing community:** harness the existing AEGIS community to pinpoint early adopters for the new AARC TREE guidelines.
- **Build collaborative partnerships:** establish strategic connections within the AAI ecosystem.
- **Promote active participation:** facilitate stakeholder engagement through webinar organisation and event participation to foster capacity building and knowledge exchange.

2. Project Stakeholders

In the proposal phase, leveraging the previous AARC Projects that helped set the scene, we identified the most appropriate stakeholders for AARC TREE. The project divides the stakeholders into three different groups, each of them following a different level of engagement:

- Consultation: the project actively seeks the opinions of interested and affected stakeholders. It is a two-way flow of information, which may occur at any stage of the project development, consisting of a one-stage process or a continued dialogue.
- Implementation: these stakeholders uptake and implement the project outputs
- Notification: the project informs the stakeholders so they are aware of the project. This activity can lead to engagement but can also remain limited to telling about the project as future users of project outcomes (directly or indirectly)

Each interaction form comes with several levels of engagement:

- High: active engagement of all identified stakeholders in all project stages (including post-project follow-up) is required to ensure the project's success.
- Medium: active engagement in some project stages (including post-project follow-up) is desirable.
- Low: engagement is mainly expected to occur in the project's late stages.

Stakeholder Group	Description	Engagement Type	Engagement Level
Research Infrastructures and e-infrastructures	National and international facilities that provide resources and services for research communities to conduct research and foster innovation, like the ERIC Forum, ESFRIs, and others. This stakeholder group includes AEGIS and its member organisations.	Consultation	High
Research Communities	Including scientific communities, collaborations, individual researchers, and whoever uses RI facilities to some extent	Notification	Low
EU and global initiatives	Such as the International Data Spaces Association (IDSA), GAIA-X, EU eID wallets, the Federated Identity Management for Research (FIM4R) group, etc., that will help AARC TREE understand the requirements of the industry	Consultation	High

Stakeholder Group	Description	Engagement Type	Engagement Level
	sector. REFEDS is also present in this group.		
Service and resource providers	Both existing and prospective AAI providers, plus all providers interested in offering their services and resources to researchers, including project partners, who will be affected by the novelties introduced by AARC TREE	Implementation	Medium
The EOSC Ecosystem	Such as the EOSC EU Node initiative, the EOSC Association Task Forces and other EOSC projects etc., which could uptake the project results	Implementation	Medium

Table 2: AARC TREE Stakeholders

2.1. Stakeholder Management and Engagement Activities

Building upon the five stakeholder groups identified in the previous section, the project will engage stakeholders more granularly. Project partners will collaborate to determine the specific engagement methods for each stakeholder group within a WP, with support from WP7. This ensures a flexible and targeted approach that considers the unique needs of each endeavour.

Thanks to the previous AARC projects, the stakeholders are aware of AARC TREE overall. We will devote specific effort to:

- Promote the AARC project output among interest groups and members;
- Gather community input to feed the different project outcomes (e.g. BPA, guidelines, etc.);
- Organise joint dissemination activities and workshops;
- Share AARC TREE outcomes;
- Discuss about cross-project organisation best practices.

The engagement activities will mainly happen through direct contact with their key members, at internal and external meetings, at events, or by providing direct input to the AARC TREE Project.

3. Communication and Dissemination Plan

To support the dissemination of the project results, this part specifies an initial set of strategic and targeted activities and tools to inform the project target groups about the project activities and findings. These activities will be regularly monitored and reviewed with the help of the project

partners to assess the quality of the message, appropriateness of the channels, and visibility amongst the target groups that are foreseen. AARC TREE relies on the ambassadorship of the partners, who are experts in the field of AAI.

Initial Resources (M7-12):

- Project Website¹: this is the central hub for project information, user stories, and access to results. NB. It was established in 2015, during the first AARC project; WP6 revamped it during M1-6.
- Social media channels (all created during the previous AARC projects):
 - LinkedIn account²: regularly updated channels to promote project updates and engage audiences.
 - The project also has an X account³; discussions are ongoing about whether to maintain that channel or dismiss it.
 - Facebook account⁴: despite the good number of followers, there might be other suitable channels for engaging with stakeholders.
 - YouTube: a playlist for AARC is available on the GEANT TV YouTube channel⁵.
- Branding Guide: this guide explains how to use the resources in the Branding kit correctly to ensure consistency. It is available to project partners; WP6 detailed it in *M6.1 "Guidelines for online presence"*.
- Communication Toolkit on Confluence (available to project partners): this collection of resources guides project partners in effective communication strategies.
- Dissemination activity tracking (on Confluence): it allows for monitoring all dissemination activities.
- Database with information from the AARC TREE partners: the contact list of the communications managers and links to the website and social media (to be created in M8).

3.1. Communications Tools

3.1.1. Project Branding

The project logo was developed with the first AARC project, while WP6 further refined the AARC TREE visual identity and branding.

Milestone 6.1, "*Guidelines for the online presence*", details instructions for the online presence for AARC TREE, AARC Community, and AEGIS. Moreover, it specifies the AARC visual identity. In WP6, a set of icons has been developed and distributed to partners. It facilitates a consistent representation of the project and its outcomes on all channels.

3.1.2. Designs

WP7 will provide basic designs for a flyer, poster, moo card, and roll-up - all in editable formats. In agreement with the partners and in alignment with the specific purpose of the design, changes and edits can be made to the designs available in the toolkit. Still, partners could edit and reuse the designs themselves as they are all available in an editable format. Additionally, WP7 will create

¹ <https://aarc-community.org/>

² <https://www.linkedin.com/company/aarc-community/>

³ https://twitter.com/AARC_Project

⁴ <https://www.facebook.com/AARCproject>

⁵ https://go.egi.eu/AARC_YouTube

infographics to illustrate project workflows and processes best. The materials will be available on Confluence.



Figure 1: Project Postcard

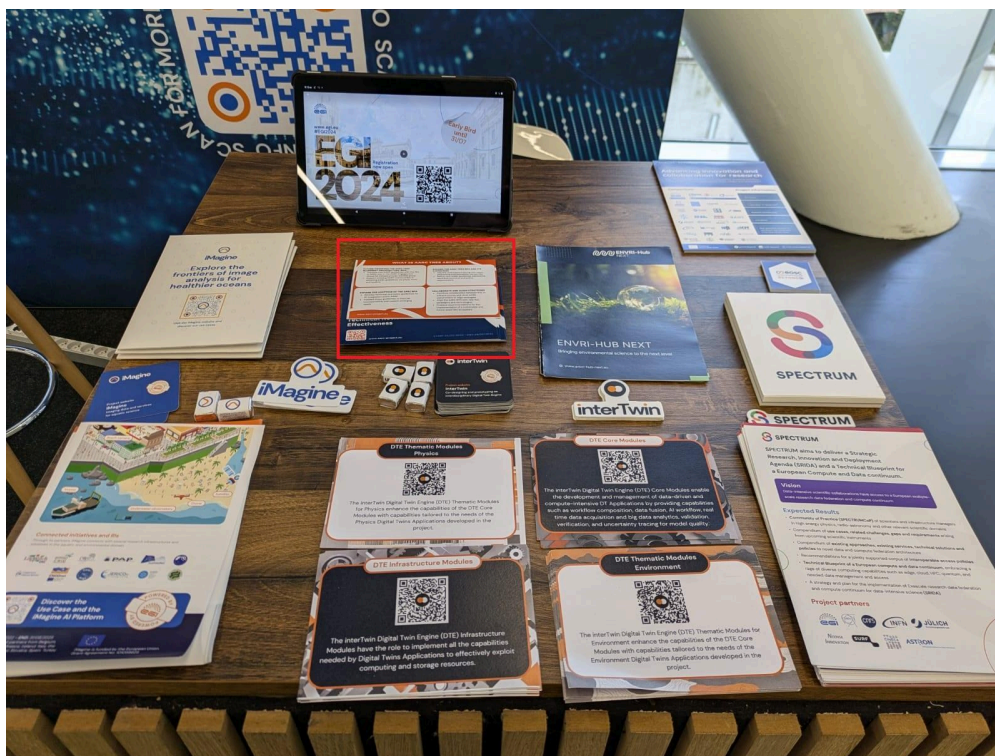


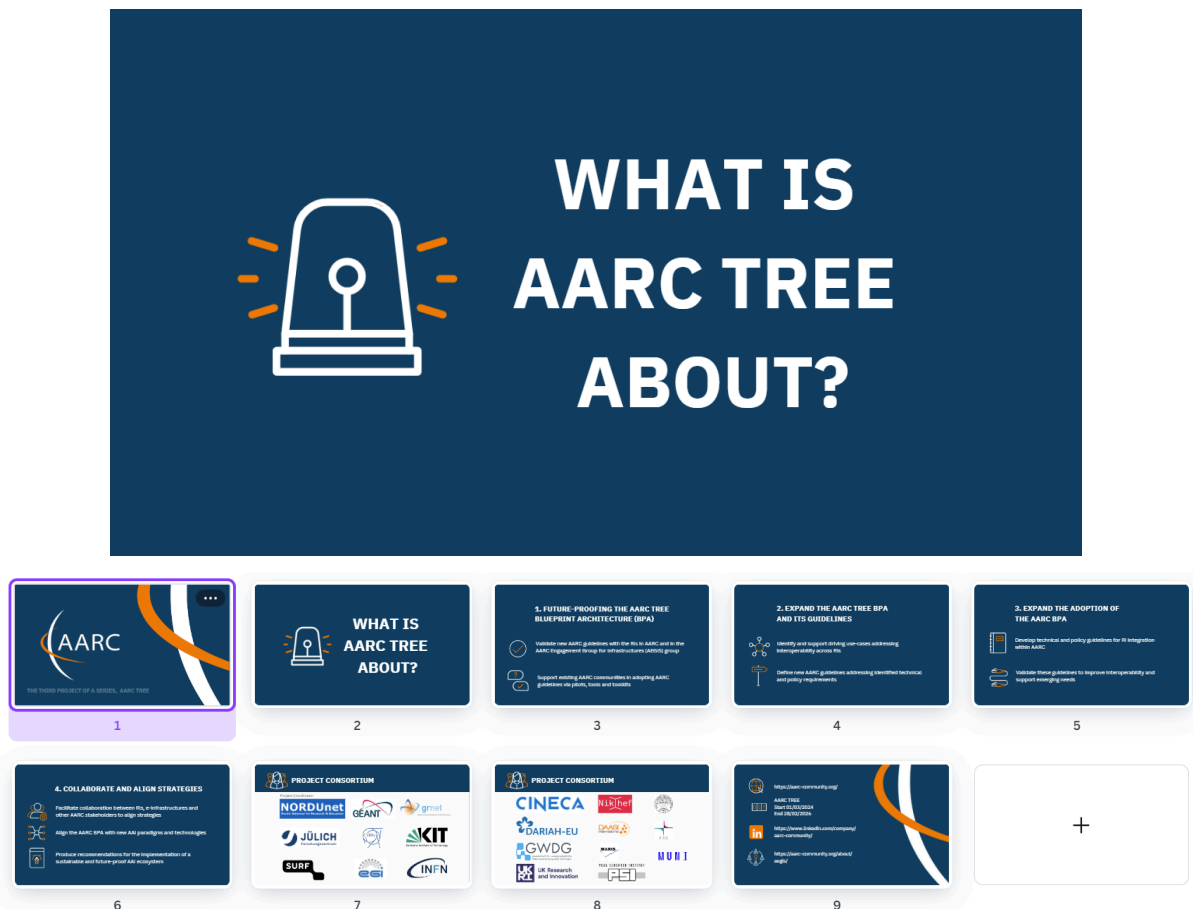
Figure 2: AARC TREE Postcards at the EGI booth at TNC24

3.1.3. Videos

WP7 will work on producing several videos about the project to exploit the rapidity of videos over written materials. At the moment, the plan is to create the following videos:

- **Project Introduction Video:** This video provides a high-level overview of the AARC TREE project and its goals. It can be used on the website, social media channels, event presentations, and webinar openings.
- **WP and project activities overview:** These videos can showcase the specific expected outputs of WP and are to be used on social media channels and event presentations.

- Project webinar recordings: They will be shared for broader dissemination of valuable content. The recordings will be shared on social media with a link to the YouTube playlist.



Figures 3 and 4: AARC TREE intro video. Cover and outline



Figures 5 and 6: Example of overview videos

3.1.4. Press

A Press Release was distributed among the partners at the signature of the Grant Agreement⁶, and a second one was produced on the occasion of the project Kick-off meeting in M1⁷.

3.2. Dissemination Tools

3.2.1. Events

All outreach activities need to be reported according to the following procedure: events are signalled during PMB meetings and further discussed during WP7 meetings if needed. Partners are encouraged to share their planned events in a dedicated table on Confluence. Reporting on past events will eventually also be streamlined via Confluence. WP7 will support events reporting for keeping track of the project’s activities on the website and aid partners in creating ad hoc materials if the case.

3.2.2. Workshops and Webinars

WP7 will ensure support to other WPs for the activities already defined in the proposal and for any other event that will be decided. We will work in close collaboration with WP3 to ensure proper support for the activities of community engagement with RIs, WP1 and WP2 to promote results, and WP5 to promote their interim results. The following table recaps the project events already listed.

WP	Type of Event	Target Groups
WP3	Use case requirements and consultation	RIs, Service and Resource Providers
WP2-WP3	Co-creation workshops with stakeholders	All stakeholders
WP5	Compendium workshop	RIs

Table 3: Project events (internal)

3.2.3. Scientific Conferences, Industry, and Policy Events

In addition to supporting the project events, WP7 oversees and supports the participation in external events. More will be added as the project progresses and more opportunities appear.

Event name	Start Date	Aim	Expected Presence
2024			
TNC24	10/06/2024	Engage with Service	Session organisation

⁶ <https://aarc-community.org/solid-ground-for-international-research-collaboration/>

⁷ <https://aarc-community.org/aarc-tree-project-open-for-business/>

Event name	Start Date	Aim	Expected Presence
		Providers, RIs, Research Communities	Presence at NDN and EGI exhibition booths
NDN24	10/09/2024	Engage with Service Providers	TBD
EGI24	01/10/2024	Engage with Service Providers, RIs, Research Communities	Poster in the exhibition
EOSC Symposium 2024	21/10/2024	Engage with the EOSC Ecosystem	TBD
EUDAT 2024	03/12/2024	Engage with Service Providers and Research Communities	Talk in a session
Internet2Exchange / REFEDS co-located meeting	09/12/2024	Service Providers	TBD
2025			
FIM4R Workshop	08/12/2024 (co-located with InternetTechEx)	Research Communities, Service Providers	
ENVRI Week	2025 TBD	Engage with RIs and Research Communities	Talk in a session
DARIAH Annual Event	Late Spring 2025	Engage with RIs and Research Communities	Talk in a session
TNC25	09/06/2025	Engage with Service Providers, RIs, Research Communities	Talk in a session, presence in the exhibition
EGI2025	June 2025	Engage with Service Providers, RIs, Research Communities	Presentation in the AAI session
NDN25	2025 TBD	Engage with Service Providers	Talk in a session

Table 4: Project participation in external events

3.2.4. Key Messages

AARC TREE has formulated a couple of key messages that convey the project's essence to its main stakeholders. These messages will be diversified to reflect the different stakeholders' interests as the project progresses.



Figures 7, 8 and 9: examples of key messages to stakeholders to be used on different project channels.

3.2.5. Platforms

To facilitate internal communications, the project has set up a Signal channel that all project partners can join.

3.2.6. Repositories

The standard publication repository for AARC TREE outputs (including deliverables, presentations, scientific publications, and posters) will be deposited in the Zenodo repository⁸ to increase their visibility. The Zenodo analytics tools will be used to assess views and downloads for all publications. The AARC website⁹ will list project outputs with a link to Zenodo, to avoid duplication, views/download dispersion and facilitate reporting.

3.2.7. Publications

All project publications (including presentations and public deliverables) are made available via [Zenodo](#).

4. Dissemination and Communication Metrics

Throughout the project, WP7 will monitor Communication and Dissemination activities regularly. Social media analytics will be monitored monthly. For events, the project relies on self-reporting by project partners according to a procedure that will be defined in M8. Other project Communication and Dissemination activities (such as newsletters, scientific and non-scientific articles, materials

⁸ <https://zenodo.org/communities/aarc/>

⁹ <https://aarc-community.org/aarc-tree-project/>

produced, ...) are captured via a Google form. This form allows T7.1 to assess the impact of the activity (e.g., the number of people reached).

Category	Channel	Metric	M24 target value
Communication	LinkedIn	Followers	300 at the end of the project
Communication	LinkedIn	Engagement per post	5% ¹⁰
Dissemination	Events	Number of international events with project presence	15
Dissemination	Workshops and Webinars	Number (online and in person)	4
Dissemination	Workshops and Webinars	Post Event Satisfaction score	4.5/5
Dissemination	Publications	Downloads and views of project publications (Scientific publications, presentations, public deliverables)	300 views 250 downloads

Table 5: Dissemination metrics

¹⁰ Note that engagement % typically decreases when follower count increases