



# DELIVERABLE

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## D6.1 Stakeholder Engagement Plan

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Dissemination Level

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| P | Public   | x |
| C | Confidential, only for members of the consortium and the Commission Services |   |

## Revision History

| Revision date | Version | Summary of changes   |
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| 05 June 2013  | 0.1     | First draft  |
| 26 June 2013  | 0.2     | Revisions throughout following comment from Marnix van Berchum, Alastair Dunning, Beth Daley, Aubéry Escande |
| 09 July 2013  | 0.3     | Alignment with Europeana Creative deliverable ( <u>Dissemination Plan Including Stakeholder Analysis</u> )   |
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| 29 July 2013  | 0.5     | Revisions throughout following comment from Alastair Dunning, Julia Fallon, Mary Rowlatt.                    |
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# 1. Introduction

Europeana Cloud (eCloud) is a Best Practice Network, coordinated by the Europeana Foundation. It will design, create and launch a cloud-based ecosystem for Europeana and its aggregators. Once complete, this new infrastructure will be used by the project to deliver fresh content and metadata to Europeana. Tools and services for researchers will also be developed by eCloud and supplied through the cloud, as will a new linked storage system.

## 1.1. Purpose of Plan

This Stakeholder Engagement Plan is a first attempt to identify the many categories of stakeholders whom the eCloud project needs to reach. In its current form, the plan outlines some basic guides for communicating with stakeholders. This includes the:

- overall objectives of eCloud communication;
- primary stakeholder groups, their importance to the project and the most important messages to be conveyed to each group;
- methods which will be used to reach each stakeholder group;
- main communication tools and mechanisms;
- core principles behind the timing and monitoring of eCloud communication.

Finally, this plan summarises the engagement responsibilities of the project partners, Work Package leaders and WP6 (Dissemination) team respectively.

## 1.2. Constraints

eCloud is a complex, cutting-edge project that is currently (July 2013) in the early stages of development. Much of its work is exploratory and some of its outcomes are uncertain. Its tools and services are not yet wholly predictable, the efficiencies that it will deliver are not yet quantifiable and the advantages of the cloud approach will, to a large extent, only be identified and articulated in the course of the project.

These factors affect the precision with which stakeholder communication can be prescribed at the outset of the project. This plan, therefore, necessarily focuses on the high-level principles of stakeholder engagement. It will be reviewed every six months as the cloud technology and associated content and services envisioned by eCloud come to fruition.

## 2. Communication objectives

When communicating about eCloud, our core objectives are to:

- Build awareness of the project;
- Promote the benefits of collaboration, especially to members of the Europeana Network;
- Promote the services that are developed by the project, particularly by encouraging research communities and other users to re-use of eCloud content;
- Helping developers to produce innovative tools that interact with eCloud;
- Encourage content holders and aggregators to provide content;
- Stimulate post-project adoption of the cloud infrastructure by aggregators and content providers.

### 3. Key messages

The key messages of Europeana have served as a base for the messages to be sent by eCloud. Europeana's high-level key messages are:

1. Europeana makes culture available to everyone;
2. Europeana connects Europe;
3. Europeana supports economic growth.

For eCloud, the high-level messages about the project can be summarised as follows:

#### **Key message 1. A transformative infrastructure.**

eCloud will transform Europeana's infrastructure. Through the use of cutting-edge technology, it will bring a new 'ecosystem' approach to aggregation in the cultural heritage sector. This will include the ability to share data more easily, to create sub-aggregations for specific audiences, to enrich metadata and to feed the improved metadata back to content providers. The shared infrastructure of eCloud is also expected to allow users of the cloud to reduce expenses by, for example, lowering data storage costs and creating efficiencies of scale.

#### **Key message 2. High quality content.**

Both metadata and digital content will be managed and exposed within the cloud. The project will make 7.4 million pieces of new content available to users of the Europeana ecosystem of services (5 million digital objects and 2.4 million additional metadata records). Objects will be selected with the goal of creating a significant and useful resource for researchers.

#### **Key message 3. New tools and services to support innovation and re-use.**

In addition to the creation of a cloud infrastructure, eCloud will also launch a platform known as Europeana Research. This will demonstrate the value of the cloud and the various tools and data that can be accessed through it (eg. innovative visualization-based approaches to discovery, document annotation or semantically-enabled access to metadata and content). The initial target audience will be researchers from the Humanities and Social Sciences domains. As the cloud develops, the target audience may broaden significantly.

#### **Key message 4: Sustainability.**

One of the key tasks of the eCloud project is to consult with cultural heritage institutions and aggregators to identify, through broad consensus, a legal and economic framework for the post-project sustainable continuity of a cloud-based ecosystem that will support sharing and re-use. The cloud infrastructure will be scalable to allow the easy incorporation of new content, tools and services, and to enable more sharing and greater efficiencies.

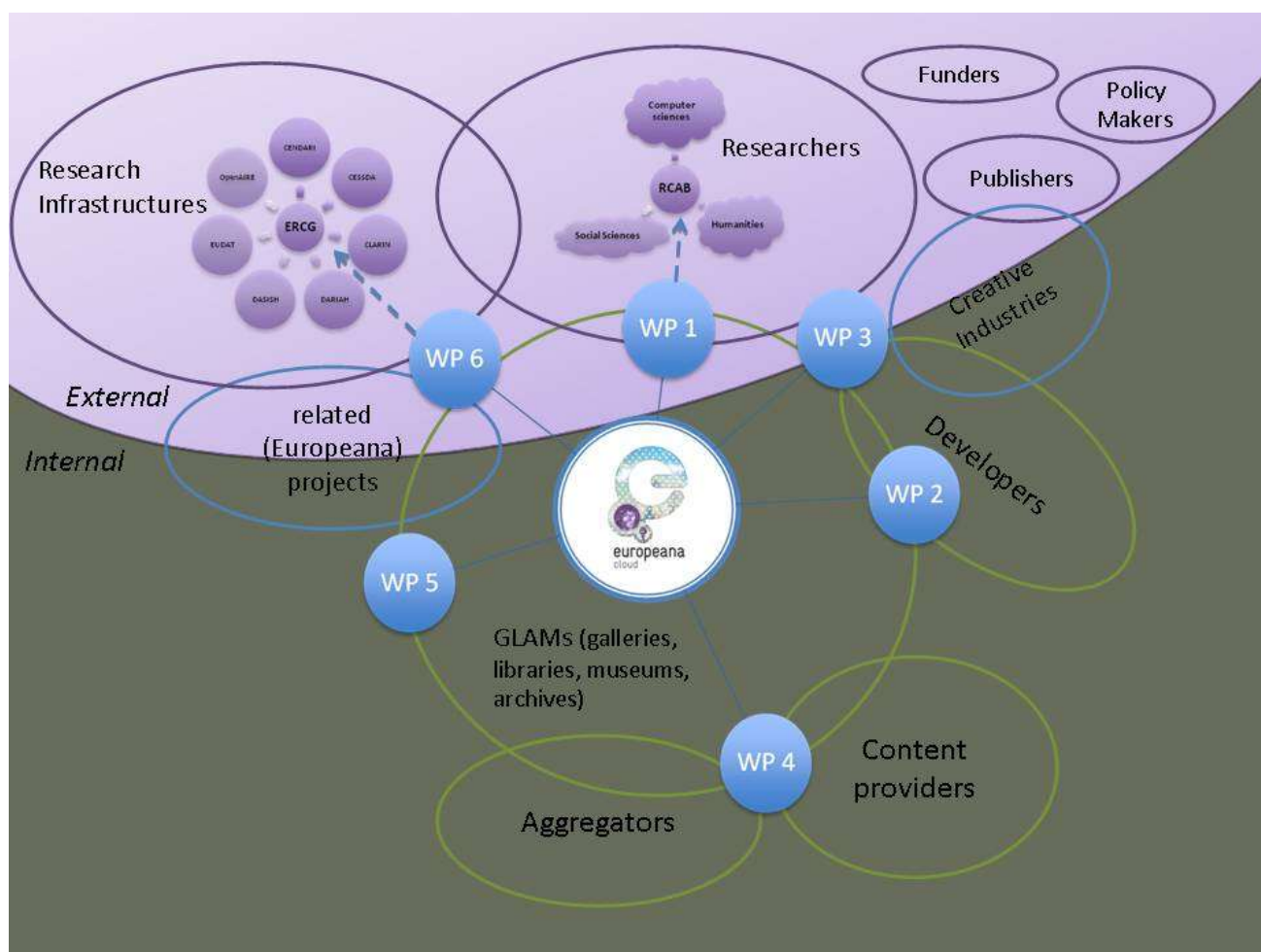
## 4. Stakeholder analysis and engagement

### 4.1. Stakeholder overview

This project needs to reach a wide range of stakeholder groups. Some of these groups already have strong ties to the project (defined as 'internal' in the diagram), either because they are partners in the project, or have an existing relationship with the Europeana Network (eg. they contribute to Europeana or are members of other Europeana-branded projects). These 'internal' partners nevertheless need to be kept informed about developments across the project as a whole.

Others stakeholders such as researchers and policy makers are considered 'external'. Some groups such as existing Europeana projects (eg. Europeana Newspapers, Europeana Creative, loCloud) could be considered both internal and external stakeholders.

The entire stakeholder universe of eCloud is represented in the following diagram. The relationship between eCloud Work Packages (WPs) and the various stakeholder groups is also illustrated.



The diagram additionally shows a number of sub-groups, outside of the main work packages, who will help to reach stakeholders:

- The Europeana Research Co-ordinators' Group (ERCG) is the project link with Research Infrastructures including CENDARI, CESSDA, CLARIN, DARIAH, DASISH, EUDAT and OpenAIRE);
- The Cloud Co-ordination Group brings together related projects from within the Europeana family under the auspices of WP5;

- The Research Communities Advisory Board (RCAB), reinforces links between the project and researchers, particularly in Computer Science and SSH disciplines, through the work of WP1.

#### **4.2 General Approaches to Stakeholder Engagement**

The overall communication and dissemination work of eCloud can be split into four complementary approaches:

**General dissemination** will take place in a variety of ways, for example the eCloud website, communications opportunities offered by the Europeana Network (eg. network newsletter, community workshops), conference presentations, press articles and other common promotional methods. Through these channels, activities and materials we will share learning points, success stories and calls for collaboration in a way that appeals to a wide variety of stakeholders. These communications efforts will be written in an easy-to-understand style.

**Targeted communication** is the means by which eCloud will engage with three specific sets of stakeholders:

1. Research Infrastructures will be engaged through Task 6.2, which will oversee the formation of a Europeana Research Coordinators Group (ERCG). The ERCG will be the vehicle through which eCloud will carry forward communication with and about Europe's Research Infrastructures.
2. Task 6.3 will create a Communication Plan for researchers.
3. Task 6.4 will ensure engagement with content aggregators, developers, IPR specialists and the extended Europeana community of services, policy makers and funders.

Other Work Packages also deal with specific stakeholder groups at different points in the project.

**Alliances** will be sought with, for example:

- Other key projects within the Europeana family, for instance Europeana Creative;
- Research infrastructures to help ensure that eCloud complements their strengths and that the project capitalises on their understanding of research needs and benefits from their connections with the research communities;
- Relevant digital library projects and services worldwide.

**Advisory boards**, workshops and other consultative fora will be arranged at appropriate points in the project to consult with relevant stakeholders and share information about eCloud.



### 4.3. Key messages

The following table shows the particular importance to eCloud of each stakeholder group, and the most important messages that the project will endeavour to put across to each of those groups. The groups are listed in decreasing order of importance.

| Stakeholder              | Important to project because:  | Messages  | How engaged  |
|--------------------------|--|---|--|
| <b>High Priority</b>     |  |   |  |
| Research Infrastructures | <p>They are building infrastructures with strategic overlap with eCloud; need to encourage long-term harmony between structures.</p> <p>They can inform eCloud about tools and services required by researchers in specific disciplines.</p> <p>They are a way to channel news and information about eCloud to communities of researchers.</p> <p>They can share examples of successes, failures, and good practice based on experience.</p> | <ul style="list-style-type: none"> <li>• 'The eCloud infrastructure, along with its associated tools and services, will be built in context of existing research infrastructures; Let's work together on this'</li> <li>• The Europeana Research Coordinators Group (ERCG) will help to align strategy across RIs, reducing duplication and overlap</li> <li>• Tools are being developed that are tailored for AHSS researchers</li> <li>• Discipline-specific services, sub-aggregations and tools are feasible</li> </ul> | Task 6.2.2 will deliver a Communication Plan for the ERCG  |
| Content providers        | They will use the service, and will provide the high-quality and volumes of content to ensure that eCloud meets the approval of HSS researchers.   | <ul style="list-style-type: none"> <li>• Your public domain and Creative Commons licensed content can be effectively shared with a wide community of users through the eCloud project.</li> <li>• eCloud is building a series of services for content providers and would like to know which services you would find most valuable.</li> </ul>  | WP5 will engage with content providers and aggregators; Task 6.4.2 will deliver a Europeana Content Aggregators Communication Plan |
| Aggregators              | Aggregators are future users of the eCloud service. Their input is essential in determining how future service should be shaped. A high level of aggregator engagement will help eCloud to capitalise on its full potential.   | <ul style="list-style-type: none"> <li>• eCloud is building a series of services for aggregators and would like to know which services you would find most valuable.</li> <li>• eCloud offers many benefits and efficiencies, and gives you the ability to provide tailored services that support innovation and re-use among your user community.</li> <li>• eCloud is taking a consensual approach to developing a legal framework and governance structure, into which Aggregator input is essential</li> </ul>          | WP5 will engage with content providers and aggregators; Task 6.4.2 will deliver a Europeana Content Aggregators Communication Plan |

|  |  |   |   |
|--|--|---|---|
| Project partners   | Each partner represents one or more of the stakeholders listed above.  | <ul style="list-style-type: none"> <li>By working together to deliver the best cloud infrastructure possible, we will benefit not only Europeana but also our own organisations. A high-quality project will build our reputation as knowledgeable, innovative and reliable project partners.</li> <li>As project partners, we all have a responsibility to help to promote the project by linking to it from our own websites, and by using our various communications channels to relay news, messages and promotional materials to our networks of researchers, funders and other stakeholders. This is known as the 'multiplier effect'.</li> </ul> | Basecamp (general awareness); workshops and events (in-depth awareness and participation)   |
| <b>Medium Priority</b>   |  |   |   |
| Related EU projects (e.g. Europeana Newspapers, IoCloud, Europeana Creative) | They have good links to specific Europeana user communities and can therefore help with raising awareness about how eCloud will contribute to Europeana's development. | <ul style="list-style-type: none"> <li>By helping us to better understand and serve the potential users of the eCloud project, we can improve the overall Europeana service and this is of benefit to all projects working to develop and provide content to Europeana.</li> </ul>  | Make alliances; WP6 to maintain a list of priority projects and contacts to ensure relevant eCloud dissemination reaches the right projects, and vice-versa. Additionally, the project coordinator will oversee a Cloud Coordination Group. |
|  | They are a place for eCloud to share and learn about best-practice working methods.  |   |   |
| Researchers, citizen scientists <sup>1</sup>                                 | Target consumers of the content and of the services developed by eCloud  | <ul style="list-style-type: none"> <li>You can help create the research tools of the future by letting the eCloud know what digital services for researchers are currently lacking.</li> <li>Europeana Research will offer access to APIs and other services for third parties to build tools on</li> </ul>   | WP3 and WP1 will work on researcher requirements. Closely linked to this will be the Researcher Communication Plan from WP6. It will make use of the RCAB and ERCA.   |
|  | Through WP1 and WP3, researcher requirements will inform the development of the project.   |   |   |
| Funders, EC policy makers  | May provide political and financial support for future phases of eCloud or provide funding for projects that could engage with eCloud                                  | <ul style="list-style-type: none"> <li>eCloud is a well run project with a thorough and innovative approach to developing cloud-based solutions for the cultural heritage sector.</li> <li>Other EU-funded projects should engage with</li> </ul>   | General dissemination through WP6.  |

<sup>1</sup> [http://en.wikipedia.org/wiki/Citizen\\_science](http://en.wikipedia.org/wiki/Citizen_science)

|   |   |  |  |
|---|---|--|--|
|   |   | <p>Europeana and eCloud in order to benefit from the latest cloud technologies and save costs</p> <ul style="list-style-type: none"> <li>• Projects that work via the cloud to enrich or extend Europeana offer value for money and the cultural heritage sector should therefore include a cloud-based approach in its future digital planning.</li> </ul>  |  |
| Developers  | They are critical to further tailoring and development of eCloud data. This will in turn help to realise the wider benefits of the cloud approach   | <ul style="list-style-type: none"> <li>• The cloud will offer an API and SPARQL services for developers to build with.</li> <li>• Extensibility and availability for tailoring of tools and services</li> <li>• Cloud approach offers long-term agility in maintaining underlying software and source code</li> </ul>  | Address through Task 6.4.4   |
| Global network of cultural heritage institutions who are working to put digital resources online. | They have similar interests, priorities and challenges to Europeana and will therefore see similar value in a cloud-based system. By sharing the work of eCloud, we can establish the project and Europeana as a leader in this area. | <ul style="list-style-type: none"> <li>• There are numerous benefits of a cloud-based infrastructure, namely a better service for users and content providers and cost-savings for your network.</li> <li>• The eCloud project is a key way to learn about best-practices related to cloud-based infrastructures. It can help your organisation address issues surrounding financial sustainability, technical obstacles to participation and legal frameworks for participation.</li> </ul> | Address through Task 6.4.3, supplemented by general dissemination activity   |
| <b>Low Priority</b>   |   |  |  |
| Creative communities  | Will demonstrate the potential for the creative re-use of cloud-hosted content  | <ul style="list-style-type: none"> <li>• eCloud provides the rich content and tools that are needed to better share, re-use and build upon digital content and metadata contained within the Europeana ecosystem.</li> </ul>   | Maintain alignment with Europeana Creative, which will be the primary vehicle for contact with 'creative' stakeholders |
| Publishers  | Potential source of additional Europeana content.   | <ul style="list-style-type: none"> <li>• eCloud gives publishers a new opportunity to include their content in Europeana via an innovative infrastructure.</li> <li>• This infrastructure supports the development of stronger links between cultural heritage content and publisher-provided content</li> </ul>   | General dissemination; ensure OAPEN's membership of eCloud is fully exploited  |

#### 4.4 Materials and channels

The eCloud project will use a number of materials<sup>2</sup> to help reach key stakeholder groups. They are:

- Powerpoint presentation and template
- eCloud factsheet (with more to be created for specific audiences)
- Project logo
- Growing library of images featuring project events and content to be hosted in the cloud
- Video overview of the project (to be created by end 2013)

By combining these materials with various channels at our disposal (eg. website, newsletter, workshops, press releases, social media), we can effectively communicate with our target audiences. The relationship between the various stakeholder groups and channels is shown in the following table.

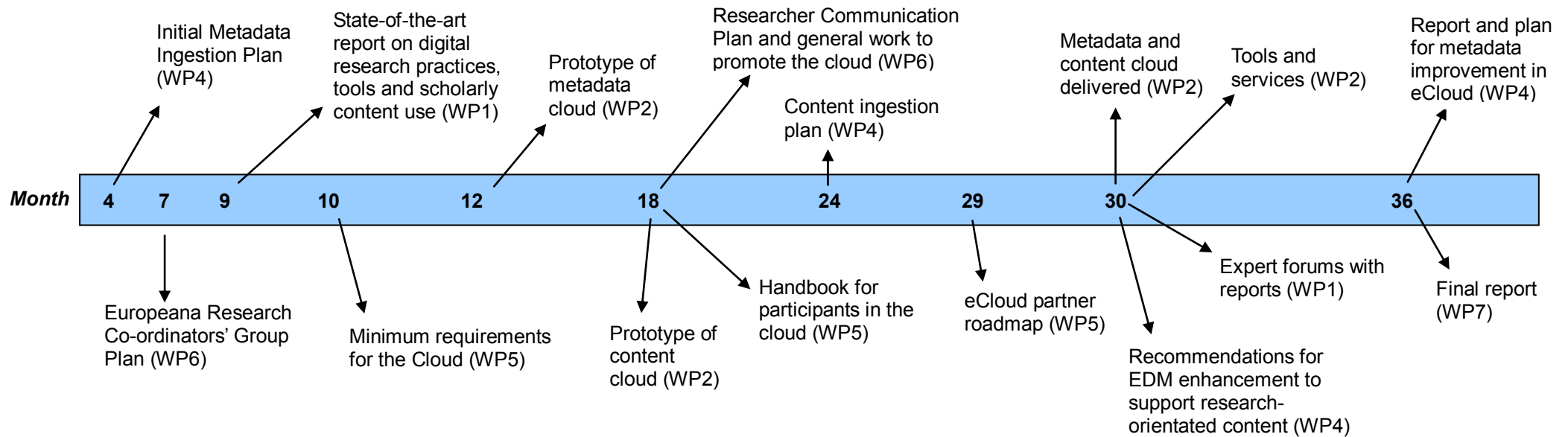
| <b>Methods</b>                           | <b>eCloud website</b> | <b>eCloud newsletter</b> | <b>Social media (eg. Twitter, LinkedIn)</b> | <b>Presentations at externally organised conferences</b> | <b>Publications in related professional newsletters and journals</b> | <b>Workshops, facilitated by WP1 and WP3</b> | <b>Press releases</b> | <b>eCloud final conference (open to the public)</b> | <b>Basecamp (internal project management system)</b> |
|--|-----------------------|--------------------------|---|--|--|--|-----------------------|---|--|
| <i>Stakeholders</i>                      |                       |                          |   |  |  |  |                       |   |  |
| <i>Project partners</i>                  | ✓                     |                          | ✓   |  |  | ✓  |                       | ✓   | ✓  |
| <i>Partners in related EU projects.</i>  | ✓                     | ✓                        | ✓   |  |  |  |                       |   |  |
| <i>Researchers</i>                       |                       |                          |   | ✓  |  | ✓  | ✓                     |   |  |
| <i>Content providers and aggregators</i> | ✓                     | ✓                        | ✓   | ✓  |  |  |                       |   |  |
| <i>Funders and Policy Makers</i>         |                       |                          |   | ✓  |  |  | ✓                     |   |  |
| <i>Developers</i>                        | ✓                     | ✓                        |   | ✓  | ✓  |  |                       |   |  |
| <i>Creative communities</i>              |                       |                          |   |  | ✓  |  |                       |   |  |
| <i>Publishers</i>                        |                       |                          |   | ✓  | ✓  |  |                       |   |  |

<sup>2</sup> <http://pro.europeana.eu/web/europeana-cloud/communication-tools>

|   |   |   |   |   |   |   |  |  |  |
|---|---|---|---|---|---|---|--|--|--|
| <i>Global network of cultural heritage institutions</i> |   |   | ✓ | ✓ | ✓ |   |  |  |  |
| <i>Research infrastructures</i>                         | ✓ | ✓ | ✓ |   |   | ✓ |  |  |  |

## 5. Timing of engagement

eCloud's dissemination activity will, to a large extent, be built around key deliverables and project meetings. WP Leaders will support this engagement work by keeping the WP6 team informed about the progress of their Work Packages. Examples of activity to be communicated are shown in the following timeline:



## 6. Monitoring engagement

WP6 will maintain a central record of all communications activity carried out by the project partners. This list will be assembled largely from the activities reported by partners (including size and type of audience), to the WP6 team as part of their regular 6-monthly reporting.

The WP6 team will also coordinate the collection of quantitative data, such as download counts, to show the impact of centrally-managed engagement activity. Where possible, eCloud workshops and partner events will also be evaluated qualitatively (eg. through surveys sent out after the event).

## 7. Responsibilities

Each **project partner** has been assigned a budget for dissemination. Partners will be expected to show initiative in exploiting local communication opportunities to share information about eCloud in appropriate ways, and to report their dissemination activity to the WP6 team as part of the 6-monthly reporting round.

All **WP Leaders** have some responsibility for communicating the progress and outputs of their work packages through appropriate channels, as well as for sharing details of their activities with the WP6 Working Group.

The **WP6 Working Group** will coordinate all the communication work of the project, oversee the development of the three targeted Communication Plans, maintain the currency of the website, produce the project newsletter, and lead on eCloud's social networking activity, working closely with the Europeana Foundation to maximise the impact of social networking through blog aggregation and re-tweeting. WP6 will also be responsible for maintaining awareness of relevant activity in related projects and disseminating news from those projects to the eCloud partners; and the WP6 team will ensure that such projects in turn help to spread key messages about eCloud.

The WP6 Working Group will additionally support the WP Leaders and the partners in the following ways:

- Maintaining project partners' awareness of eCloud objectives and progress
- Equipping eCloud partners and WP Leaders with relevant materials and, where required, guidance, to support their dissemination work
- Maintaining a central register of forthcoming events and other dissemination opportunities
- Collating a central record of eCloud dissemination activity
- Ensuring that the impact of dissemination activity is, wherever possible, measured and documented.