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Abstract:

This document presents the outreach and liaison goals, tools and self-assessment methodologies of the e-FISCAL project. The document contains also some initial results of the outreach and liaison activities that the project has already engaged in.

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DISCLAIMER

e-FISCAL is a Research Infrastructure Project co-funded by the GÉANT & e-Infrastructure Unit of the Information Society & Media Directorate General of the European Commission. e-FISCAL targets computing e-Infrastructure providers, national funding agencies, scientific communities, as well as European Union policy makers. e-FISCAL is supported by an external Advisory Board (AB). This deliverable has not been reviewed by the AB.

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EXECUTIVE SUMMARY

This document presents the overall outreach and liaison goals of the project, as well as the tools and processes used to reach them. The project has specific features that require attention: short lifetime and an overall goal of influencing policy formation in Europe. Hence the project's outreach and liaison activities need to be shaped in a way that – despite its short lifetime – it will be able to get its message to its relatively distinct and difficult to reach audiences.

For this purpose the project will align all of its outreach activities to support certain key messages, which will have slightly different priorities during the project. When possible, the project will focus on using channels that the key audiences follow as part of their normal activities, and will limit establishing dedicated channels to situations where it is effective and necessary (for example when communicating with the financial experts).

The above approach will also allow keeping the tool palette of the project simple. The project will use its website and mailing lists for online communication, organise dedicated workshops and participate in relevant events organised by others to spread its message. These activities are supported by project's internal web-based collaboration system. Based on the feedback received through these channels, the project will periodically evaluate the impact of its dissemination activities and will – if necessary – adjust its approach. Finally, promotion of project outputs and services will also consider the use and uptake of project results beyond the project lifetime, e.g. the website and tools developed (financial models, questionnaires) will remain available also after the project has ended.

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1 INTRODUCTION

1.1 Scope of the document

This document outlines the project’s dissemination and outreach plan and the key mechanisms that are used to adjust the project’s approach to take into account new opportunities and challenges. The document also summarises the underlying impact model that is used to select the appropriate channels and approaches.

1.2 Target Audiences

The document is mainly intended as an internal reference and working document for the project. However, it can be of interest to other projects engaging in activities that require targeting similarly distinct specialist groups that have had limited contact with each other (as is the case with the key expert stakeholder groups of the e-FISCAL project: financial and e-Infrastructure experts).

The document will also be useful background document for anyone interested in collaborating with the project, or interested in exploiting its outputs.

1.3 Structure of the document

Chapter 2 presents the overall goals of the dissemination and outreach activities of the project. Chapter 3 presents the key tools that are used for these purposes, and chapter 4 outlines the project’s plans for monitoring and adjusting its approach as needed. Finally, chapter 5 briefly summarises the sustainability plans for making the project outputs available after the project’s lifetime.

1.4 Terms and definitions

HPC	High Performance Computing
HTC	High Throughput Computing
NGI	National Grid Initiative
PRACE	Partnership for Advanced Computing in Europe, biggest HPC computing initiative in Europe

Table 1 - Terminology

2 Goals of the dissemination and liaison activities

The project's impact is dependent on identifying and reaching the key audiences, and – in case of the respondents of the survey and policy makers – motivating them into action. The project will also aim at producing material of interest to the broader audience, mainly as a tool for increasing the project's ability to reach the key audiences indirectly, and to ensure that its results will be taken into account in the potential future studies in the field as an important part of the state of the art.

2.1 Intended impact of dissemination activities

The desired impact of the dissemination activities is attracting positive attention of the parties the project wants to liaise or collaborate with. This attention will make it easier to reach and motivate survey respondents to answer the questionnaire, and will also ensure that the project's results are taken into account when formulating relevant e-Infrastructure policies in Europe. The further development and take-up of the models and tools developed by the project in future cost assessment exercises are also goals supported by the dissemination activity.

Thus the metrics defined for the dissemination activities can measure only some quantitative aspects of the *potential* for positive impact, but it will not be possible to measure the impact directly as it depends on various qualitative aspects of the contacts made by the project team.

2.2 Liaison strategy

In its own activities the project aims at providing several possible levels of engagement to interested parties, with fluid transition from one level to another. Due to the short lifetime of the project, it is important to focus sufficient attention to liaising with organisations and initiatives that can act as amplifiers of project's messages.

Another strategic choice taken due to the project's short lifetime is – when possible – assign contact persons to handle all communication with a particular contact instead of splitting the work based on the type of the task (survey communication vs. general dissemination).

2.3 Audiences

The table below summarises the audiences that are of particular interest for the project.

Audience	Mode of engagement	Channels
NGIs	Participation in the survey, promoting results	NGI liaison & other channels through EGI (including personal contacts)
PRACE sites	Participation in the survey, promoting results	Project's contacts in PRACE organisation (technical mailing lists, personal contacts)
Policy bodies such as e-IRG and projects such as EuroRIs-Net series (Capacities/Research Infrastructures National Contact Points)	High-level awareness raising (progress reports)	Personal contacts

Organisations promoting e-Infrastructure and ICT solutions (such as e-ScienceTalk or European Multimedia Forum)	Close collaboration (e.g. collaboration in writing articles, disseminating press releases) in popularisation of the project's results	Formal and informal project collaboration
User communities	Detail-level dialogue about methodology and relevance	Conference participation (talks, posters) and rapid reaction to contacts via project's website.
Researchers (economics), IT services industry	Publication-based liaison – cross-promoting academic works	Personal contacts

Table 2 – Potential liaison partners

2.4 Key messages

Due to the diverse nature of the target audiences, the project also has several distinct key messages. Due to the different interests of these audiences, the time when these messages should be brought forward in the most concentrated manner differs slightly. The table below summarises the audiences, key messages and the timing of the peak outreach actions.

Audience	Key message	Project period of emphasis
NGIs	Accurate information about costs and cost structures benefits everyone (it is a prerequisite for sustainability)	Launch of the survey to beginning of analysis
PRACE sites	As above	As above
Policy bodies such as e-IRG and projects such as EuroRIs-Net	e-FISCAL project exists and should be supported (promotion, contacts)	Survey midpoint to end of the project
Organisations promoting e-Infrastructure and ICT solutions (such as e-ScienceTalk or European Multimedia Forum)	e-FISCAL project results should be included in any future state of the art analysis	From time of publishing initial results to end of the project
User communities	e-FISCAL results show potential savings through shared e-Infrastructure services	From time of publishing initial results to end of the project
Researchers (economics), IT services industry	Cost assessment of HTC and HPC infrastructures is interesting challenge that is of broader relevance	Just before publication of final report

Table 3 – Key messages and crucial time periods

3 Dissemination and liaison tools

The project uses relatively standard tools to support its dissemination and liaison activities. The role of these tools is mainly to provide initial contact points and areas of interest that allow forming of more personalised relationships managed by the project contact persons.

3.1 Website

The project website is based on a modern content management system (CMS) that allows sharing the editing and updating responsibilities. The project website is accessible through both www.e-fiscal.eu and www.efiscal.eu URLs (former will perform an automatic redirect to the latter).

To make the project more personable and easy to approach, the website presents also personal profiles of the people working with the project (<http://www.efiscal.eu/team>), in addition to listing of partners and project work packages.

3.1.1 Public state of the art repository

The website also hosts the “*state of the art*” repository of publications related to cost assessment of ICT infrastructures. Making this resource (which is necessary for the execution of the project) public supports engagement with the research community by gradually making the project website a useful starting point for other research projects looking into cost analysis of ICT infrastructures.

The project has also started contacting the main authors of the publications as they are included in the repository, which allows the project to create more personal relationship with the experts in the area that in addition to the outreach and liaison activities will also support the execution of the survey itself. The authors that respond to these notifications will also be invited to project workshops through mailing lists.

3.2 Mailing lists

The project will host one main dissemination mailing list (update@efiscal.eu) that is used to send major announcements, such as initiation of the survey or announcements of the workshops arranged by the project.

In addition to this channel, project uses a separate mailing list for experts closely collaborating with the survey. There are also mail addresses or lists for advisory board, questions related to survey execution and a generic contact address (info@efiscal.eu). These resources are shared with the whole project.

3.3 Event participation and organisation

The project will organise two open workshops to promote itself and to gather feedback about its approach. The first of these events was held (at EGI Technical Forum on 21st September 2011), with a specific focus on the HTC community. The next event will be similarly co-hosted with a major community event. A suitable PRACE event for co-location will be selected and communicated by the project soon after January 2012.

In addition to these open events, the project is considering arranging a working meeting with its expert community (survey respondents and possibly invited experts). This will allow the project to create strong

links to the individuals and groups that should take up the results of the project. Project is also planning to collaborate with other EC-funded projects in these events (negotiations on-going), in order to further increase the impact of the work.

In addition to the events arranged by the project itself, all project partners are actively seeking opportunities to promote project in various events.

4 Self-assessment and adaptation plans

The project will periodically review and analyse the activity on its website, for example to identify trends in sources of traffic (search engine phrases or referring sites) that indicate opportunities or challenges the project should address. The focus will be on the quality of the visits rather than the pure number of them – ideally the project website should have a number of visitors that visit the site frequently and study its content in more detail, rather than thousands of new visitors that view only few pages before leaving the site.

The project will also develop processes (possibly with tool support) to ensure that all of the indirect communication channels, such as the ones outlined on Table 2 on page 9, remain active and are seen as beneficial to both parties.

4.1 Initial outreach and liaison results

4.1.1 Workshop at EGI Technical Forum (Lyon, September 2011)

The project held a workshop at the EGI technical forum on the 21st September 2011. Since project had started only a month and a half earlier in the middle of the holiday season, it was not possible to advertise or plan the event well in advance. Despite this, the workshop had around 20 participants engaged in lively discussions about broad range of topics related to cost assessment of ICT infrastructures.

The workshop summary has been published on the website and some of the dissemination material has been updated to take the workshop into account¹.

4.1.2 Presentation in the NGI International Liaison meeting

The project was presented in the kick-off of the NGI International Liaison's meeting² that was hosted by the project partner EGI.eu in Amsterdam on November 10th 2011. This event was devoted to the creation of a formal NGI non-technical contact to improve communications between EGI.eu and NGIs. All participants received the project flyer, the factsheet and had a chance to comment on the project.

4.1.3 Press release (12th December 2011)

The project made a press release to announce the project and the initiation of the survey to the broader audience. The press release was launched through several channels (such as Cordis Wire and AlphaGalileo³), and was picked up by publications HPCWire, iSGTW, RoadRunner⁴, DallasNews⁵ and OSSREA⁶, among others. The days following the press release saw the number of visits to the project website roughly triple compared to the normal level of activity, and the quality of the traffic generated was high (according to the criteria set up in the beginning of the Chapter).

¹ <http://go.egi.eu/efiscal-workshop-2011>

² <https://www.egi.eu/indico/event/659>

³ <http://www.alphagalileo.org/ViewItem.aspx?ItemId=115381&CultureCode=en>

⁴ <http://www.rr.com/>

⁵ <http://topics.dallasnews.com/>

⁶ <http://www.ossrea.net>

4.1.4 Other outreach activities

The project was presented in the e-AGE 2011 conference⁷ in Jordan by the project coordinator, and the project will pursue opportunities to have a presence in other strategic events where major European e-Infrastructure initiatives present themselves. The project was also mentioned in a workshop organised by the Cloud4SOA project in the IEEE CloudCom conference in Athens⁸ where ETL was representing another project.

The project partners have also used their own websites and blogs as communication tools to announce the launch of the project. There is also an on-going collaboration with the e-ScienceTalk project, e.g. the workshop organised in the EGI-TF event was blogged in real-time on the GridCast site maintained by the e-ScienceTalk.

4.2 Observations and analysis of the initial results

Based on anecdotal evidence, it seems that events where the project presents itself to genuinely new audience (such as e-AGE event) bring in a level of interest that can be seen as increased traffic to the website. Similarly, the strong response to the press release indicates that the project is seen as relevant, also outside the “core” e-Infrastructure domain. On the other hand, it seems that a presence in the e-Infrastructure or Cloud research events does not bring a visible increase of traffic to the project website. As most of the participants in such events tend to know each other well, it is likely that the primary channel for the post-event interaction would be instant messaging or e-mails to continue discussions initiated in the events rather than return visit to the project website.

This observation means that the approach taken in the EGI-TF event – focusing on enticing participants to join the project mailing list, and steering them towards the project website only as a secondary option – is most likely the correct one for the e-Infrastructure events. The web presence is more important tool for the large events, where this individual approach is impossible.

Collecting and framing project’s major milestones and outputs in a way that can be made into a press release seems to be relatively cost-efficient way to raise the profile of the project. However, this outreach mechanism requires major investments, as relatively small project will not be able to produce outputs that would be considered newsworthy on continuous basis.

⁷ e-AGE 2011 - Integrating Arab e-Infrastructures in a global environment conference, organised by the Arab States Research and Education Network, EUMEDGrid Support, EUMEDCONNECT, and INTERNET2 in Jordan during 12-14 December, 2011. eage2011.asrenorg.net

⁸ <http://2011.cloudcom.org/>

5 Plans beyond the project lifetime

The project website will be maintained also after the project has finished and opportunities to ensure long-term curation of the *state of the art* repository will be sought. The latter could be managed either through continued activities of one or more project partners, or by handing the responsibility over to another organisation or project with interest in cost issues in ICT.

The tools and approaches related to actual execution of the survey will also be actively promoted as a valuable, exploitable output of the project. For example, the cost models developed by the project will be made available on the e-FISCAL project website also after the project has ended.

6 REFERENCES & RESOURCES

[1] The project website: <http://www.efiscal.eu/>