



OUTLOOK

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1 CONTEXT

The main goal of RISIS is “to support the production of new policy relevant indicators. It addresses a small but fast growing community, where Europe plays a world pivotal role and which is organized around two learned associations: The European association of indicators designers (ENID) that organizes the world central academic conference on indicators; and the European forum for research and innovation policy studies (EUSPRI forum). It addresses more widely researchers in the constitutive disciplines of the community that deal with science and innovation studies (in management, in economics, in sociology and in geography mostly). The project thus addresses directly and entirely the theme “Research infrastructures for the assessment of science, technology and innovation policies” by sharing the six central objectives set out by the call.”(RISIS2 DOW, 2018)

1.1 Vision of RISIS¹

“RISIS ambition is to be recognized by its core community as a central support for quantitative studies.”(Laredo, 2018)

To explain the previous statement two aspects of RISIS potential network needs to be pointed out:

- a) RISIS core community should be dedicated to ‘informing’ and ‘building evidences’ for policymaking, and this entails the scholars interested in higher education, research and innovation fields.
- b) The new positioning of quantitative studies in the field implies as much exploration and exploitation. The first must be implemented through a general development of tools and services. The second has been built considering the need for targeted, longitudinal harmonized and robust datasets and with a focus on ‘positioning’ indicators.

These studies target a policy audience constituted mainly by policymakers and analysts coming from different type of organizations: governmental ones, but also ‘professional ones’. RISIS also counts on an overall audience made by key stakeholders and ‘representative’ bodies (professional associations, civil society organizations).

1.2 Objectives

RISIS “must provide **“a front end of relevant indicators for policy that are fully open to all.”** This has two advantages: this will nurture an institutional recognition critical for the long-term future of the infrastructure, and at a shorter term, this will provide with important measures of RISIS ‘dissemination’ activities.

The overall objective is twofold (DOW, 2018):

- a) to increase the exposure to and the use of the RISIS infrastructure among academic researchers in the field of Science Technology and Innovation (STI) Studies in Europe and the integration of the STI scholars’ community;
- b) to develop an effective and continuous process of interaction between STI scholars, scholars from neighboring fields and stakeholders, in order to make RISIS data a key element of evidence-based policymaking for research and innovation.

These two central objectives translate into the vertical work packages RISIS have established, but they have been not made explicit in the project the transversal dimensions that are required. This is for

¹ Philippe Laredo, RISIS Working document, November 12, 2018.

RISIS Consortium critical that they are known to all members at the start of the project and incorporated in their duties.

2 PRIORITIES

The 4 dimensions that characterize RISIS vision deal with: (1) visibility, (2) accessibility, (3) exploration, (4) exploitation. In the following themes and actors linked to the RISIS goals' achievements discussed and agreed by the RISIS community are presented. It is important to recall RISIS priorities because they are supposed to drive communication and dissemination activities.

2.1 Priority themes and actions²

Visibility

RISIS must become visible for actors in the community, and its visibility is both academic and political/institutional and it translates into main central features related to the establishment and protection of RISIS brand and the visibility of RISIS data and RISIS-based indicators in policy reports and in academic articles.

Accessibility

RISIS ambition depends mainly on the accessibility of services and tools through three actions: the core action is to enable users to have a smooth 'distant' access to the data needed to accomplish their projects or research activities. The second action is related to the enlarged access to a set of tools and freely accessible resources through the harmonization triplet on actors, places and topics. The third action complains RISIS activity focused on societal challenges and missions, mobilizing and integrating KNOWMAK within it.

Exploration

RISIS2 contains two critical dimensions to explore the world of open data to test hypotheses and identify new ways in which robust datasets and 'indicators' could be produced: the bottom-up learning from sets of texts has been complemented by an approach based on ontologies that help to explore the open world on given predefined issues and select what could be relevant, the GATE way); the strategic role of OpenAIRE environment to enlarge access to services and tools and of Knowmak to enrich the use of RISIS data.

Exploitation

This point is related to what RISIS focus upon, and its 'core' datasets for the field that complement OECD based datasets. These datasets are developed because of the core interest for the field, but also because of the added value linked to their 'targeted' integration. Also RISIS tools must be implemented in term of interpretation, multiplying the 'open' resources researchers will have access to in the RCF.

² Philippe Laredo, RISIS Working document, November 12, 2018.

The support to researchers on accessibility of datasets and data uses is crucial. The activity plans for each dataset and for the development of overall access must extensively enlarge the activities associated with researcher support and the engagements that go with them.

2.2 SWOT Analysis

Considering the quoted documents, we can highlight opportunities and possible shortcomings we have to face for the RISIS development. To this aim we propose a SWOT analysis (Strengths, Weaknesses, Opportunities and Threats analysis), which might be helpful to individuate internal and external issues that could have an impact on the sustainability of the project. This is very important for interactions with the communities.

Generally, *Strengths/Weaknesses* are linked to the organizational context, and they deal with the internal attributes and resources that could give effort /vs represent barriers to the achievement of the project. *Opportunities/Threats* include external factors or dynamics that could favour/vs endanger the improvement of the project.

The text below problematized the main key-factors related to priorities and actions associated to RISIS achievements under the SWOT scheme.

Strengths

Datasets and Registers: 13 core Datasets plus other 4 datasets under preparation, and Registers of organizations and firms represent a bulk of unique resources for addressing policy relevant research questions.

KNOWMAK tool: its integration in RISIS infrastructure is crucial because it will become a central tool for researchers to understand RISIS datasets potential.

OpenAIRE environment: its integration enable access to OA community and the exploitation of the RISIS resources 'out there' in the web. RISIS has to materialize it.

Management of distant access: RISIS have developed a kind of "controlled access" through which users have their own workspace where they find all the freely available resources and the extracts of the RISIS datasets they need for their research activities.

Training and support on services: the access to datasets is accompanied by a series of services and support mechanisms: training (applied courses, methodological courses and summer schools), and advanced use of quantitative techniques (advanced methods, indicators and ontology settings).

Weaknesses

Brand coherence: RISIS has to become a 'covering' brand for all products (example for CIB, PATSTAT-IFRIS and CORTEXT for the Paris group) which must not be mentioned singularly anymore. The coherence of the brand depends on the effort of partners and coordination to follow the guidelines provided, paying attention to the use of Logo, copyright guidelines and coordinated graphics in all dissemination activities.

Internal communication: it is crucial to sustain visibility and achievement of RISIS core goals. RISIS partners have to be more aware about the need of a circularity in the exchange on information and output from RISIS WPs activities. The development of a workspace dedicated to the sharing of internal documents and inputs could be useful to overcome this current weakness.

Visibility of services: RISIS have to improve datasets and tools visibility through a set of coordinated activities, which could be gathered into 5 types: awareness raising, demonstration, accessibility (both of services and data, and of outputs), support for researchers and collective involvement.

Archiving of results: RISIS charter has been changed and incorporated as a dimension, and its internal archive has been reorganized, integrating it on Zenodo Space (OpenAIR) to DOIfy these results. This issue is strictly linked to partner's awareness (as for internal communication) on the importance of sharing results and materials on RISIS activities to enlarge RISIS network, its visibility and usability of data.

Opportunities

Enlargement of RISIS network scholarly community: RISIS have already built strong attachments by core communities; there is a central role of young researchers and they should be the focus of RISIS efforts (and this probably requires stronger links with doctoral programmes and the improving of both tutorials and 'model projects').

Interactions with policy makers: Through specific communication strategies, RISIS aim at a new strong positioning in STI and related fields, promoting a growing involvement of policymakers, which can be enabled to access aggregated data useful in their analysis. Possibly the integration of KNOWMAK into RISIS as core access to aggregated data could be an adequate answer (especially since it have integrated in RISIS2 the ability to address missions).

RISIS positioning in ESFRI roadmap: RISIS long-term sustainability' depends on the establishment of the infrastructure as a European infrastructure of interest in the ESFRI roadmap. The RISIS degree of sustainability will be the number of core partners (i.e. in charge of core datasets and of our services), which have been given this mission by their institution. RISIS objective is that the number is above 8 by 2020 so that we can enter in an ESFRI recognition process.

Threats

Spaces for users' interactions: the sustainability of RISIS services depends also on the exploitation of data and indicators, and RISIS provides a service where users can supply and find information linked to their experiences, results, problems deriving from the use of the infrastructure, free spaces for exchanges and data sharing, and for building collaborative efforts. The support and the collaborative exchange with a possibly growing community of users must be continuous, and sustainable by datasets managers and communication team.

Long-term exposure of RISIS: datasets supporting indicators required long-term efforts. To reach this goal teams, centres, groups or institutes must have an *official mission* (or responsibility and goal) to develop them, translating the long-term engagement of the institution, they belong to or are affiliated to.

Openness of RISIS and sustainability: the central effort of RISIS is to foster open science. However, the infrastructure still depends very much on privately owned public databases, out of which enriched datasets have been built and can be integrated. All the members responsible of such datasets have developed agreements for use for 'publishable research', and most of them have individual rights for exploitation in paid studies. But this does not apply to collective use and even less to public opening to the community, and for this reason it has been developed the principle of "indirect contracting". It must be assessed its robustness and clarify, in term of IP, use and open access.

3 AUDIENCES

The communication and dissemination activities developed are directed to a broad audience, composed by:

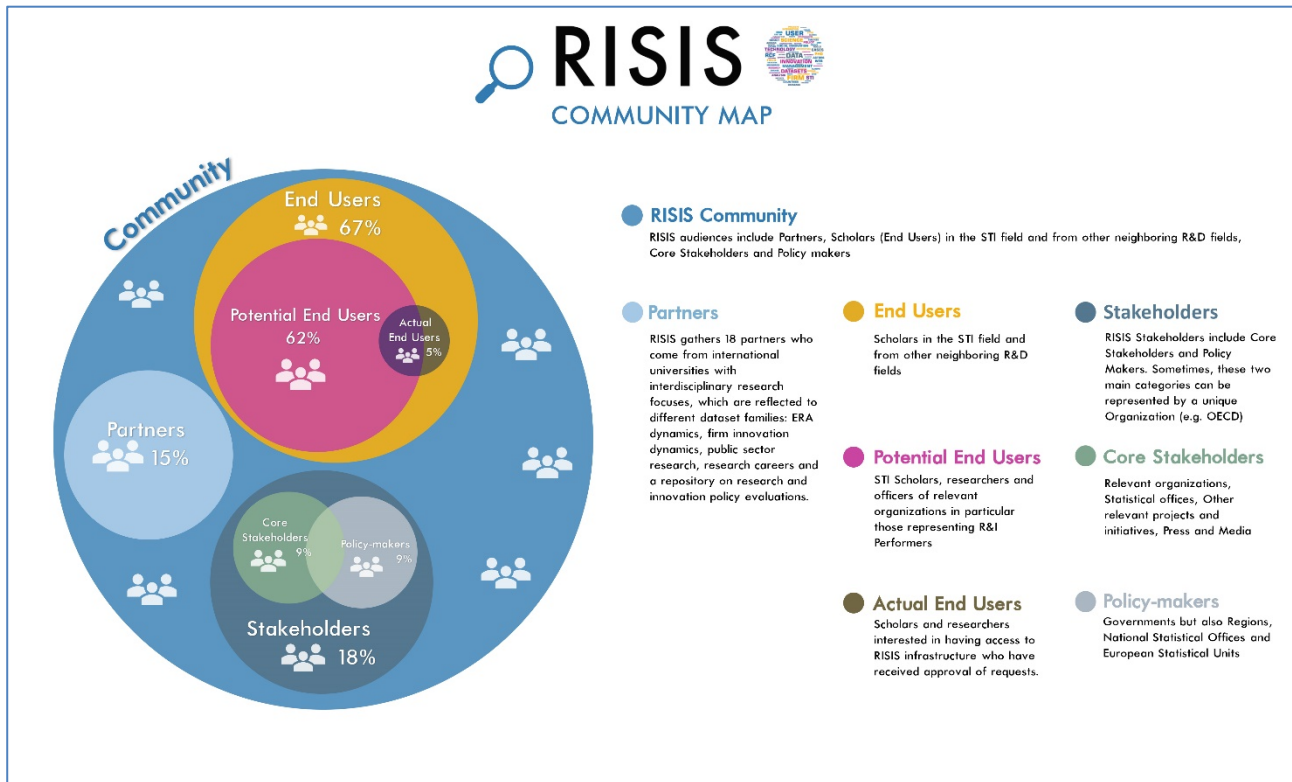
- i) RISIS partners (internal and external communication);
- ii) Scholars in the STI field (End Users) and from other neighboring R&D fields (researchers and officers of relevant organizations in particular those representing R&I Performers);
- iii) Core Stakeholders (Relevant organizations, Statistical offices, Other relevant projects and initiatives, Press and Media);
- iv) Policy makers (Governments but also Regions, National Statistical Offices and European Statistical Units).

To start, a snowball approach has been used from the existing contacts, by only targeting who have expressed an interest in RISIS1 or in RISIS services and tools.

RISIS participants of past conferences have been contacted and RISIS-tools newsletter subscribers, according to new GDPR agreement.

Currently (June 2019) a mailing list of about 400 contacts has been produced, which includes Partners, End Users, Core stakeholders and Policy makers.

The figure below shows RISIS actual community.



3.1 RISIS Partners

RISIS gathers 18 partners who come from international universities with interdisciplinary research focuses, which are reflected to different dataset families: ERA dynamics, firm innovation dynamics, public sector research, research careers and a repository on research and innovation policy evaluations.

The partners are CNR, UPEM, AIT, POLIMI, LEIDEN, USFD, FRAUNHOFER, USI, JOANNEUM, UOS, DZHW, STRATHCLYDE, SAPIENZA, NIFU, CSIC, SNI, TC CAS, ATHENA RC.

All partners are involved in **external communication and dissemination activities** in order to a) provide input for production of press releases, b) product local leaflets, (e.g. Training leaflets), according to RISIS leaflet templates, c) organise local meetings in respect to all other activities, d) present RISIS with session or posters at scientific conferences and events.

RISIS partners have been and will be involved in the realization of interviews, in order to explain focuses of their RISIS project tasks to its community.

They also must contribute by insert RISIS results in a dedicated Zenodo community space, writing pieces for RISIS newsletter, posting articles and news related to RISIS on their communication outputs (e.g. Organization website or social media); twitting or rewetting RISIS content; making available their networks contact to spread the newsletter.

Internal communication with RISIS partners aims at improving communication among partners, with the European Commission and to provide skills to the partners to collaborate in the external communication.

A Coordination Committee composed by other RISIS partners involved in supports the coordinated development of the different tasks, and the coordination with other WPs. It will meet physically once



per year, during the RISIS week, in order to present and discuss the work done and prepare the future actions, according to the Plan for dissemination and exploitation of results.

RISIS uses a permanently open call for proposing main activities (both on-line and physical courses) that are analysed by the Coordination Committee. The Committee also develops top-down events when considered necessary.

3.2 End users: scholars in STI and neighbouring R&D fields

Core RISIS end users are scholars from STI field and from scholars from other neighboring R&D fields. According to this WP2 task for M1-6 *Drafting the mailing list of end users and stakeholders to be addressed*, communication team have started to build an end-user mailing list, also in this case starting from existing contacts. WP2 team want to engage with researchers and analysts within stakeholder organizations, because they are often critical to the development of productive interactions between the academic community and stakeholders.

Three interaction modes have been selected: opening all RISIS training activities; engaging them with users in programming events, and developing participative events targeted to different users. About 50 end-users have participated to RISIS first awareness event planned for 2019, a panel in plenary session during Eu-SPRI 2019.

RISIS core datasets users have been reached initially, e.g. Cheetah and VICO end-users, but the mailing list will be enlarge with other new datasets users.

3.3 Core stakeholders and policy makers

According to this WP2 tasks for M1-6 *Stakeholders to be addressed - drafting the mailing list of end users and stakeholders to be addressed*, and *Mailing list of end users and relevant policy makers*, key stakeholders and organizations has been identified by drafting different mailing lists. To start, a snowball approach has been used from the existing contacts, by only targeting who have expressed an interest in RISIS1 or in RISIS services and tools.

Currently a mailing list includes **Relevant organizations, Statistical offices, Other relevant projects and initiatives, Press and Media.**

Relevant organizations

The variety of stakeholders and of their interests drives RISIS to develop a specific policy of targeted interactions privileging their collective associations (like EUA for universities).

In general, it has been privileged their European representation, such as Science Europe for PROs, EARTO for RTOS, TAFTIE for RFOs, or EUA for universities. Also other international organizations are central for RISIS aims, such as OECD (e.g. with SIPER or the use of semantic analysis for policy analysis).

This group of stakeholders will be enlarged globally through the development of policy briefs, EU level meeting and though the extensive use of RISIS communication instruments: the website, a widely circulated newsletter, blog, social media.

Policy makers

RISIS community is made of policymakers at different levels: European, national and regional, but also at city level and at organizational level, in universities, public research organizations (PROs), civil society organizations and even at firm or profession level. Most of them mobilize publicly available



indicators and it is thus an important activity for RISIS to produce policy briefs (see *Policy meetings* section) and to develop interaction channels with them.

RISIS will exploit its existing contacts to policy-makers (e.g. DG RT of European Commission) as well as explore new opportunities in order to gain influence on policy areas and specific policies relevant to the project's goals. RISIS will establish new contacts with national and European Ministries involved to R&D and STI policies, such as Ministries and Departments of Education, as well as other relevant Public Organizations potentially sensitive to the project aims. They will be engaged to jointly organize workshops and/or working sessions to present results and discuss their needs with a view of learning from these interactions about the future directions of infrastructure development.

Statistical offices

RISIS, as infrastructure, positions itself as complementing the important data gathering and indicator building role of statistical offices. They have played supportive roles in promoting quite a few of RISIS activities (e.g. Eurostat and national statistical offices for ETER). It is thus important that RISIS engage in a new step pushing for more in-depth exchanges and regular structured interactions discussing issues of data quality, evolution of existing datasets, development of new datasets and implications of new data gathering methodologies.

Other relevant projects and infrastructures

Research infrastructure present in other fields, e.g., often benefit greatly from communicating and sharing their experiences, which can lead to important synergies. The existing and growing network of other relevant projects, initiatives and infrastructures will be **exploited** through an effective communication channel to attract partners outside the core RISIS network.

A connection with them will be established through the use of RISIS social media (e.g. Twitter). This connection will be implemented with RISIS newsletter circulation, and EU level meetings.

Press and media

The press and media are linked to the above “general public” target group and represent an important stakeholder group as they play a key role in shaping public opinion and informing the public about new initiatives in main RISIS core dataset focused on: public funding instruments, ERA dynamics, public sector research, research careers, firm innovation dynamics. Press and media are also the channels through which the project communicate how EU funding contributes to tackling societal challenges.

To reach press and media, main instruments will be publication of RISIS main results. Also, the most relevant meetings (e.g. Policy Meetings), could be a powerful resource to engage press and media interests. Spreading RISIS news on social media as Twitter will help RISIS to engage targeted journalist. Communication team is developing a dedicated mailing list to involve directly press and media.

General public

RISIS focuses on development of new STI indicators with the aim at creating a distributed research infrastructure to support and advance science and innovation studies. Citizens and the general public represent a relevant stakeholder group for the project.

Main tools to engage general public still remain RISIS social media (Facebook, Twitter and You Tube channel). Awareness people not necessarily directly involved in the field will be raised, on the importance of open research infrastructures to develop new knowledge production.

4 TRAINING

Training provides basic and advanced knowledge about the content of the RISIS infrastructure and how to use it, the methodologies to exploit the datasets for research aimed to supply evidence relevant

for policy making. Activities build on the portfolio of training developed in RISIS1. RISIS 2 offer group training courses developing skills in using the RISIS datasets and platforms, and developing online tools, tutorials and courses to support users and stakeholders remotely. Materials and documents associated with training are freely available on the website at any time.

RISIS training activities are addressed to:

- scholars in the STI field (end users),
- scholars from other neighboring R&D fields (research users),
- Governments, Regions, National Statistical Offices and European Statistical Units, organizations dealing with research and innovation,
- researchers and officers of relevant organizations, in particular those representing R&I Performers and Research Funding Organizations
- stakeholders and civil society.

No fees to be paid by European Participants. Venue of the trainees for on sites courses (travel and accommodation) will be covered only in case of researchers, early researchers and PhDs coming from European countries (the perimeter adopted is the one of the ERA plus Israel). No costs are covered for people not involved in research activities (i.e. people from intermediaries or policy level).

In general, more than one infrastructure is expected to be involved in the courses.

Training activities on methods are allowed but must be contextualized and related to the datasets and platforms; courses must demonstrate the added value compared to existing courses, which means that there should be a focus on areas less covered in our field. For training activities partners should take into consideration existing linkages with other external activities such those related to ENID and EUSPRI training programmes.

RISIS member organizations are invited to submit proposals for Training on the job, Applied Courses on Datasets and Methodological Courses online/on site, Summer Schools.

4.1 Training activities and procedures

Tutorials: basic training for handling the datasets showing potentialities for analyses and research activities. This type of training is supposed to attract the attention of the different types of users toward RISIS.

Applied courses on datasets (Short course online/on site – duration the equivalent of 1 day): provides periodical on-line training about how to use the datasets for research aims based on model problems. These events so that they can be accessible for a wide community (including those outside the users' community);

On the job training: on-site training in places where there is a consistent community of users, which is developing research that would benefit from the use of the RISIS infrastructure but needs further assistance to learn how to use it for their specific research purposes;

Methodological courses (Short Course online/onsite – duration 2-3 days): dedicated to deepen specific methodologies mainly coming from activities developed within the usage cases of WP7. Methodological courses should enlarge the base of scholars using advanced quantitative methods;

Summer Schools (Summer Schools on site – duration 3-5 full days): schools are devoted to train people using combination of different datasets to address key problems/analyses that are particularly relevant for policy purposes. Within Schools we can also realize spaces of ‘creative training’ as laboratories, where the trainers shall stimulate the trainees to reflect on their data needs and research questions, through direct participative techniques;
Proposals are assessed on the base of the following criteria:

Applied Courses on Datasets and Methodological Courses online/on site

- Clarity of the proposal,
- Presence of a number of trainers with adequate skills,
- Precise identification of the targeted audience. Please consider that in principle scholars attending the courses are supposed to have basic knowledge about statistical tools. In case of courses based on advanced statistics, the audience shall have enough competences in order to benefit of the course.
- Facilities provided to the participants
- Relevance for the RISIS aims
- Clear added value of the course with respect to the existing ones
- Presence of updated documentation to be supplied to the students (the documentation for Applied Courses is supposed to be updated according to the changes of the datasets and platforms).

Summer Schools

- Clarity of the proposal,
- At least three RISIS organizations involved,
- Presence of a number of trainers with adequate skills,
- Focus on one specific training content to be exploited using the dataset(s) involved,
- Precise identification of the targeted audience. Please consider that in principle scholars attending the courses are supposed to have basic knowledge about statistical tools. In case of courses based on advanced statistics, the audience shall have enough competences in order to benefit of the course.
- Relevance for the RISIS aims
- Clear added value of the course with respect to the existing ones
- Reliable budget articulation
- Presence of updated documentation to be supplied to the students

The maximum support for training activities is as follows:

	<i>Preparation and delivery</i>	<i>Logistical costs (rooms, documentation, etc..)</i>	<i>Travel and subsistence</i>
Applied course online	1 PM	Online costs	Not applicable
Applied course on site	1 PM	1.500 euros	7.500 euros (500 euros per participants on average, up to 7.500 euros per course). Actual costs are reimbursed
Methodological course online	1 PM	Online costs	Not applicable

Methodological course on site	1 PM	1.500 euros	7.500 euros (500 euros per participants on average, up to 7.500 euros per course). Actual costs are reimbursed
Summer Schools	2 PM	3.000 euros	12.000 euros

Training procedures

Proposals can be submitted anytime but will be assessed four times per year (March, June, September, December). They must be submitted to: Risis.Training@ircres.cnr.it

IRCRES with the support of the WP2 Coordination Committee is in charge of preliminary assessment of proposals.

The final approval is in charge of the WP2 Coordination Committee.

The activities engaged in the considered period are the following:

- Coordination and management the process of submission and analysis of the RISIS training activities as well as the reporting activities of the RISIS partners which develops courses.
- IRCRES CNR has been in charge for managing the whole training in close cooperation with the Coordination Committee which support the whole activity.

The composition of the WP2 Coordination Committee is:

- Emanuela Reale - CNR
- Massimiliano Guerini - POLIMI
- Sybille Hinze - DZHW
- Patricia Laurens – IFRIS
- Benedetto Lepori - USI
- Thomas Schergell – AIT

IRCRES CNR through the Committee provided a preliminary assessment of the proposals, based on the criteria listed in the overall planning. WP2 Coordination Committee provided the final approval.

The WP2 Coordination Committee had one face-to-face meeting in order to take decisions about promotion of the training activities, accompanying actions for people submitting ideas, and assessment of the proposals submitted. Assessment of the courses, and reporting activities has also been discussed. After this first meeting the other interactions were carried out using Skype or email in order to speed up the process. It was decided that physical meetings can be organized during the RISIS week, which takes place every year in January.

The management activity developed included:

- Preparing the formats for the training activities (proposals, applications and reporting)
- Circulation of the training offers
- Managing the selection process of the courses
- Collecting the short Final Report on each course
- Elaborate an online questionnaire for assessing the courses
- Repository of participants and materials
- Summary for the annual RISIS week

Website

A space on the RISIS website is dedicated to the Training Activities, with all the information available. Furthermore, information has been also circulated by mail.

More specifically the website provides:

- Call permanently open with the indication of the deadlines for submitting (text of the call downloadable)
- Formats for RISIS partners for presenting proposals of training courses (downloadable Formats of the three types of courses)
- List of courses open with information on aims, contents, deadline for application, etc. (downloadable documents for people that want to apply)
- List of courses done with information on aims, contents, materials, reporting and assessment
- Questionnaire to be filled by all the people participating to the Training courses
- Format for reporting activities at the end of the courses.

4.2 Annual planning of training

WHAT (task)	ABOUT (description)	WHEN (deadline)
Online course	Setting conditions and guidelines	M 1-6 (done)
	One course/webinar for all the RISIS partners on the OA advantages and functioning	M 7-12 (to be defined)
Templates	Templates for training proposals reporting and materials on the web	M 1-6 (done)
Web page on training	Section of the web page for training materials	M 1-6 (done)
	Connection with OA (Zenodo)	M 1-6 (done)
Tutorials	Partners in charge of the core dataset start preparing tutorials	M 1-6 (done)
	Tutorials on core datasets ready and online with the related documentation (Technical Reports)	M 7-12 (ongoing)
Call for training	The call for training opens on M3. The call is permanently open; proposals are assessed four times per year	M 1-6 (done)
	6 courses (online or on site) developed by the end of M12	M 7-12 (not achieved)
Master and PhD involvement	Setting actions toward formal involvement of Master and PhD courses	M 7-12 (not achieved)

The prospect below presents the RISIS2 courses developed/planned in the period 01/01/2019 – 30/06/2019.

RISIS2 courses (period 01/01/2019 – 30/06/2019)

Type	Title	Venue	Date
Summer School	Data Science for Studying Science, Technology and Innovation	University of Strathclyde Business School, Glasgow	24-28/06/2019
Methodological Course	Application of Latent Class Modelling to research policy and higher education studies	Università della Svizzera italiana, Lugano	9-10/09/2019

5 DISSEMINATION ACTIVITIES³

Dissemination address targeted groups of users to improve the understanding of what RISIS can offer to their research effort (learning objective). Dissemination is also devoted to produce a change in the research practices of the existing STI community (transformative objective). Furthermore, dissemination shall develop productive interactions between researchers in the field, **scholars** from neighboring fields, **policy makers**, practitioners, and researchers working in **stakeholders' organizations**.

Dissemination activities shall create occasions for discussing with a participative approach, relevant issues on STI policies, and the RISIS contribution to new developments and methodologies.

All the activities benefit from the integration within OpenAIRE, which will further reinforce the possibility of reaching broad audiences of scholars and stakeholders. Furthermore, dissemination is strongly connected with the *Methodological Workshops* and all the activities under communication.

According to the task (M1-6) *General invitation to all the partners will be circulated for organizing awareness rising events, webinars and policy briefs*, Communication team through periodical email has invited partners to organize and promote events.

A brief description of the dissemination events and the first set of those organized and planned for 2019 is presented in the next section.

5.1 Events

According to the task (M1-6) *Conferences to be addressed on a regular basis and other interesting conference: enlarge the number of conferences addressed*, a brief description of each type of event and activities realized or planned during the first year of project.

Attending key conferences with papers/posters based on RISIS results or activities

Support provided with materials and packaging. Dissemination team send periodically advices of forthcoming conferences to the partners (paper presented should be put in the web repository of RISIS results -monitoring of presence in conferences also though OpenAIRE - OA).

Papers and posters based on RISIS have been presented at Eu-SPRI Conference 2019, and others will be presented at ISSI Conference 2019.

Awareness rising events

In key conference they are specific events (panels, round tables, etc.) directed to targeted audiences involving users from STI community, users from neighbouring R&D communities and stakeholders' organizations.

³ Part of this section is developed on the base of DOW 2018; WP2 Activity Plan 2018.



Their aim is to discuss items of interest, such as RISIS research outcomes, return experiences of users, planned developments of the research infrastructures, key research questions and ways to address them, role of the RISIS infrastructure for the goals of European integration.

The first awareness raising event “RISIS AND KNOWMAK MEET USERS” was organised during Eu-SPRI Conference 2019.

The next event planned will be an interactive round table during ESOF Conference on September 2020. It is also planned to have one participative event during the Eu-SPRI Conference in Utrecht planned in the first week of June 2020.

Policy meetings

They are a kind of *awareness rising events* specially organized to involve policy makers on specific issues, also adopting a new approach to aggregated data circulation, in particular towards policy analysts and policymakers. These events are also devoted to shape other communications tools with a learning attitude: what is the novelty and what type of use is expected (learning from the audience and observing how they understand what RISIS must do).

According to the task (M7-12) “Organize the first seminar in Brussels, RISIS Policy meetings will take in place in Brussels about three/four times a year, and the first two are planned in October the 24th and December the 19th 2019.

Sponsorship

RISIS considers important to contribute to Conferences in the field. As a rule, RISIS can contribute to the conferences with two rates depending on how relevant the conference for the project is (beyond the number of people attending, what is relevant is how the Conference is at the core of the RISIS developments) and the type of involvement that the Conference rules allow to the sponsors.

During 2019 RISIS has sponsored 2 core conference, Eu-SPRI Conference 2019, and the ISSI 2019 Conference hosting one ENID Track.

Webinars

Seminars to discuss advancements produced within RISIS with a wide audience or to circulate information about tools (e.g. OA). Webinars deals with RISIS services (semantic analysis, ontology building, geographical analysis, visualization), and need to develop transversal efforts between RISIS groups.

Until July 2019 WP2 team presents the platform (ADOBE CONNETCT) which will host the webinars; guidelines to organize webinars will be also developed. The partners will be invited to propose webinars by December 2019.

Dissemination Events 2019/2020

Name/when	Type	Brief Description	STATUS
OpenAIRE Workshop GHENT – May 2019	<i>Attending key conferences</i>	Poster presentation	realized
Eu-SPRI Conference ROME June 2019	<i>Awareness rising events</i>	RISIS panel	realized
	<i>Sponsorship</i>	Logo, leaflets and poster of RISIS	
	<i>Attending key conferences</i>	Paper and poster presentations	
ISSI Conference ROME September 2019	<i>Attending key conferences</i>	Paper and poster presentations	realized
	<i>Sponsorship</i>	Logo, leaflets and poster of RISIS	

RISIS Policy meeting Brussels October 2019	<i>Awareness rising events</i>	CHEETAH dataset presentation	planned
RISIS Policy meeting Brussels December 2019	<i>Awareness rising events</i>	KNOWMAK TOOL presentation	planned
ESOF Conference Trieste September 2020	<i>Awareness rising events</i>	RISIS Interactive round table	proposal sent

5.2 Communication and dissemination products

RISIS Policy Brief Series aims at disseminating key results coming from RISIS2 to improve the use of data for evidence-based policy making. The outcomes should be presented through short documents pointing out the main policy issues at stake, demonstrating the contribution provided by RISIS, and what new avenues for research are now open.

Policy briefs could be produced by different WPs and are coordinated by WP2. They will be circulated around the broad community of scholars, stakeholders and policy makers through the RISIS communication channels, including the website for downloading.

Partners of RISIS2 Consortium responsible for core datasets and new datasets are involved to contribute to the Series; in particular Partners involved in the RISIS Policy Meetings in Brussels shall prepare a policy brief in advance.

According to the task “(M1-6) *Templates for policy briefs and instructions on how to prepare them*, the invitation has been sent on March 2019 with templates and instructions. The first two Policy Brief will be disseminated on October 2019 and December 2019 and will be based on RISIS datasets presented during RISIS Policy Meetings in Brussel.

Posters and Leaflets are dissemination materials periodically produced by communication team to advertise about contents and development of RISIS activities and to support the dissemination during key Conference and other events in which RISIS is involved as sponsor.

The first batch of materials realized has been uploaded on the website in *Leaflets and Posters* section and is about:

- general presentation of the project (1 brochure and 1 poster)
- presentation of datasets and services (1 brochure and 1 poster)
- Exploring RISIS resources (1 leaflet and 1 visit card with Qr Code)

These materials also have been and will be presented and distributed during OpenAIRE Workshop at Ghent, Eu-SPRI Conference 2019 and during ISSI Conference 2019.

5.3 RISIS outputs: the ZENODO Community space

The RISIS-Zenodo community space is used as repository for RISIS research activities and outcomes.

It is directly embedded in OpenAIRE and has efficient search functionalities enabling to browse and download specific document types, such as training materials, conference presentations, policy briefs, publications, etc., and to search for them e.g. in relation to RISIS focus on the triplet organizations, geography and themes.

The RISIS-Zenodo space fulfills two main purposes:



1) Repository for RISIS activities and research outcomes from partners in the RISIS project, such as documentations of datasets, training materials, but also conference presentations and working papers, media (e.g. videos), etc.

2) Repository for research outcomes from RISIS users, e.g. in the form of conference presentations, working papers, publications, new datasets, visualizations, etc. Note that this is a main principle of Access in relation to RISIS inscription to Open Science.

In the RISIS Code of Conduct, it is accordingly noted that all users are obliged to upload their outcomes in that space.

During the first sixth months, according to the task (M1-6) on *first batch of material on intranet*, partners have uploaded only 22 materials from RISIS activities, and despite the small number of documents shared, the views (195 unique) and download (251 unique) demonstrate interest towards these themes, and the need of improving the upload of RISIS achievements and results.

Communication team will try to improve through different direct and indirect tools and channels the awareness of partners on this issue.

5.4 Annual planning of dissemination activities

WHAT (task)	ABOUT (description)	WHEN (deadline)
Conferences to be addressed	EU-SPRI, ENID-ISSI, Atlanta, CHER, ESOF, EGOS, ECPR	M 1-6 (done)
Stakeholders/organizations engagement	drafting the mailing list to be addressed	M 1-6 (done) continuous updateing
Policy brief	Templates and instructions on how to prepare them	M 1-6 (done)
	Circulate the first set of policy briefs	M 7-12 (2 policy briefs planned)
Webinars	Selection of the infrastructure (software) and training to use it	M 1-6 (done)
	Identify partners preparing webinars	M 7-12 (1 proposal from USI)
Awareness events for the first year	1 event at the Eu-SPRI Conference	M 1-6 (done)
Policy meetings in Brussels	Under organization	M 7-12 (2 events planned)

6 COMMUNICATION ACTIVITIES⁴

Communication is running in tandem with the relevant core conferences engagement for dissemination purposes, policy briefs and awareness raising events.

Specific communication actions targeting researchers and analysts from stakeholders' organizations are included within this task.

⁴ Part of this section is developed on the base of DOW 2018; WP2 Activity Plan 2018.

6.1 Branding and logo

Branding concerns the promotion of a broad use of the RISIS logo in order to refer all activities and outcomes deriving from the use of the datasets and other tools to the whole project. Communication team has shared main rules to Partner to harmonize dissemination contents and activities ad to enlarge RISIS visibility as brand.

Management team has restyled RISIS logo, in continuity with the holder, re-conceptualizing key words of the project.

The main rules are the following:

- Use of the official RISIS logo
- Use of the official font **Tw Cen MT** (supported by Microsoft) for all documents and materials derived from RISIS
- Use of RISIS slides template for all presentations of work derived from RISIS
- Use of Poster and leaflet templates provided by RISIS when Partners organize an event
- Indication of 'RISIS' before the name of the datasets and other facilities developed within the project
- The quotation of RISIS as source of data shared
- The mention of RISIS in the acknowledgment of paper published (also preliminary versions such as working papers) as follow:

«This work was supported by RISIS-funded by the European Union's Horizon2020 Research and innovation programme under grant number 824091»

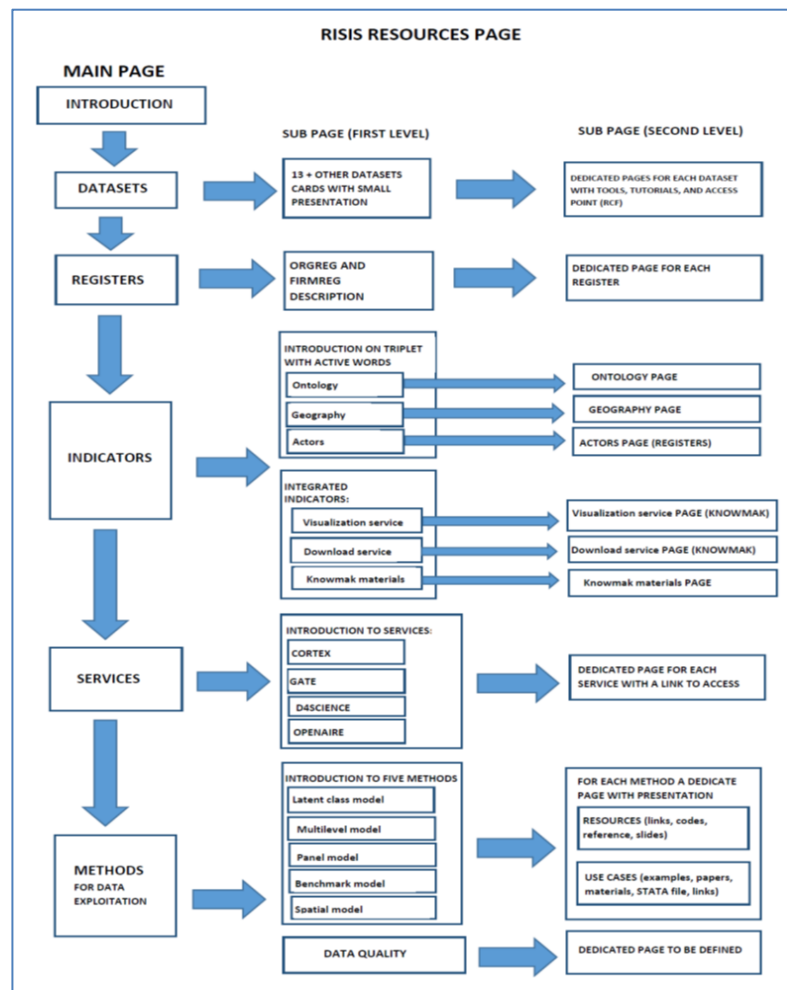
6.2 Website

The website is the most important mean to promote the dissemination of RISIS activities as a tool for understanding what RISIS can offer, how you can join the community, what advantages researchers and other users can have for their research work, and to access results and open resources produced; materials such as posters, printed promotion materials, templates, videos and story-telling, are also very important to this aim.

According to the task (M1-6) *On the opening of a new website version*, during the first six months all website contents have been completely revised and updated, creating new sections strictly dedicated to dissemination and communication activities, and reinforcing the visibility of news and incoming events.

A dedicated page on news and insights named **Talk about RISIS** has been created with a direct access from main menu (High visibility). The design is under revision and update. Dedicated sections for blog, video, materials and publications are in development, with also a dedicated workspace for working documents and internal communication. A **Sitemap**, and a **Utilities section** has been settled up with useful guidelines and tools for Partners and Users.

During the first year will be set a new section on **RISIS RESOURCES** that aim at presenting all RISIS activities and tools, it will be the core page of the website.



A next step will be moving to more dynamic and interactive structure of the site, developing a dedicated workspace for partners and a chat section to engage and support users.

Web-based exploration activities will be developed to be aware of sites where dissemination of RISIS can produce an impact attracting new users.

6.3 Press and news

Videos: Videos are a powerful tool to disseminate RISIS general overview, as its main objectives and development. RISIS video production has been divided in two categories: graphic and report videos. Graphic videos are useful to explain the most technical aspects of RISIS infrastructure, e.g. the structure and the contents of RISIS datasets. Report videos are often enriched with partner's interviews and are related to RISIS main conferences and events.

For now, two graphic videos have been published (a clip for Social media channels and a short video that is called *"Pills of RISIS"*) and one report video about RISIS panel session at Eu-SPRI conference (first RISIS awareness event). The video of the full panel session is in publication.

Other two report videos have been created (currently in publication), one on RISIS resources and services and one on RISIS general overview.

For next months, other graphic video on the RISIS core dataset structures are planned and other RISIS partner interviews (e.g. in occasion of Brussels Policy Meetings).

Press review: press releases will be generated by RISIS communication group in relation to publication of RISIS main results. Press releases will be targeted at key players, (e.g. relevant national/international authority departments, national and international media) and published on the Press Release section of the website. Communication team will actively follow up the releases to assure maximum coverage. Partnerships will collaborate with selected newspapers in the partner cities to assure continuous information coverage.

Blog news: everyday announcements of news related to RISIS development (short news for quick reading on achievements, publications, forthcoming activities, etc. and links where one can get more information). The blog page has been opened, according to task (M1-6), with news and videos about the first six months activity of the project on June 2019.

Newsletter: a periodical (every six month) update of ongoing activities and achievements pre-announced using the Blog. News are prepared as short papers (100-200 words) with a picture/design.

According to the task (M1-6) the invitation to join the Newsletter has been sent on April 2019 and the first Newsletter has been shared on June (with a dedicated page on website to download the pdf version and a submitting form for receiving it by email).

6.4 Social media

One of main goal of communication activity is the intensive use of Twitter, Facebook and use of YouTube for a wide distribution of videos. Coming soon a new ResearchGate profile to enlarge the network of stakeholders.

YouTube, Twitter and Facebook will remain the most used channels to promote project updates and results, and a RISIS profile for each of them has been created. Social media, especially Facebook and YouTube, have spread across the whole society as prominent communication channels. To extend the project target audience (specially to involve the great public and not only sectorial experts) RISIS is integrating these media tools strategically in the communication activities.

In March 2019 WP2 team have started to share content about the project, its general view, its aims and plans. After, new contents have been created about the structure of RISIS research infrastructure and its core datasets. The reach of RISIS posts has been implemented with photos and external links. Producing short clips on network's partners experience and putting them on a public video channel, (e.g. YouTube) serves several audiences and even offers a feedback channel for the project. Partners' events and RISIS conferences and training activities are the main reference for RISIS events news, and for the latter case, specific graphic cards have been created for different kind of events (e.g. Summer School, Methodological courses...).

Relevant post of RISIS partners and stakeholders are re-tweeted constantly, also announcing updates and direct their messages to the attention of stakeholders by use of hashtags (example #H2020) and handles (examples: @Eu_H2020).

During the first month of Twitter intensive use, RISIS have increased its followers from February with a share growth of 33%, and number of tweets with a share growth of 46%.

The first batch of data on the growth of Facebook page will be presented at the end of 2019 because it has been opened on February 2019. Currently the page has 219 likes, on average of 160 page-views and on average of 209 page-users engaged from March to May 2019.

6.5 Annual planning of communication activities

WHAT (task)	ABOUT (description)	WHEN (deadline)
Branding	New logo and rules for branding	M 1-6 (done)
	Harmonization of graphic (materials)	M 1-6 (done)
	Harmonization of graphic (website)	M 7-12 (ongoing)
Website	Opening new version	M 1-6 (done)
	Blog section (structure and rules for posting)	M 1-6
	Intranet workspace	M 7-12 (critical)
	Web-based exploration activities	M 7-12 (ongoing)
	Press release section and press contacts	M 7-12 (ongoing)
	"Key figures" section	M 7-12 (ongoing)
Newsletter	Design the structure of the Newsletter	M 1-6 (done)
	Newsletter announcing RISIS 2	M 1-6 (done)
	First newsletter	M 1-6 (done)
	Second newsletter	M 7-12 (ongoing)
RISIS materials	First batch of RISIS presentation videos	M 1-6 (done)
	First batch of RISIS leaflets	M 1-6 (done)
	First materials in ZENODO	M 1-6 (done)
	First batch of video on RISIS objectives and demonstrators based on dataset exploitation	M 7-12 (done)

7 EVALUATION

Communication Team monitor periodically users' views and needs through on-line feedbacks after activities developed (access, workshops, conferences special sessions, communication events).

7.1 Activities indicators⁵

Training indicators

Indicator	Target M6	Target M18	Target M24	Total
N° courses	1	6	14	31 (34)
Trainees	20	120	280	500
Download of tutorials	not targeted	300	500	1,000
PhD and Master addressed	not targeted	5	10	20

Source: WP2 Activity Plan 2018. Note: Not targeted activities will start after M6.

Dissemination indicators

Indicator	Target M6	Target M18	Target M24	Total
Policy brief and download	not targeted	3 (300)	6 (600)	11 (1000)
Awareness events	1	3	4	8
Users and stakeholders mobilized	not targeted	90	150	240
Webinars and participants	not targeted	4	8	16 (210)
Stakeholders researchers involved	10	30	60	100

Source: WP2 Activity Plan 2018. Note: Not targeted activities will start after M6.

Communication indicators

Indicator	Target M6	Target M18	Target M24	Total
Visits to website	1168	+ 10%	+ 10%	+ 20%
Circulation of Newsletter	320 reached/107 readings	+ 10%	+ 10%	+ 20%
RISIS results downloaded	195 (from Zenodo)	+ 5%	+ 5%	+ 10%
PRESS (1 int. article per year)	not targeted	1	2	6

Source: WP2 Activity Plan 2018. Note: Not targeted activities will start after M6.

Indicators on Social media activities are reported under section 6.3

⁵ Part of this paragraph is developed on the base of DOW 2018; WP2 Activity Plan 2018.



7.2 Community Engagement Chart

RISIS takes into account the broader impact of its activities and on its core community. Communication team periodically collect viewpoints and insights of RISIS most important stakeholders and actively address their perspectives and needs in order to improve dissemination activities, to strengthen RISIS as one of the main infrastructures in the field of innovation to be referred for research domains.

Relationships with stakeholders are establishing through consultation and dialogue, with a key focus on the following stakeholder groups: RISIS users, RISIS partners, policy makers, core organizations etc. A detailed overview of the stakeholder groups has been developed in the first part of this plan. The present charter outlines RISIS approach to stakeholder engagement and sets a few principles to ensure contacts with them. It should allow to develop strong relationships with stakeholders and to enlarge the network of relationships.

By seeking stakeholders' and end users' perspectives, we are able to:

- Manage RISIS reputation as central infrastructure in the field of innovation
- Establish dedicated tools that meet the community needs
- Sharpen RISIS research strategy
- Better understand the institutional context and policy framework
- Continuously address research issues and risks
- Identify emerging communicative opportunities and channels
- Explore partnership opportunities
- Seek support and establish cooperation with other networks and organizations

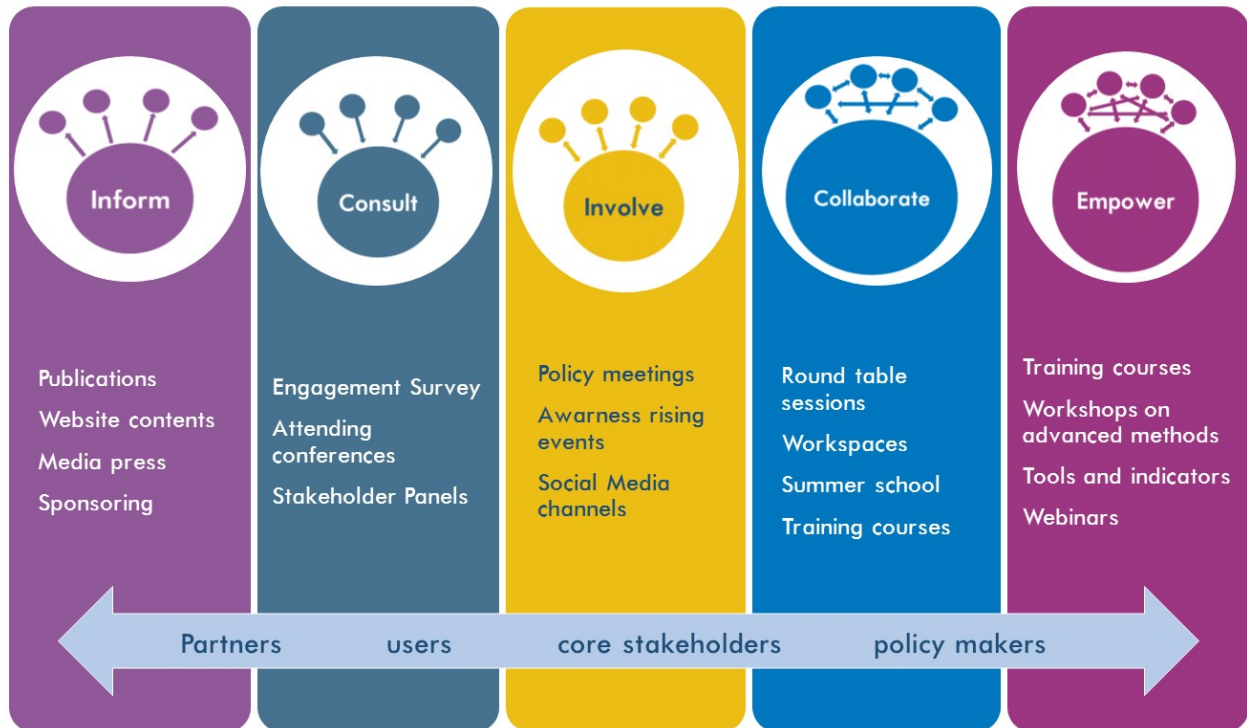
In return, stakeholders and end users do also benefit from a transparent line of communication with us to:

- Understand RISIS research strategy
- Understand the context in which RISIS operate
- Become familiar with the RISIS position on policies and regulations

We use multiple platforms to engage with end users, stakeholders and policy makers, to share RISIS viewpoints and to gather internal/external insights. The appropriate level of engagement is based on the research objectives, the scope of the engagement and the type of stakeholders involved.

The CHART of the most important engagement activities is given in the next page.

RISIS ENGAGEMENT CHART



7.3 Key-engagement Indicators

The table on the next page shows main engagements indicators following European Commission guidelines on Communication and dissemination activities and monitoring⁶, and according to main impact indicators presented in RISIS2 DOW (2018). The last column will be filled in the periodical reporting of WP2 activities.

⁶ https://www.iprhelpdesk.eu/sites/default/files/EU-IPR-Brochure-Boosting-Impact-C-D-E_0.pdf;
http://ec.europa.eu/research/participants/data/ref/h2020/other/gm/h2020-guide-comm_en.pdf;
http://ec.europa.eu/research/participants/data/ref/h2020/other/grants_manual/amga/soc-med-guide_en.pdf

Tool	Indicator	Results (6 month - baseline)	% of growth from baseline
Events	N. events organized	3	
	N. participants at events	90	
	N. papers presented at Conferences	n.a.	
Publications and materials	N. papers published	n.a.	
	N. presentations at events	n.a.	
	N. mailing lists	3	
	N. contacts of mailing lists	360	
	N. materials distributed at events	300	
	N. materials uploaded in Zenodo	22	
	N. materials downloaded in Zenodo	195	
Relations with the public	Number of visitors of Zenodo	n.a.	
	N. presentations to stakeholders	1	
	N. presentations to policy makers	not targeted*	
Website	N. webinars	not targeted*	
	N. visits	1168	
	N. unique visitors	1136	
	N. Newsletters downloaded or viewed	124	
	N. videos visualizations	66	
	N. documents uploaded	n.a.	
	N. documents downloaded	n.a.	
Social Media	N. policy brief downloaded	not targeted*	
	N. click on social media link	n.a.	
	N. tweets sent	292	
	N. like on Twitter	105	
	Total number of followers on Twitter	358	
	N. shared posts on Facebook	60	
	N. like on Facebook page	219	
Media relations	N. YouTube videos uploaded	6	
	N. YouTube videos visualized	251	
	N. journalists attending events organized by RISIS	not targeted*	
	N. press releases, memos published on RISIS	not targeted*	
	N. articles, forewords and interviews written on RISIS	not targeted*	
Audiovisual production	N. policy events organized	not targeted*	
	N. seminars	1	
	N. video published	6	
Internal communication	N. pictures published	28	
	N. event cards published	5	
Internal communication	N. visits to workspace	not targeted*	
	N. updates, news, events, shared on workspace	not targeted*	

*Date related on activities which will start after M6.