Persistent Personal Data Vaults Empowering a Secure and Privacy Preserving Data Storage, Analysis, Sharing and Monetisation Platform

D8.1
Dissemination, Communication and Stakeholder Engagement Plan

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Abstract	An integrated analysis of the Dissemination Plan, the Communication Plan and the Stakeholder Engagement Strategy to be followed within DataVaults, combined with a framework of strategic communication guidelines, project branding and identity, specific performance metrics and KPIs, as well as adherence to relevant renowned methodologies.

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Executive Summary

This deliverable D8.1 exemplifies the threefold integrated plans prepared by the DataVaults WP8 team, namely the dissemination plan, the communication plan and the community engagement strategy. Furthermore, it proceeds with the first relevant activities completion such as the integrated branding and identity strategy, the logo and accompanying visuals, the artworks and base concepts. It defines the main guidelines and the means for DataVaults' relevant extrovert strategies and how these will be implemented.

A set of specific impact metrics and KPIs are introduced as well as an online dissemination tracker. These tools will assist the consortium to establish accurate reporting, a holistic follow-up procedure, and an effective means for potential revisions, mitigation of deviations and risks. Adherence to norms and guidelines is also addressed. An analytic 3-phase plan is presented in tandem with the KPIs, and is broken down in mechanisms, channels and activities.

Despite the fact that this deliverable is submitted early (in M2) and two more revisions of a more mature plan combined with progress reporting are expected in M18 (D8.3) and M36 (D8.4), we can claim that several aspects of the strategy are already considered quite mature and implementation can promptly begin. Moreover, a first stakeholder identification and taxonomy are introduced, and this is combined with the presentation of 2 specific stakeholder methodologies that will be employed until M18.

In short, the reader should be able to decipher the actions, the targets, the timeline and the strategy that DataVaults WP8 will follow concerning dissemination, communication, channels used, tools employed, and the overall community building and stakeholder engagement effort. The scope obviously remains to maximise the potential impact of the project, create a critical mass of participants within the DataVaults community and build fruitful liaisons with relevant initiatives, projects, clusters, organisations, as well as the industry itself, being a first step towards exploitation and route to market potential.

This deliverable will be complemented with D8.2, (due in M3) which among others will instantiate all the digital channels of DataVaults (i.e. The web portal, the social media channels, the blog etc). These will serve as the basic medium of implementation for the promotional strategies presented here.

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Terms and Abbreviations

BSCW	"Basic Support for Cooperative Work" (The collaborative workspace web-based software, developed by the Fraunhofer Society, used in DataVaults)
EC	European Commission
CA	Consortium Agreement
GA	Grant Agreement
Mx	Month (where x defines a project month e.g. M10)
MSx	project Milestone (where x defines a project milestone number e.g. MS3)
NPD	New Product Development
UGC	User Generated Content
USP	Unique Selling Proposition
WPx	Work Package
Tx.x	Task (as per Grant Agreement)

1 INTRODUCTION

1.1 DOCUMENT STRUCTURE

The current document is structured along these lines:

Section 2, following this introductory section 1, defines Strategic Guidelines on Engagement, Messages Conveyed, primary and secondary messaging as well as the project's differentiation factors

Section 3 is devoted to the project's branding, identity, logo, visuals, artboard and concept base

Section 4 presents the various aspects of dissemination, communication, standardisation and also affiliations envisioned towards a wider community adoption

Section 5 illustrates the 3-phase plans, and introduces the specific KPIs for a measurable impact of the project, together with the online dissemination tracker and the procedure of follow-up and continuous revision to avoid deviations and risks.

1.2 SCOPE AND LINK WITH OTHER DELIVERABLES AND TASKS

This deliverable D8.1 sets the overall plan upon which dissemination, communication, standardisation and community engagement activities will rely. These will be recursively reported in D8.3 (interim version) and D8.4 (final version). Concurrently, the digital channels of DataVaults (i.e. Website, Social Media and Blog) are being initiated and will be reported within D8.2 (in M3). Part of the dissemination content and material created within WP8 will formulate the basis for the DataVaults Marketing Pack which belongs to WP7 (D7.3) as these will be employed at route-to-market and product launch stages (M28). By definition WP7 (exploitation) and WP8 (dissemination) work in close collaboration. Several content contributions are expected by all technical work-packages, while the overall events participation (internal and external) as well as scientific publications are being managed by the dissemination/communication team yet the content is created by all consortium partners. The general guidelines set forth in the present deliverable concerning messages conveyed, value proposition, communication best practices etc. are indirectly applicable to all partners and WPs when engaging in extrovert activities.

2 DISSEMINATION, COMMUNICATION AND ENGAGEMENT STRATEGIC GUIDELINES

2.1 METHODOLOGIES, ADHERENCE AND COMPLIANCE TO GUIDELINES

The present document as well as the overall communication and dissemination strategy of DataVaults, takes into account and adheres to:

1) the relevant EC and H2020 Guidelines such as
    a. H2020 Communicating EU research and innovation guidance for project participants [1]
    b. Social media guide for EU funded R&I projects (H2020 Guidance) [2]
    c. HORIZON 2020 Communication Dissemination and Outreach (2018) [3]
    d. H2020 New Social Media Guidelines for Beneficiaries [4]
2) The "PEDR H2020" (Guide Plan for Dissemination and Exploitation) [5,6]
3) The Relevant Guidelines of IPRHElpdesk.eu and H2020 Common Support Centre/J5 and the CEB (Common Exploitation Booster) [7-20]

Furthermore, based on the experience of the DataVault's dissemination team, both in the corporate world as well as in a large portfolio of Research and Development EU funded projects, we combine our strategy on extrovert activities with world renowned best practices, and we expand our methods of communication as well as our tactical approach on digital channels with:

1) Strategies for Online Communities (ex [35])
2) An Integrated Approach to Online Presence and Social Media (ex. [37-42] et al.)
3) Relationship between online engagement and advertising effectiveness [32], etc.

Presentation of the overall plan breakdown, as well as Metrics, KPIs and other evaluation methods of our strategy are analysed in the relevant chapters below.

2.2 ENGAGEMENT STRATEGIC GUIDELINES

The following general briefing applies not only to the WP8 dissemination-communication team but also to all consortium members either when producing content or when engaging in two-way dissemination and communication actions.

2.2.1 Engagement Forms

When building critical mass communities, and especially when delivering multi-sided platforms as in the case of DataVaults, engagement can take the form of:

1) Captured members and registrants in the project portal and in the future in the Brokerage Platform
2) Followers of social media channels and /or disseminators (hence advocates)
3) Retention of previously captured members (as one-time engagement does not guarantee long term retention)
4) Physical participation in DataVaults events, hackathons, workshops, and other dissemination actions

5) Participatory contribution in all digital channels (as UGC user Generated Content must be encouraged and leveraged)
6) Active synergies, joint activities and collaborations with affiliated projects, clusters and initiatives
7) Active Industry/Corporate stakeholder capturing (the most coveted target of exploitation strategies)
8) Or (in the simplest case) just raise awareness to diverse stakeholders as the first step towards the marketing/engagement funnel (see below)

In any case, DataVaults should encourage and enhance impulsive trials when possible at later platform development stages, beyond plain presentation.

2.2.2 The Community Engagement Funnel

Using the well-known marketing terms of the "B2B funnel" and "Customer Journey" methods [43,44,45] (which need no formal introduction as they are de-facto standards for many decades) we can depict the following logical steps that we have adapted specifically for community engagement within DataVaults.

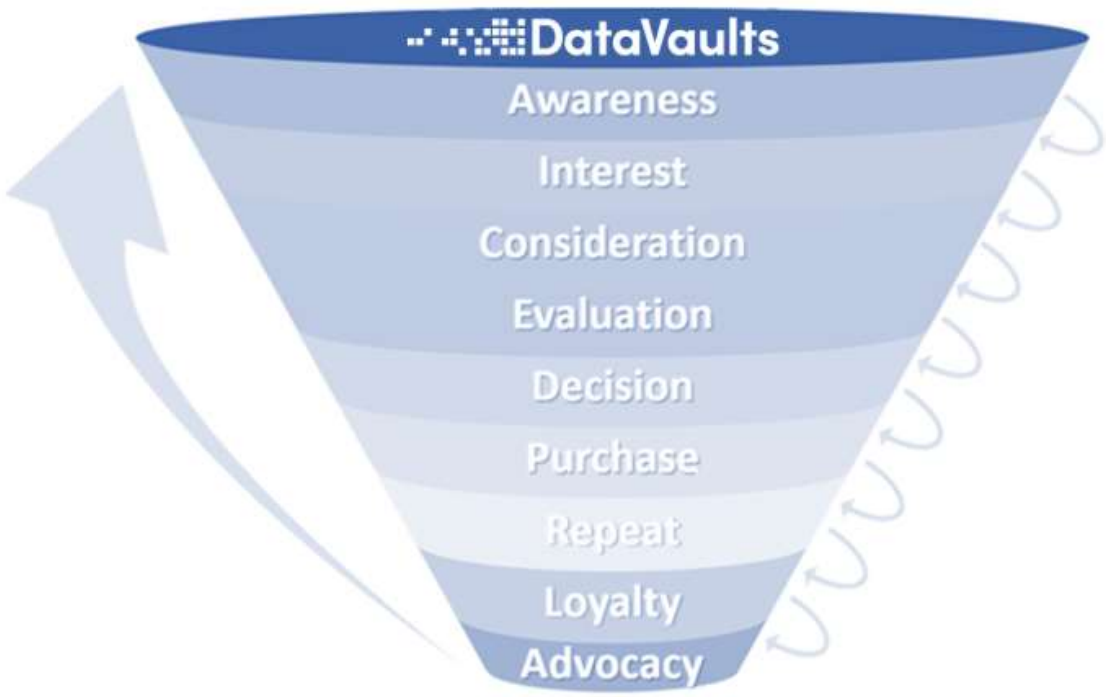

Figure 1: DataVaults Engagement Funnel (adapted)

Note 1: Recurring visits and loyalty / advocacy are by far the most challenging to achieve in the long term. These require constant added value content additions among other factors.

Note 2: Purchase in the context of DataVaults refers to the Data Brokerage activities of the relevant Tasks in WP3 and WP7, and somewhat belong to the exploitation efforts rather than dissemination activities which only "instigates" such ideas.

2.2.3 Other Engagement Aspects

It is rather obvious that stakeholder capturing and conversion into active members, not to mention recurring and subscribed paying users in the future (exploitation phase), requires 3 simple pillars:

1) Added Value Offerings that have a distinguishing benefit to the user. No one will be retained for social reasons.
2) Sense of safety, dependability and respect to privacy and regulations. No one engages to online communities they do not "trust" no matter what the promised benefit may be.
3) Sense of "belonging" and encompassing in the ecosystem. Lively communities, recurring visitors and retained members need to be "addicted" and this is a non-quantitative, rather subconscious and sentimental need (as per Value Proposition terminology). These are not governed through rational decisions and comparisons.

2.2.4 Web Portal and Social Media Channel Notes on Engagement

In the digital community world where marketplaces, portals and participatory platforms strive for share, everyone tries to create retention and conversion schemes. Yet the truth remains that equity building comes mainly through existing user advocacy and "word of mouth".

According to studies [29,35,40,41] active, re-visiting e-community members account for more 80% of its traffic while one-off circumstantial visitors are less than 20%. Also 75% of portal visitors judge credibility by UX/UI and aesthetics criteria, and 88% are less likely to return after a bad experience.

2.3 DataVaults Differentiation and Anchor Branding in a Cluttered Market Space

Distinguishing the project and its outcomes from the cluttered similar solution space is pivotal, since there is an uncountable number of portals, ecosystems and marketplaces of some sort dealing with Privacy, Security, Trusted Data, Big Data, Artificial Intelligence and Cloud based platforms.

In order to make DataVaults the "**Anchor Brand**" of its offerings, the following aspects must be central in the messages conveyed:

Differentiator 1: DataVaults exemplifies a novel Brokerage Engine

Differentiator 2: We assure compliance of regulations and legal requirements. We link novel trusted and security-by-design data mining, management, analysis and sharing techniques, with legislation- and ethics-driven functions.

Differentiator 3: DataVaults proposes a unique Personal Data Sharing Business Model. DataVaults introduces fair compensation models for all the actors of the value chain.

Differentiator 4: DataVaults includes Smart Contract Patterns and Templates for Stakeholder Collaboration and SLAs.

2.4 THE A.B.L.E® COMMUNICATION GUIDELINE AND 4 FACTOR TESTING

All content created, ranging from mere text on social posts to extensive whitepapers, as well as integrated visuals and graphics accompanying texts (for instance in cases of newsletters, banners, brochures, roll-ups etc.) must adhere the world renowned A.B.L.E.® screening in order to ensure maximum project visibility "enhancement" together with brand recognition. Such created items must be:

A-ttention building (hence attractive especially during initial critical mass creation)

B-enefit communicating (hence captivating through a distinct benefit to the stakeholder, since pure attention shall soon perish)

L-inking to DataVaults specifically and not some generic research entity dealing with parts of the project's key technologies. Simply put, there is no need to devote resources for "generic privacy awareness" unless this directly advocates DataVaults project and the efforts of the specific tasks undertaken or events within which the project participates.

E-nhancing brand recognition and project visibility and overall awareness.

All such generated content, not excluding even short social media posts shall first undergo this 4-factor testing.

2.5 EDITORIAL MESSAGING GUIDELINES TO DATAVAULTS PARTNERS

We propose the following guidelines to be used in all 2-way communications by project Partners (see relevant one-way vs two-way communication section). The editorial messaging section of the communication strategy is sets out how the DataVaults project is going to be described in a textual form (verbal or written) in many different contexts. Its aim is to clearly deliver the project's Unique Selling Proposition (USP)

2.5.1 Elevator Pitch

An 'Elevator Pitch' is the phrase or paragraph which anyone in our project could give to the member of some audience class if they found themselves together in an elevator, during the half minute it takes for the elevator to pass between floors. It must capture the essence of our offering as DataVaults so well to instigate awareness and interest, i.e. that the audience member asks for more information and/or makes a mental note to "revisit".

We propose the following Elevator Pitch:

> DataVaults aims to deliver a framework and an exchange platform for personal data, coming from diverse sources**.** DataVaults defines secure, trusted and privacy preserving mechanisms allowing data owners to take control of their data and share them at will - through flexible and fair compensation schemes- with other entities (companies or individuals).

2.5.2 Second Round Key Message conveying through Objectives

If following the above Elevator Pitch, the recipient shows an interest, further key messages can be provided, depending on the recipient's audience class, and hence reflecting our USP for that particular audience class. We advise towards key messages that are:

• Consistent (with a common narrative);
• Compelling (encourages action);
• Relevant (important to the audience);
• Credible (believable by the audience);
• Different (not available anywhere else);
• Defensible (against challenge).

Such Messages:

I. Can be derived from the business objectives of the project itself
II. We suggest they should include the project "Differentiators" as per above
III. Can also be one of the 4 messages below:

2.5.2.1 Technical Message from Objectives

The "Technical Message" can include a description from the project's technical objectives i.e.:

"DataVaults delivers the following 5 technical pillars:

- A secure and trusted Data Management and Analytics cloud based platform as a Service
- Coupled by Personal Data Apps, for storing, managing, sharing and monetizing over personal data (derivatives)
- Usable by any individual with the aim to capitalise on the real value of his personal data, without dropping control of ownership or losing track of the usage methods
- Providing also constant awareness of the privacy, security and risks
- Complemented by an integrated Data Brokerage Platform

2.5.2.2 Scientific Message from Objectives

The "Scientific message" can include a description from the project's Scientific objectives:

"DataVaults successfully links novel trusted and security-by-design data mining, management, analysis and sharing techniques, with legislation- and ethics-driven functions."

2.5.2.3 Business Oriented Message from Objectives

The "Business Message" can be in the lines of:

"DataVaults facilitates both privacy and trust preservation, risk situational awareness, with easy usage of valuable information and fair compensation models for all the actors of the value chain, and an integrated Data Brokerage Platform to co-ordinate the above"

Or alternatively:

The overall approach will rejuvenate the personal data value chain, which could from now on be seen as a multi-sided and multi-tier ecosystem governed and regulated by smart contracts which safeguard personal data ownership, privacy and usage and attribute value to all entities that generate value within this chain and especially data owners.

2.5.3 Further Messages Conveyed in terms of Engagement Strategy

The following apply mainly to digital channels

I. We encourage and enhance of Impulsive trial. This is particularly important when inviting members/visitors of the ecosystem to try our offerings and services.
II. Key factors to be communicated are dependability and compliance.
III. We encourage and reward feedback. We ask our community how they're finding DataVaults products / assets/ services, or if there's anything we can do to improve (enhance trial, get rating reviews, participate in forum, indicate ecosystem vitality).
IV. Building on “Success Stories”. Previous applications and detailed use cases persuade further trial and increase the overall brand equity.

3 DATAVAULTS PROJECT IDENTITY AND BRANDING

DataVaults, being an EC co-funded research and innovation project, requires a clear project brand identity implementation in order to have an impact with the dissemination of respective work and achievements. The recognition and perception of a brand is highly influenced by its **visual presentation**. A project visual identity is the overall look of its communications. Effective visual brand identity is achieved by the consistent use of particular visual elements to create distinction, such as specific fonts, colours, and graphic elements.

A visual identity has been created since the early stage of the project (M1 at Kick-off Meeting and the following 2 weeks), so as to secure a strong and unique brand. It will be incorporated in all promotional / dissemination material produced during the project and will be used by all project partners in their communication activities.

The identity is composed of visual elements such as:

- The DataVaults Logo in all its variations
- The Artboard and Colour Palette
- The Accompanying Visuals
- The Concept Base Artwork
- All derivatives of the above (ppt presentation templates, newsletters, brochures, banners, infographics, roll-ups, marketing pack, the website CSS and layout, etc.)

3.1 LOGO

The core of this visual identity is the logo. The logo is part of the project communication and branding; it provides a consistently unique and coherent **visibility and identity**, making DataVaults distinguishable from similar initiatives and projects. It was produced in 5 stages (iterations) presented below.

3.1.1 The final DataVaults Logo

We begin by presenting the final outcome of this procedure, i.e. the DataVaults Logo upon which all partners voted and agreed, as well as the various logo “transparency variations”. Further in this section we will also analyse the procedure followed in collaboration with all partners.

Figure 2: DataVaults Logo

The logo has been produced in all well-known vector and raster formats (and is stored in the BSCW Collaborative Workspace) including all its variations and PNG transparencies (in light/dark backgrounds, monochrome and colour variants, etc.), for use by the consortium.

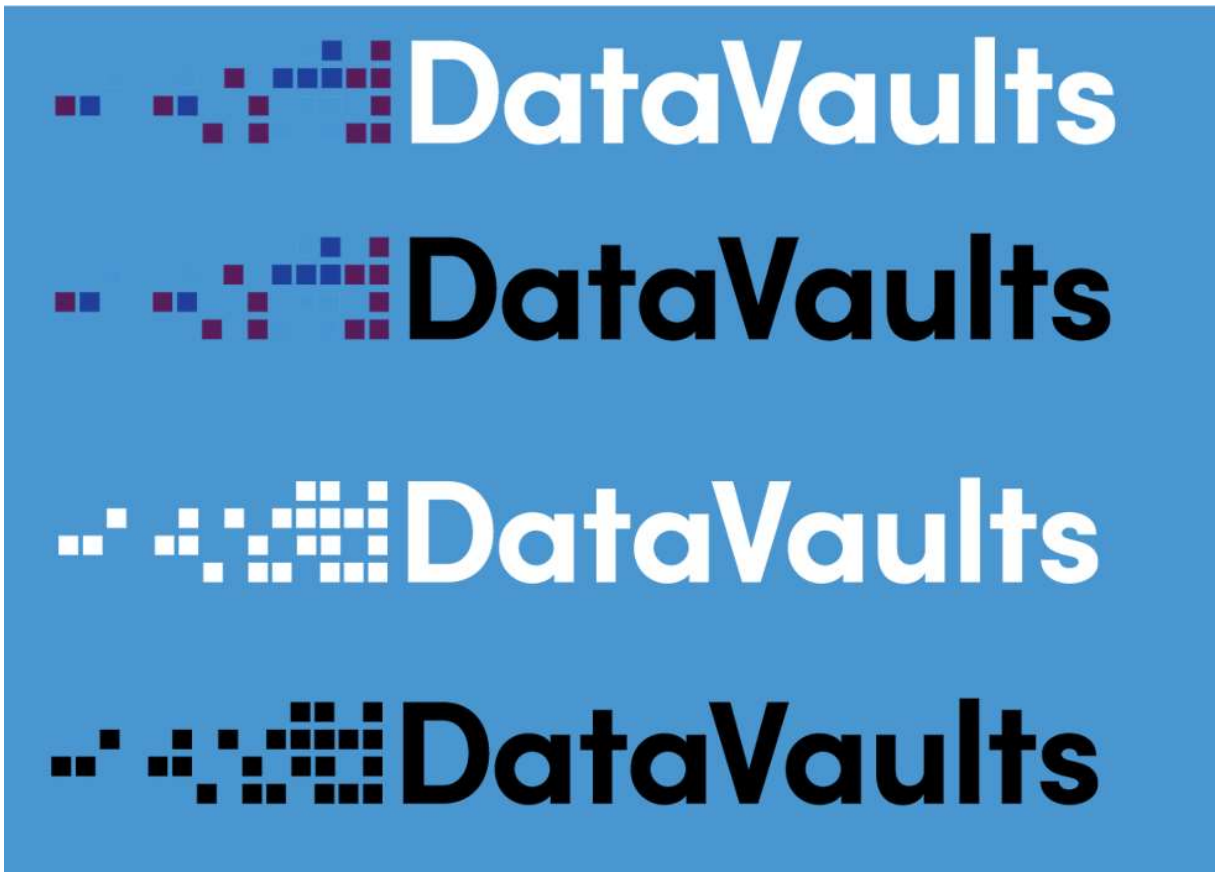

Figure 3: DataVaults Logo - Transparency Variants (mono/colour & light/dark background)

3.1.2 Creation Procedure for the DataVaults Logo – Design Iterations

3.1.2.1 Collaborative Brainstorming with all Partners at Kick-off Meeting– Capturing Requirements

At the DataVaults Kick-off Meeting in Berlin, the WP8 team has initiated discussions on the logo and the overall identity of the project. By using “crude” and “quick” (non-professional) logo examples as a starter, partner representatives engaged in a fruitful discussion and ideas of this brainstorming procedure were captured in order to create the creative briefing. These included:

- colour schemes,
- geometric layout,
- sentiments the logo should involve,
- nuances,
- icon references,
- points to avoid, sensitive issues,
- paradigms from other projects etc.

The following “discussion board” for collaborative brainstorming was used

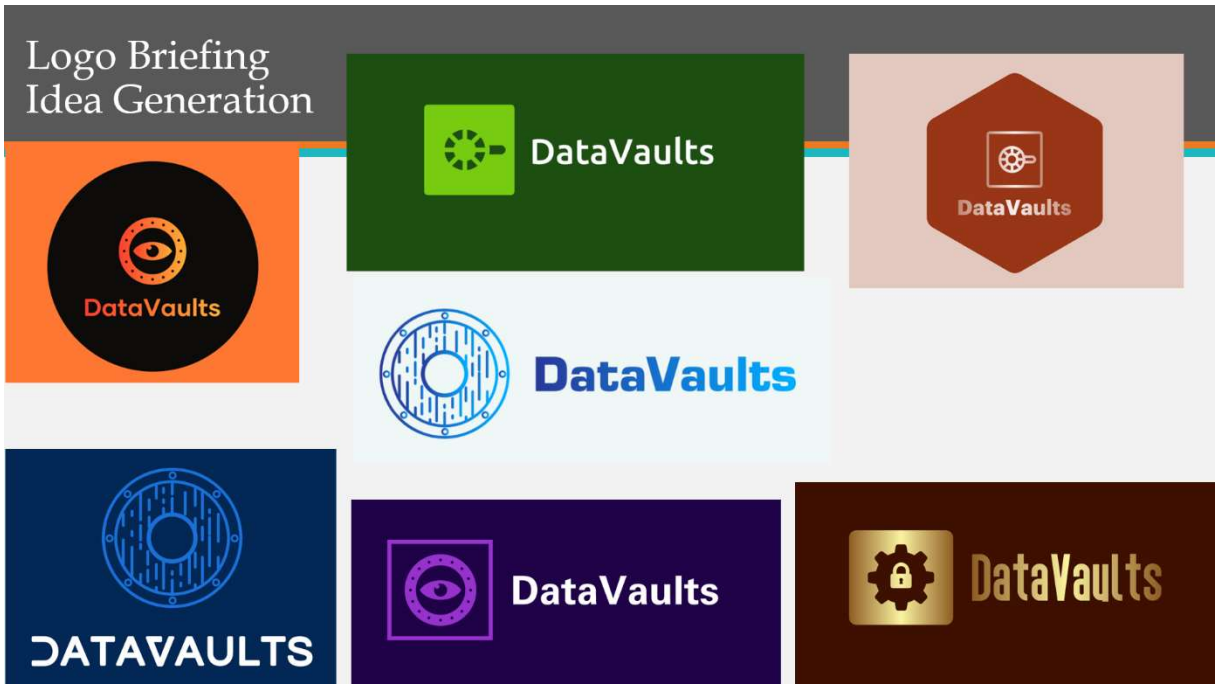

Figure 4: Kick off Collaborative Brainstorming and Idea Generation on the DataVaults Logo

3.1.2.2 Creation of Logo Briefing

The above procedure yielded notes which were combined with the project's executive summary from the DoA, and also distinct keywords taken the project's objectives. These formulated a one-page briefing to be delivered to the creative design team.

3.1.2.3 Creative Design Team Proposals

The creative design team, yielded several alternatives based on the briefing. Every logo was accompanied with explanatory keywords and indicative layouts shown below

3.1.2.4 Sketch-Board Proposal 1

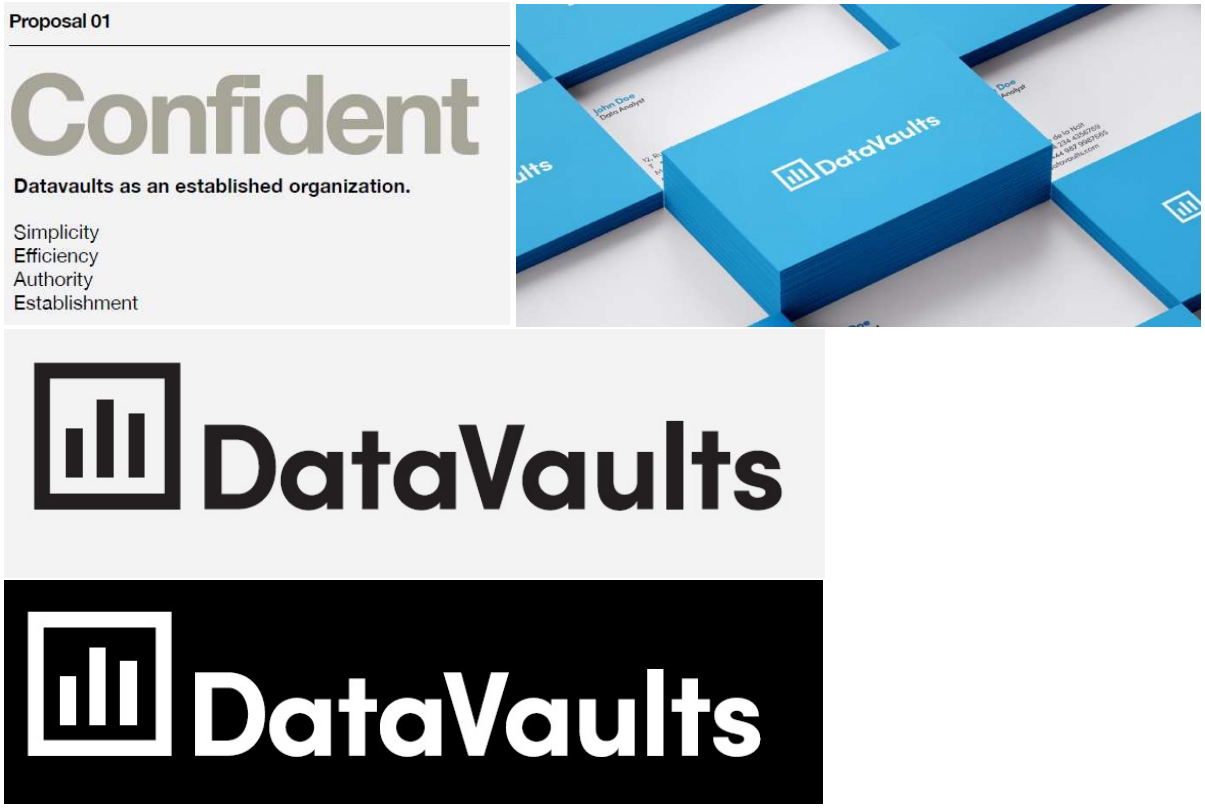

Figure 5: Sketch-Board Proposal 1

3.1.2.5 Sketch-Board Proposal 2

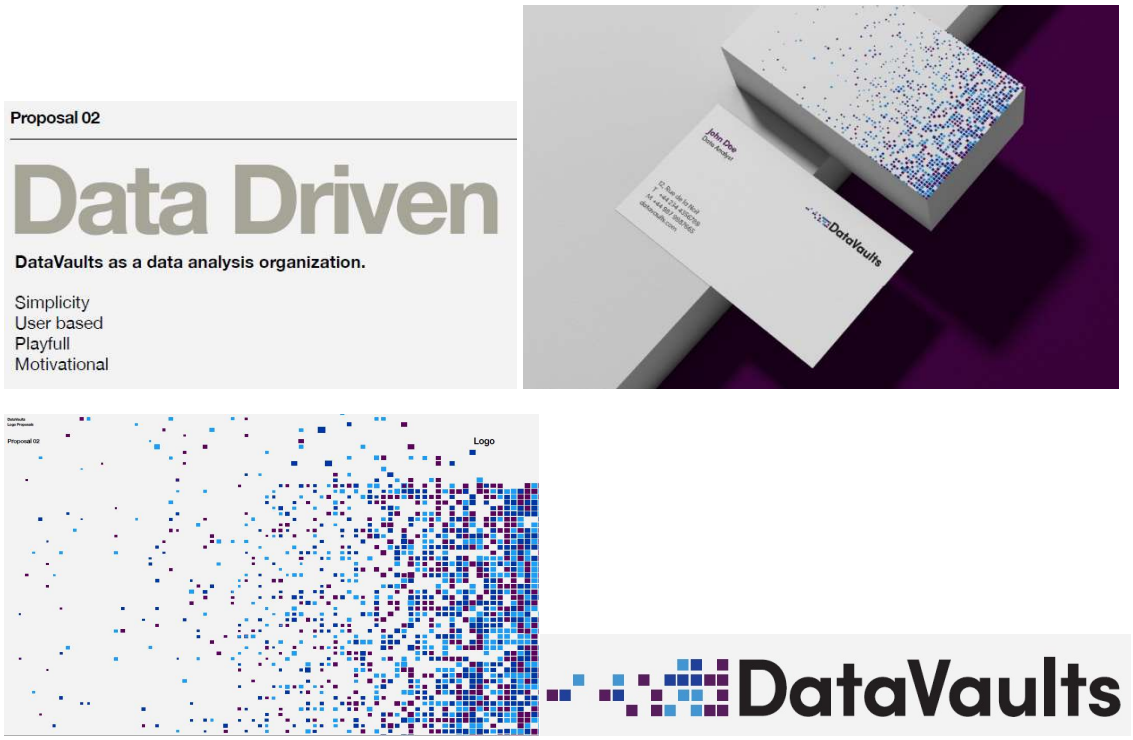

Figure 6: Sketch-Board Proposal 2 (the winner)

3.1.2.6 Sketch-Board Proposal 3

Figure 7: Sketch-Board Proposal 3

3.1.2.7 Sketch-Board Proposal 4

Figure 8: Sketch-Board Proposal 4

3.1.2.8 Sketch-Board Other Dismissed Proposals

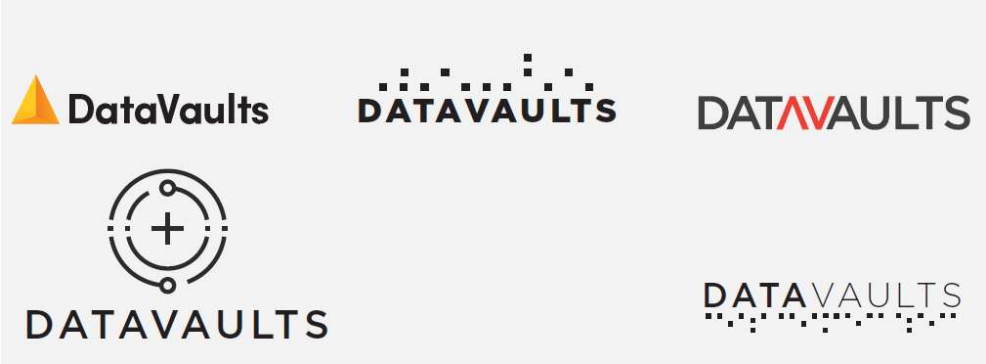

Figure 9: Sketch-Board Other Dismissed Proposals

3.1.2.9 The Partner Decision

An online vote held among all consortium partners yielded a clear winner on the one hand (proposal no2) with more than double the votes from the other alternatives. Moreover, proposal no4 gathered several votes for its use of a "vault" icon, related to the project's acronym. The final decision was for the graphics designers to build on the winner logo but to also include some visuals with the "vault" icon. We present all visuals below.

3.2 ARTBOARD, VISUALS, AND TEMPLATES

3.2.1 Base Artwork – The Pixels Concept

The logo is accompanied with the "Pixels Concept" Base Artwork. It is based on the notion that:

DataVaults shall be able to forge novel solutions and compose structured added value offerings from seemingly uncorrelated Big Data through Artificial Intelligence in a trustworthy way.

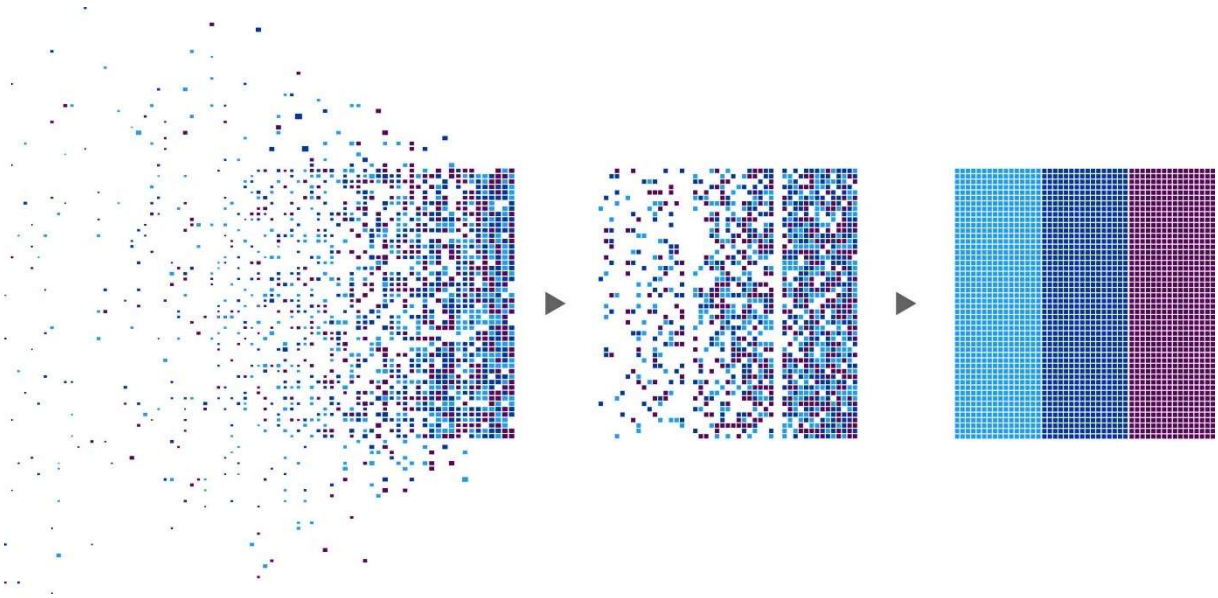

Figure 10: Pixels Base Artwork 1

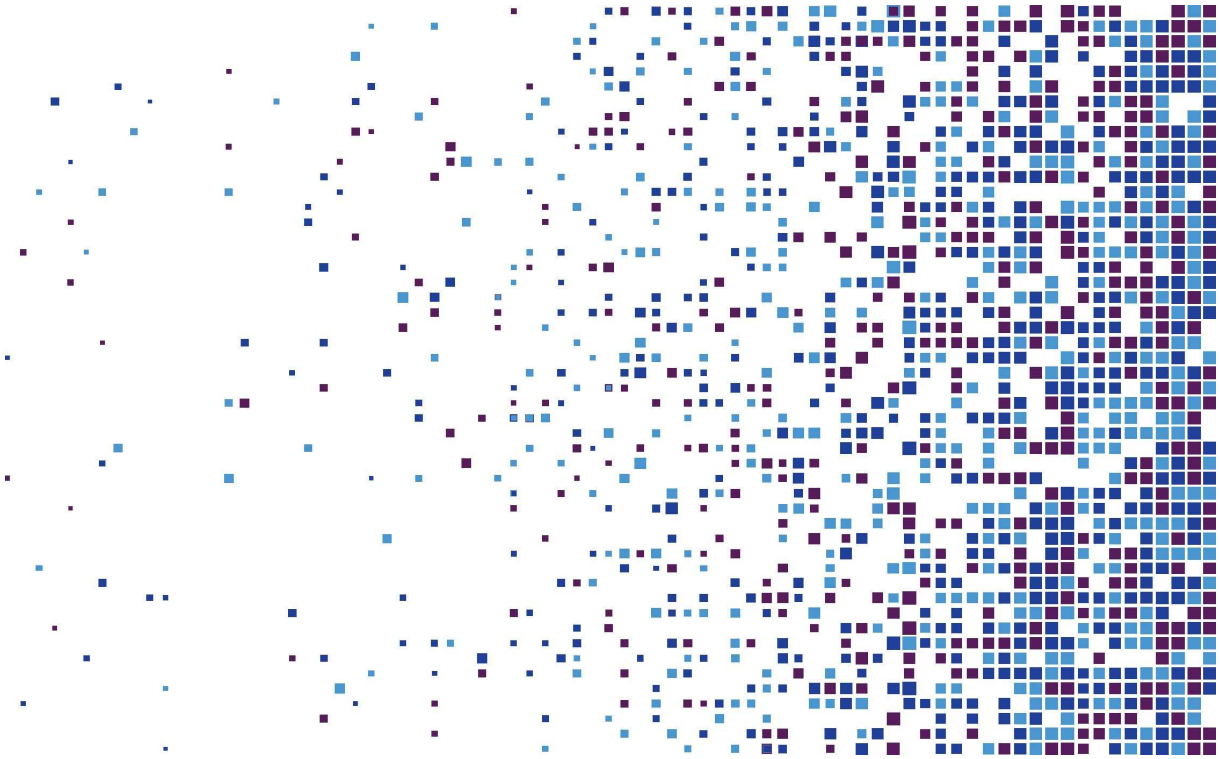

Figure 11: Pixels Base Artwork 2

Figure 12: Pixels Base Artwork 3

3.2.2 Accompanying "Vault" Visuals

By incorporating the "Vault" icon that partners opted for in the 4th proposal, the design team has also created several other high-resolution visuals to support the establishment and enrichment of social media pages and the production of diverse material such as project documents' templates, the marketing pack, the integrated digital presence etc.

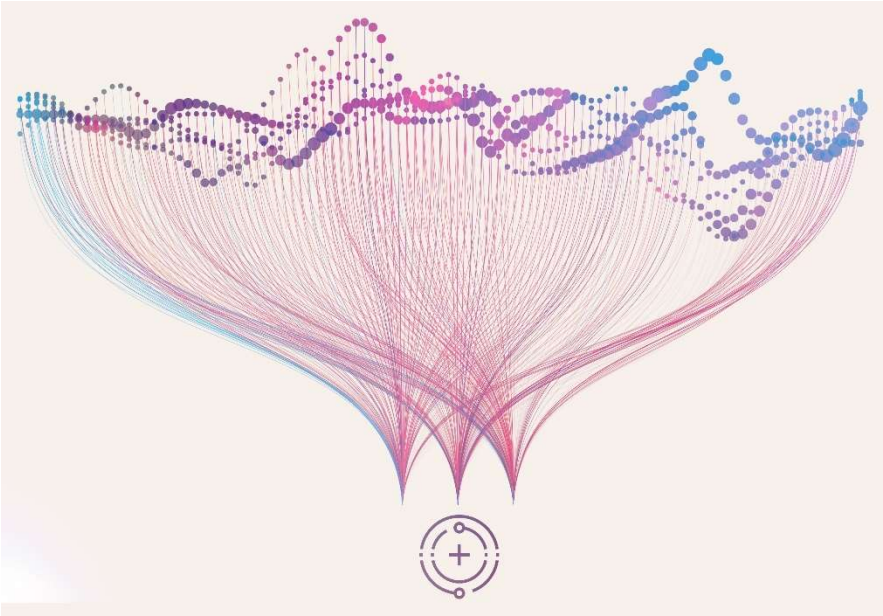

Figure 13: Vault Visual 1

Figure 14: Vault Visual 2

Figure 15: Vault Visual 3

Figure 16: Vault Visual 4

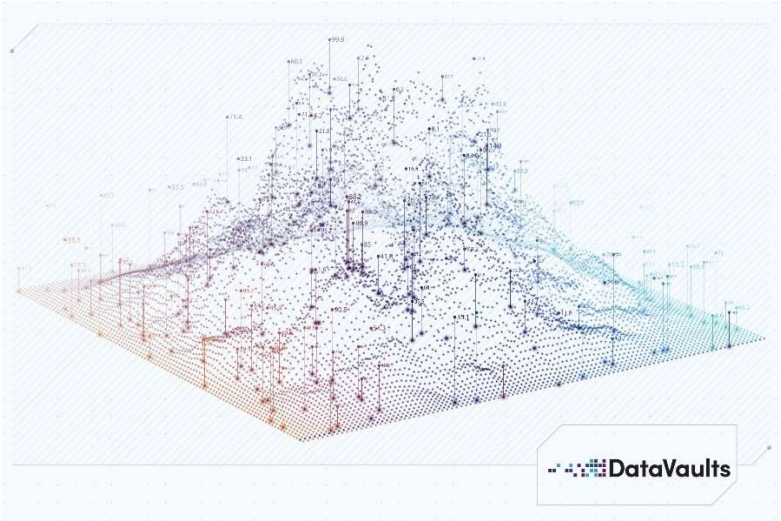

Figure 17: Vault Visual 5

3.2.3 The Artboard and Colour Palette

The exact colour scheme (RGB and HEX) and the artboard are shown below. These shall be the basis for:

- The DataVaults PowerPoint Presentation Template
- The Website "Theme" and Graphic Layout
- All DataVaults digital and printed material

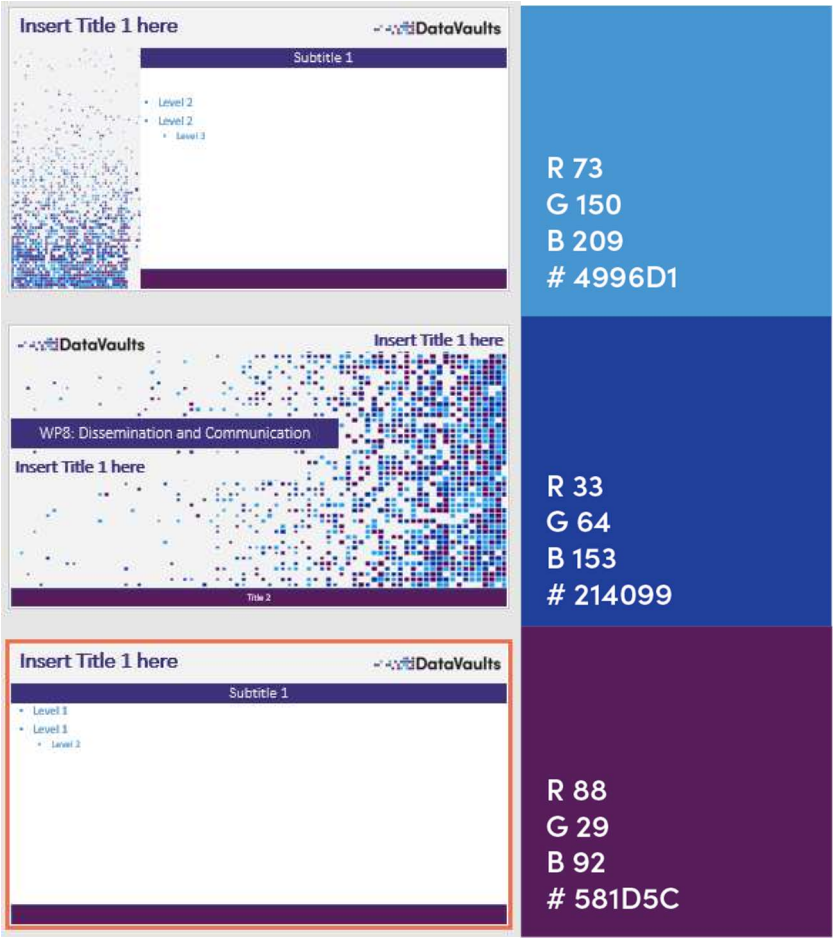

Figure 18: DataVaults Artboard- Colour Palette- Templates

3.3 DATAVAULTS DISCLAIMER AND EU EMBLEM

"DataVaults is a project co-funded by the European Commission under the Horizon 2020 Programme (H2020-ICT-2019-2) under Grant Agreement No. 871755 and is contributing to the BDV-PPP of the European Commission." The above text with the EU Emblem shall be used in all publications, dissemination material, social posts, and overall media presence (digital or printed) of DataVaults as per EC Guidelines [1,2,3,4]

4 DISSEMINATION AND COMMUNICATION ACTIVITIES – STAKEHOLDER IDENTIFICATION

4.1 DISSEMINATION ACTIVITIES

4.1.1 Events-based Dissemination

Awareness, Interaction and Promotion regarding DataVaults is expected to be impacted positively by the project representation in relevant events. Events are an important means for the consortium to communicate and disseminate the aims, developments and results of its work. We distinguish among:

1. Events Organized by DataVaults
2. External Events in which DataVaults will participate

Events are often the only way of interesting mainstream press in EU affairs, to ensure a Press Release and organise interview opportunities with high-profile participants. The project will be supported by the relevant communication material produced, namely the Event Toolkit (brochure, banners, posters, flyers etc.). As the per Grant Agreement specifications, we expect to be involved in a variety of event formats, such as:

1. Workshops organized
2. Dataphones/Hackathons organized
3. Demo Events organized
4. Scientific Conferences
5. Industry Events
6. Fairs and Exhibitions
7. Events of affiliated projects, clusters and communities

The first three categories are currently being planned in collaboration with the consortium. Their exact targets and KPIs are presented in the next chapter. Candidate industrial events include: WebIT Conference, Tedx, European Data Forum, BDVA Summit, Hannover Messe, MWC. All such events shall be recorded and managed through the online dissemination tracker.

4.1.2 Press-based Dissemination

The project will produce a multitude of press-based dissemination items as mentioned in the next chapter KPIs and metrics. These include among others

1. The project's Event Toolkit
2. Articles in Industry Magazines
3. Press Releases in Traditional Media
4. Newsletters
5. etc

4.1.3 Print-based Dissemination

Print-based dissemination material includes:

1. The Brochure in 3 revisions
2. The Banner in 3 Revisions
3. Roll-ups, flyers, identification material
4. The complete Marketing Pack as a kit (the outcome of D7.3 in M28)

4.1.4 Scientific Publications

Publications in specialised journals and conferences are a conventional but effective way to disseminate project outcomes and attract the attention of the scientific, business and public stakeholders. Scientific dissemination will be performed mainly by the research partners. To support this activity, publications will also be promoted/featured on the project's website.

Potential academic conferences considered include: IEEE INFOCOM, IEEE BIG DATA, ICBDA, IEEE BDSTA, VLDB, ACM SIGMOD, ICDE, DaWaK-DEXA, ESWC, ECIS, IEEE/WIC/ACM, ICWE, CCS.

Candidate journals include: IEEE Transactions on Knowledge & Data Engineering, Journal of Big Data (Springer), Big Data Research (Elsevier), International Journal of Big Data Intelligence, IEEE Transactions on Big Data, Big Data and Information Analytics (BigDIA) etc.

By adhering to the EC Guidelines on Open Access to Scientific Publications and Research Data in H2020, DataVaults will also follow a combination of Gold and Green Open Access strategy to its scientific publications, with a potential embargo period for peer-reviewed publications that will be agreed during the first months of project execution. Gold Access will be encouraged for high-impact journal publications while the self-archiving, Green Access will be granted for the rest of the publications.

4.2 COMMUNICATION ACTIVITIES

4.2.1 DataVaults One-Way vs Two-Way Communication

We distinguish between one-way and two-way communication as these require somewhat different approaches. Generally, the former is more mass and volume oriented whereas the latter is more focused and interpersonal.

Examples of two-way communication (interpersonal and focused)	Examples one-way communication (mass broadcasting – large volume)
Events (Scientific, Industrial, other)	Brochures, Booklets, Flyers, Roll-ups, Posters
Conferences	Press Releases
Tradeshows, Fairs, Exhibitions, Tours	e-Newsletters
Standardisation committees, groups and bodies	Website
Round Tables	Blog
Hackathons	Social Media Channels
Workshops	Traditional Media (newspapers, magazines, TV, Radio, etc.)
Open-days	Videos (ex. YouTube, Vimeo etc.)
Private Contacts	Policy Briefs, Manuals, other one-way texts
Joint Events within clusters, liaisons, affiliated projects	Whitepapers, Publications, Books, Papers in Journals

3rd Party Demonstrations and Prototypes	Usecase Demonstrations and Pilots
Surveys and Questionnaires (online or paper)	Advertising promotional material, stickers, pens, usb sticks, other identification material

Table 1: DataVaults one-way vs two-way communication

It is clear that the first category is heavily influenced by the actual member of the consortium participating as a medium of communication of the project's image (of course always adhering to the general guidelines and strategies agreed) and interpersonal skills play a crucial role, whereas the second category is centrally coordinated by the WP8 communication and dissemination experts, and designing an effective strategy is paramount. DataVaults aspires to make the best out of both worlds towards achieving its objectives.

4.2.2 Digital Channels

This is the core topic of Deliverable D8.2 which will follow in one month from the present deliverable (i.e. in M3), where the project's website and all Social Channels will be instantiated. For the purpose of the present deliverable we mention that:

4.2.2.1 Project Portal

The domain name www.datavaults.eu is already reserved. The portal design has already taken into account the identity, logo, branding and colour scheme illustrated in the present deliverable and is under preparation at the moment of writing of this document.

4.2.2.2 Social Media Channels

Despite the fact that these will be properly presented in M3 within D8.2, it has been deemed important to launch these channels as soon as possible (from M1). The relevant names have already been reserved under a dedicated DataVaults email account and whenever **DataVaults** was unavailable, the similar **DataVaults_Project** was selected. Hashtags and key messages are almost complete within D8.3, together with a basic list of 100+ links and @follows to begin with. Social Media Channels will be live within M2.

Evaluation based on traffic and also scope of the project has yielded the following list:

ID	Communication Channel	Type
1	Twitter	Primary
2	Facebook (page)	Primary
3	Facebook (group)	Secondary
4	Linkedin	Primary
5	Youtube	Primary for Videos
6	Slideshare	For presentations / Trainings
7	Instagram	Secondary
8	ResearchGate	Examined as Scientific Focus
9	Wikipedia Page	Under Consideration
10	Labs Explorer	Scientific / Dismissed
11	Reddit	Inappropriate / Dismissed
12	Tumblr	Inappropriate / Dismissed

13	Vimeo	Redundant / Dismissed

Table 2: DataVaults Social Media Channels

4.2.2.3 Digital Channel Guidelines

General guidelines on such channels are quite well known (ex. [40-45] and also through EC guidelines [1-4]), while the dissemination/communication team is very experienced in similar initiatives and H2020 projects. From a strategic point of view, we would only like to mention that:

1) We intend to leverage UGC (User Generated Content)
2) We shall make dual use of social media as a Discovery Engine of the project's offerings and potential added value (in collaboration with the exploitation team of WP7)

4.3 STANDARDISATION ACTIVITIES

DataVaults envisions to actively contribute to the normalisation and interoperability efforts regarding the data economy that the European Commission instruments, standardisation bodies and private organisations are pursuing. Towards this goal, the consortium will continuously analyse the standardisation potential of the project's key innovations and will map the key exploitable innovations to the standardisation objectives in order to prepare a concrete plan to submit contributions to relevant standardisation bodies. Objectives include:

1) Stimulating pre-normative or standardisation activities related to aspects of DataVaults
2) Liaising with the appropriate standardisation bodies and initiatives in order to ensure that DataVaults is building upon emerging standards.
3) Providing industry sector specific best practice solutions which can be described in recommendations or technical reports

All relevant findings of the project, will be communicated to the corresponding European or International standardisation bodies such as IEEE, W3C, CEN, DIN, OASIS, and ISO, and more indicatively to working groups on:

1) Personal Data relevant standards and working groups, as the IEEE P7002TM Data Privacy Process, or the IEEE P7006TM, Standard for Personal Data Artificial Intelligence (AI) Agent.

2) Security related standards like those described in the Trusted Computing Group [TCG], the ISO/IEC JTC 1/SC 27 IT Security Techniques committee, the ETSI Cyber Security Technical Committee (TC CYBER).

3) Big Data standards such as the ITU standard Y.3600: Big data - Cloud computing-based requirements and capabilities.

4) Semantic Web standards (especially W3C Semantic standards) with additions such as metadata and W3C RDF vocabularies and these of Linked Open Vocabularies, schema additions to schema.org etc. around the concepts of creativity and creative industries.

4.4 Stakeholder Identification and Management

Despite the fact that this deliverable is submitted early (in M2) and two more revisions of a more mature plan combined with progress reporting are expected in M18 (D8.3) and M36 (D8.4), we proceed with a first stakeholder analysis.

4.4.1 Stakeholder Distinctions

Although in most cases the set of communication, dissemination, exploitation stakeholders, and potential customers/adopters coincide, it is quite clear that these are 4 distinct groups. A prominent example is standardisation bodies and EC policy makers which are key communication targets yet cannot be perceived as direct exploitation targets or potential customers for monetisation (at least not directly). In any case we proceed a general taxonomy and revisions shall be made accordingly.

4.4.2 Focus Methodologies on select key stakeholders

The plan dictates that for a select sub-group of stakeholders that are deemed to be crucial, the WP8 team in collaboration with consortium partners will try to employ 2 specific stakeholder profiling methodologies that comprise parts of the Platform Innovation Kit [23] and are briefly presented in the Appendix. Namely:

- The PIK Stakeholder Focus – Platform Service Canvas
- The PIK Stakeholder Persona Canvas Template

This procedure is planned for the second revision i.e. for M18 when several aspects will be clarified and some first feedback and metrics will be available.

4.4.3 Audience Segmentation – Persona Creation

Audience Segmentation (just like Market Segmentation in Strategic, Marketing and NPD plans) is a process carried out sequentially. The first stage is known as macro segmentation and involves the use of easily observable variables, such as traits, geographic and demographic characteristics, goals, business scope, interests, time and place availability of prospects etc. The micro-segmentation is the second stage and aims to delineate homogenous groups of organisational interested parties within relevant macro segments, by using individual and relational criteria. This triggers the opportunity for precise targeting, with knowledge of what the retention and value drivers are for each targeted audience. Towards this scope a set of approximately **5-Personas** will be built for communication and dissemination purposes and these will also be shared with the exploitation team within WP7. The result of this well-known methodology [39] is expected to be developed before M18 and shall formulate the basis for:

1) Proper Stakeholder categorisation
2) Focused and curated content creation
3) Higher engagement, capturing and retention of community members, portal registrants and a critical mass initial growth
4) Representations of ideal users (for exploitation) and audience (for communication)
5) With the parallel benefit of enhanced organisational planning.

4.4.4 First Stakeholder Category Identification

The following is a first list of stakeholder categories. Each category is expected to be expanded and augmented with sub-entries in the next 2 months from the deliverable's submission.

1. Primary Data Providers
2. 1st-tier economic operators / Data Seekers
3. 2nd-tier economic operators / Data Services & Analytics Providers
4. IT SMEs and Entrepreneurs on all DataVaults related technologies
5. IT Large Scale Industries on all DataVaults related technologies
6. Data Scientists, Researchers and Academia on relevant topics
7. Standardisation Bodies on relevant topics
8. Policy Makers on Data Privacy, Security, Trustworthiness
9. Policy Makers on Big Data and Analytics
10. Consortium Partner Networks (clients, collaborators, suppliers etc.)
11. Affiliated Projects, Clusters and Ecosystems
12. Industry Associations & Technology Clusters
13. European initiatives and clusters (like BDVA and FIWARE)
14. Research communities, associations, federations (like IMS, EFFRA, IFIP, IEEE, NEM)
15. The general public as indirect beneficiaries

4.5 LIAISONS AND AFFILIATIONS

4.5.1 First List of Project Affiliations

Although the project list will be expanded substantially as the project progresses, we already consider affiliation with the following projects and their existing ecosystems and communities:

1. DECODE
2. ICARUS
3. AEGIS
4. Future TPM
5. CONCORDIA
6. TOREADOR
7. ABC4EU, ARIES

4.5.2 Other Liaisons

We envision to also achieve community links from the following parallel paths:

1. Industry links from direct partner contacts and the engagement tracker
2. Affiliations/Ecosystems/Liaisons through BDV PPP
3. Liaison with working groups/ Standardization bodies
4. Internal dissemination in partner networks, sites, social media, newsletter, events, premises
5. Joint Activities, Collaborations, Synergies with the project's cluster and from similar research initiatives
6. Isolated/Other

5 Monitoring and Evaluation of Dissemination and Communication Activities

5.1 The DataVaults Dissemination Tracker

An online Tracker is part of the process applied to effectively monitor and assess the dissemination and communication activities implemented within the project. For the online and direct collection of information related to the dissemination activities implemented by the partners, as well as easy reporting and follow-up, an online collaborative spreadsheet (also stored in the BSCW repository) consisting of four (4) sections was created and is made available to partners. Publications as well as Events are monitored in the exact same categories and naming employed in the EC Participants Portal. Hence reporting is simplified. Moreover, dropdowns of predefined selections as well as an extra table (conveniently named "other categories") for all entries that cannot be foreseen or properly categorized, have also been created. Furthermore, it includes a set of KPIs that covers all the aspects of the dissemination and communication. More on the full KPI list in the next section.

Compliance to privacy and security guidelines, dictates that the tables, the partner entries and the online link are not included in this public deliverable, yet the following snapshots clearly depict the tracker, which nevertheless is obviously fully available to the European Commission Services and the DataVaults partners.

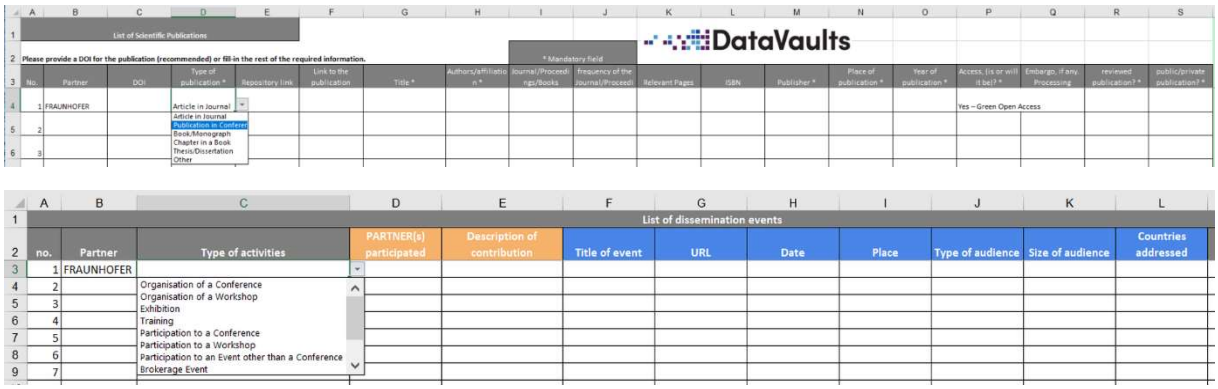

Figure 19: DataVaults Dissemination Tracker

5.2 The 3-Phase Plans, Measurable Impact and Objectives

All 3 plans (i.e. communication, dissemination and ecosystem engagement) will undergo constant re-evaluation and refinement throughout the project. Furthermore, to this (M3) deliverable, iterations with minor refinements are planned to be made in M18 and M36 when the relevant deliverables (D8.3 "interim" and D8.4 "final") are due to be submitted. Most importantly, we focus on the actual metrics and KPIs that have been achieved and the level of maturity that the relevant objectives have attained.

In addition to the following 3-phase figures, we have decided together with the exploitation team in WP7, to start designing an additional phase, "Phase IV: Post-project Communication", which is aspiring to guarantee further promotion of project's results beyond its contractual lifetime add intensify the activities necessary for route to market entry of key exploitable

assets. We can discern 3 "non-strict" yearly phases (namely Awareness, Diffusion and Intensified Promotion, which can obviously overlap as the project progresses, with the strategic intention to begin diffusion even earlier than the 2nd year. We also note very distinct and clear KPIs and Objectives that need to be achieved. Moreover, we segregate Dissemination and Communication in the following 3-phase figures, and furthermore into the relevant Di and Ci activities which also lead to tangible KPIs found in the next section.

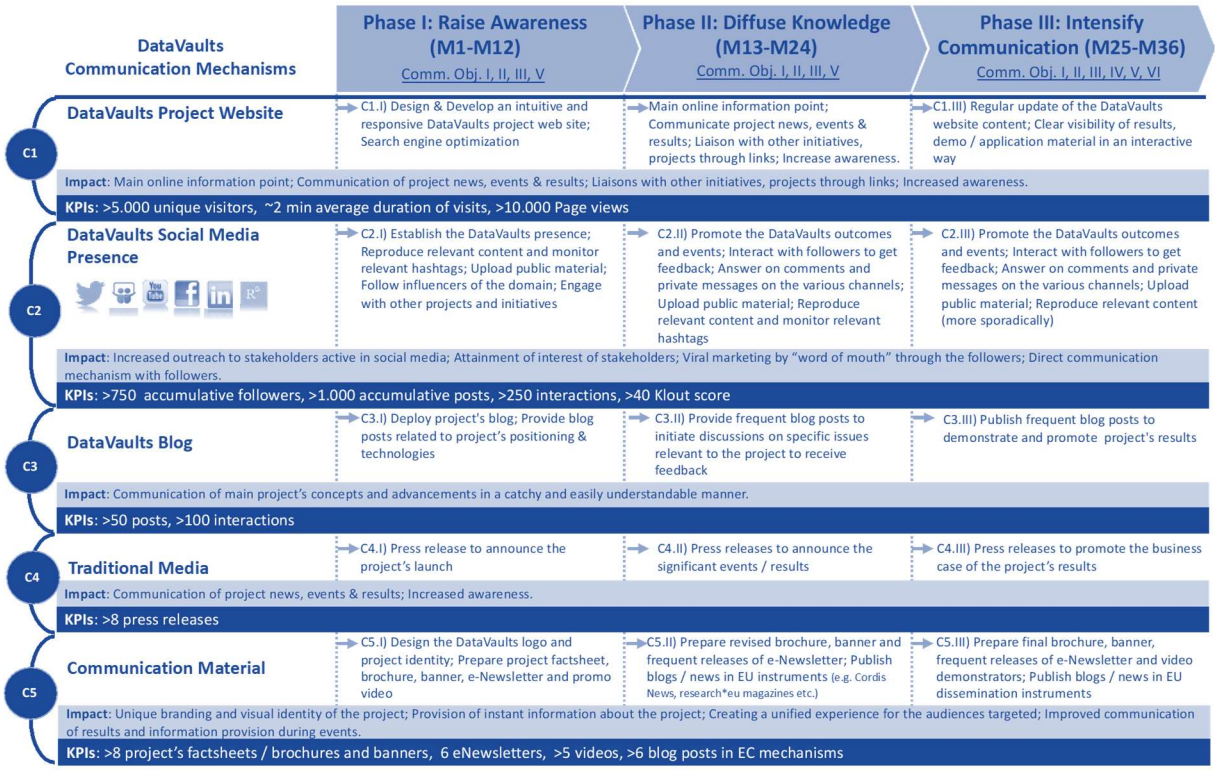

Figure 20: DataVaults Communication Mechanisms and Impact Activities

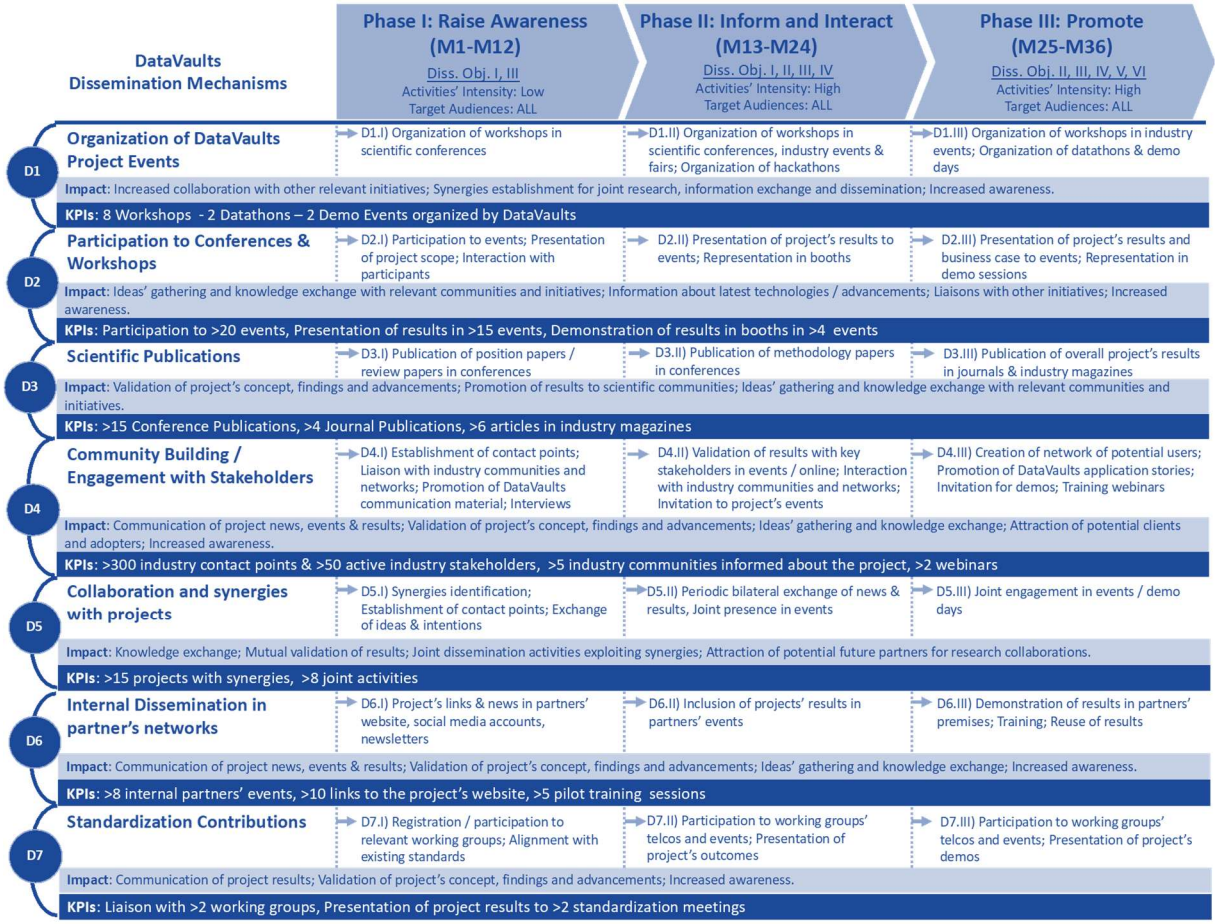

Figure 21: DataVaults Dissemination Mechanisms and Impact Activities

5.3 KPIs & METRICS

In order to measure the impact of the conducted activities and to be able to adjust the dissemination and communication strategy for achieving the expected outcomes and maximising visibility, a set of initial metrics has been developed. Such metrics will allow having a constant view of the amount and the effectiveness of the dissemination activities conducted.

The following constitute a set of quantifiable targets for the promotional activities of DataVaults. They are the aggregation targets from proposal stages, the Grant Agreement, the complete plan of the present deliverable (and obviously all its future revisions and improvements) as well as additions that the dissemination team in tandem with the Program Office and the exploitation team will deem noteworthy to add as supplementary targets.

This master list is also integrated within the online dissemination tracker as a separate worksheet.

Monthly reviews as well as reviews during all General Assembly meetings and Telcos will monitor their progress closely, in order identify potential bottlenecks or minor deviations, and ensure that resources are shifted promptly and correctively if needed towards their final accomplishment.

5.3.1 DataVaults Impact KPIs

DataVaults partners aspire to exceed instead of merely reaching the following list of Impact KPIs, concerning Dissemination and Communication Activities in all parallel channels, as these are gathered from the relevant sections of the Grant Agreement and tracked through the plan presented in this deliverable.

Note: This list might be further enriched as the project progresses and the present plan is updated and refined accordingly (in M18 and M36 respectively).

Note2: This list shall be included with progress tracking in all reporting cases (relevant deliverables D8.3, D8.4, project reviews etc.)

ID	Relevant Activities	Impact Metric – KPI	Target
1	Organisation of Events in Scientific Conferences, Industry Events & Fairs, Demo-days & Hackathons	Workshops organized	>=8
2		Dataphones/Hackathons organized	>=2
3		Demo Events	>=2
4	Participation and presentation to Conferences, Workshops, Representation in Events	Attended events	>=20
5		Events with project's presentation	>=15
6		Project's demo booths	>=4
7	Scientific Publications, Knowledge Dissemination	Conference publications	>=15
8		Journal papers	>=4
9		Articles in Industry Magazines	>=6
10	Community Building, Engagement with Stakeholders, Industry Links	Industry contact points	>=300
11		Active industry stakeholders	>=50
12		Industry communities informed about the project	>=10
13		Webinars/Trainings	>=2
14	Collaborations, Synergies, Liaisons, with projects clusters and initiatives	Synergies with Projects	>=15
15		Joint Activities, Joint Dissemination, Joint presence in Events	>=8
16	Internal dissemination in partner networks, sites, social media, newsletter, events, premises	Internal partners' events	>=8
17		Links to the project's website	>=8
18		Pilot training sessions	>=5
19	Standardisation Contributions	Liaison with working groups	>=3
20		Project presentation in standardisation meetings	>=2
21	DataVaults Project Website	Unique visitors	>=5000
22		Average duration of visits	˜ 2 min
23		Page Views	>=10000
24	DataVaults Social Media	Social Media Accumulative followers	>=750
25		Social Media Accumulative posts	>=1000
26		Social Media Interactions	>=250
27		Klout score	>=40
28	DataVaults Blog	Blog Posts	>=50

29		Blog Interactions	>=100
30	Traditional Media	Press Releases	>=8
31	Communication Material	# of project factsheets/ brochures and banners	>=10
32		e-Newsletters	>=6
33		Videos (1 promo video, 4 demonstrators' videos)	>=5
34		Blogposts in EC Mechanisms	>=6

Table 3: DataVaults Impact KPI List

Moreover, the following communication items (in addition to entry 31 above) are foreseen for the project as presented in detail in the table below

ID	Communication Item	Timeframe
1	Project Logo	Completed
2	Project Identity	Completed
3	Project Visuals	Completed
4	Project Brochure version 1	M1-M12
5	Project Brochure revised	M13-M24
6	Project Brochure final	M25-M36
7	Project Banner version 1	M1-M12
8	Project Banner revised	M13-M24
9	Project Banner final	M25-M36
10	DataVaults Marketing Pack for Product Launch	D7.3 M28
11	DataVaults Website and Blog	D8.2 M3
12	DataVaults Social Media Channels	D8.2 M3

Table 4: DataVaults Communication Material Analysis

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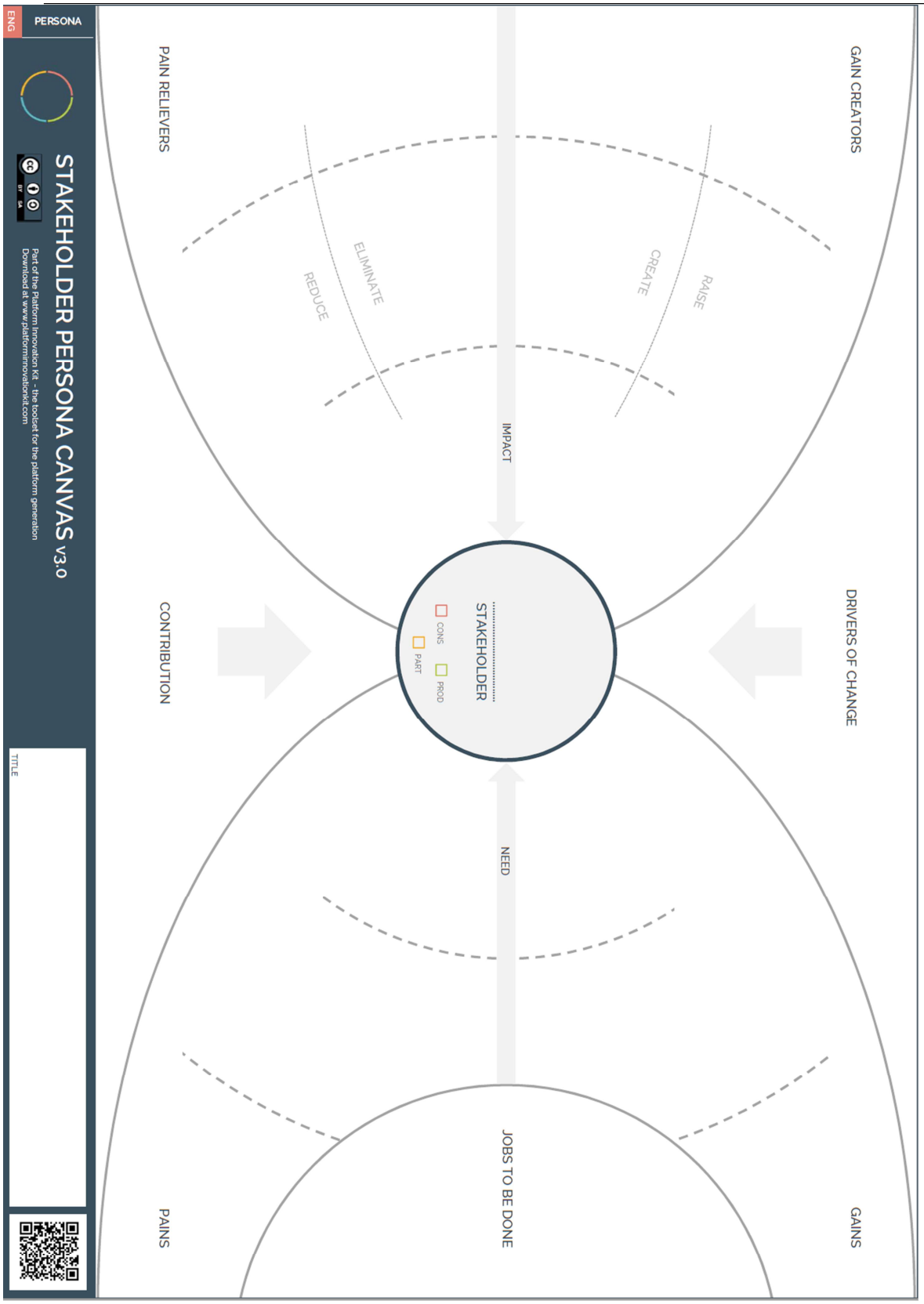
APPENDIX A: STAKEHOLDER & PERSONA ANALYSIS TOOLS

APPENDIX A1: PIK STAKEHOLDER PERSONA CANVAS TEMPLATE



APPENDIX A2: PIK STAKEHOLDER FOCUS – PLATFORM SERVICE CANVAS