HIGH INTEGRATION OF RESEARCH MONOGRAPHS IN THE EUROPEAN OPEN SCIENCE INFRASTRUCTURE

Deliverable 7.1 MS 21

Report on Stakeholders and European infrastructures related to Open Science in HSS (D 7.1) *and* Informed communication and outreach strategy, based on coordinated core mission (MS 21)

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Abbreviations

HSS: Humanities and Social Sciences

OA= Open Science

OS= Open Science

WS= Workshop

WP= Work Package

1. Executive Summary

This document presents the *Report on stakeholders and European infrastructures related to Open Science* (Deliverable 7.1) of HIRMEOS Project. The report contributes to reaching the Milestones 21 by providing an *Informed communication and outreach strategy based on coordinated core mission*. The developed strategy is intended to be updated mid-way through the project.

All the members of HIRMEOS consortium participate in the elaboration and in the implementation of the communication and the outreach strategy. For the production of the deliverables of Work Package (=WP) number 7 is responsible UGOE, the leader of this WP. The main tasks of WP 7 are to:

- Develop a communication and outreach strategy
- Prepare efficient tools for the communication toward the various stakeholders
- Outreach the various stakeholders

Foster and strengthen communication with a network of key stakeholders and scientific communities

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2. Introduction and Background

HIRMEOS is a 30-month project funded under the Horizon 2020 Program of the European Commission. It focuses on the monograph as a significant mode of scholarly communication in the Humanities and Social Sciences (HSS) and tackles the main obstacles to the full integration of important platforms supporting open access monographs and their contents. The consortium of HIRMEOS is composed of nine partners from seven countries.

The core mission of HIRMEOS is to:

- Intensify usage on open access books through addition of new services and data
- Increase coordination and cross-linking between the platforms and with other indexing services
- Integrate research books in the open science ecosystem
- Boost user-driven innovation in the academic book publishing sector, both commercial and non-commercial

The platforms participating in HIRMEOS (*OpenEdition Books, OAPEN Library, EKT Open Book Press, Ubiquity Press and Göttingen University Press*) will be enhanced with tools that enable identification, authentication and interoperability, so as with and tools that enrich information and entity extraction. New services will allow annotating monographs and gathering usage and alternative metric data. HIRMEOS will also enrich the technical capacities of the Directory of Open Access Books, while it will also develop a structured certification system to document monograph peer-review.

The WP 7 applies a holistic approach to design HIRMEOS' mode of communication and outreach. WP7 main goals are to strengthen HIRMEOS' international network and core mission and to foster the joint development and aligned implementation of state-of-the-art services. WP7 aims to reach out to all relevant stakeholders and communities, in research and the public, in order to ensure that HIRMEOS' services for scholarly monographs are aligned and interoperable with existing infrastructures for Open Science and stakeholders' and communities' needs.

More specifically, the WP 7 consists of four **TASKS**:

T7.1 Communication and Outreach Strategy

T7.2 Dissemination activity

T7.3 Community Outreach

T7.4 Alignment and exploitation

3. Stakeholder Communities

In order to achieve HIRMEOS' communication and disseminations goals it needs an acute understanding and precise delineation of the key stakeholder communities concerned by the project. Each community has different needs and expectations. In order to contact and inform its stakeholders and maximize its visibility, it is important that HIRMEOS develops a multilevel Approach, using varied communication styles and different communication channels. HIRMEOS aims also to promote citizens' engagement in science and research. It will organize events and communications platforms to enable the dialogue between academics and citizens. Annotation feature will increase usage by the citizens of the academic output and new metric services will give some feedback to the authors.

The target groups of Stakeholders, who will be approached at various levels as listed in the table below, are the following:

- Members of HIRMEOS' Consortium and members of other projects related to HIRMEOS
- Academic Community (HSS)
- Libraries and Publishers
- Other Projects and Networks related to OPEN ACCESS
- Local, National and EU Policy Makers & Funders
- IT Providers, Start-ups and SMEs
- Media and and General Public

3.1 Members of HIRMEOS' Consortium, Other projects related to HIRMEOS

Description: WP Leaders and other partners involved in HIRMEOS' Consortium; Members of other OA related Projects (above all, OPERA and OpenAIRE)
Importance: Very high. All partners of HIRMEOS are involved in each WP, at the same time all HIRMEOS partners are well-networked and mature players in their respective fields. Therefore they have to be well informed about the developments of the project and the surrounding landscape. The connection with OPERAS, the DARIAH network at large and OpenAIRE is very important for the dissemination of HIRMEOS' outcomes.

Relevant News of HIRMEOS: Technical implementations; new tools and services; best practice guidelines; community feedback, conferences and other liaison activities.

Channels to be used in order to reach them: SLACK; emails; internal Meetings; website;
Assessment and Feedback: Direct networking and meetings.

3.2 Academic Community (HSS)

3.2.1 Senior Faculty Members
Description: Established professors and other senior HSS scientists

Relevant news of HIRMEOS: New services and tools improving researching and teaching with open access research monographs in digital format; events, workshops and training for the new tools; use cases; community feedback and best practice guidelines.

Importance: Very High. They are creators and users of research monographs at the same time, while also gatekeeper, opinion leader and multipliers within their fields that have a strong influence on their junior colleagues. They play a major role on rejection, disregard, interest or uptake of new practices and technologies. Therefore, increasing their acceptance of OA research Monographs will have a strong impact on the success of HIRMEOS.

Channels to be used in order to reach them: Direct networking; roundtables; liaison activities; website; newsletter; social media; scientific publications; conference presentations; dissemination Toolkit (poster, flyers).

Assessment and Feedback: Roundtables, reviews of monographs published on HIRMEOS' platforms.

3.2.2 Junior Scholars and Academic Students

Description: B.A. M.A, Ph.D Students, Post-Doc, research Assistants, Research Training Groups.

Relevant news of HIRMEOS: New services and tools improving learning, researching and teaching with digital research monographs; events; workshops; training for the new tools; use cases, best practice guidelines.

Importance: Very high. Like senior faculty members (s. above), but potentially still more important because more familiar with digital tools and the methods of digital monograph publishing.

Channels to be used in order to reach them: Direct networking; roundtables; liaison activities; website; newsletter; social media; scientific publications; conference presentations; dissemination toolkit (poster, flyers).

Assessment and Feedback: Workshops, feedback through the website,

3.2.3 Scientific Societies, Deans, Heads of Department:

Description: Societies related to topics of HSS; faculty members with management duties.

Relevant news of HIRMEOS: New services and tools improving researching and teaching with research monographs in digital format; events, workshops and training for the new tools.

Importance: Very High. They are both propagators and multipliers of relevant information for academics.

Channels to be used in order to reach them: Direct networking, roundtables, liaison activities; Website; Newsletter; Publications; Conference presentations; dissemination Toolkit (poster, flyers).

Assessment and Feedback: Roundtables.

3.3 Libraries and Publishers

3.3.1 Libraries; OA publishers
Description: University libraries actively engaged in OS and OA; Publishers producing HSS research monographs in pure gold OA.

Relevant news of HIRMEOS: Overview about HIRMEOS; information about new services and new tools; best practice guidelines.

Importance: Medium High. They are already aware of the potential of digital humanities and OA. They can take advantage of HIRMEOS' enhancements for OA platforms. More publishers could be involved in the network of HIRMEOS' Platforms.

Channels to be used in order to reach them: Dissemination toolkit (poster, flyers); website; social media

Assessment and feedback: Website

3.3.2 Commercial Publishers:

Description: Commercial Publishers which do not publish research HSS monographs in OA or only in green OA.

Relevant news of HIRMEOS: Overview about HIRMEOS; Information about new services and new tools; Best practice guidelines.

Importance: Medium. The dissemination of their products could take advantage of HIRMEOS' platforms but they are committed to traditional financial models which do not allow them to embrace full OA.

Channels to be used in order to reach them: Dissemination Toolkit (poster, flyers); website; social media

Assessment and Feedback: Website

3.4 Other Projects and Networks related to OA

Description: EU Projects and research Groups related to OS, OA and Digital Humanities

Relevant news of HIRMEOS: Overview about HIRMEOS; Information about new services and new tools; Best practice guidelines.

Importance: Medium. A well-structured synergy should improve the impact of HIRMEOS.

Channels to be used in order to reach them: Website; Social media; newsletter; scientific publications; dissemination Toolkit (poster, flyers).

Assessment and Feedback: Social networks; workshops.

3.5 Local, National and EU Policy Makers & Funders

Description: Decision Makers of governmental and funding agencies: National Research Councils, Foundations supporting research and publishing in HSS

Relevant news of HIRMEOS: Overview about HIRMEOS. Information about the benefits for scholars and other stakeholders. Social-economic meaning of HIRMEOS and OA in general

Importance: High / Very High. They provide infrastructure and services in support of implementation of OA policies. Support is needed to strengthen the outcomes of HIRMEOS.

Channels to be used in order to reach them: Direct networking; social media; press releases

Assessment and Feedback: Evaluation of HIRMEOS' Report and other deliverables

3.6 IT Providers, Start-ups and SMEs

Description: IT solutions providers and new tech start-ups developing software products, tools & apps for the monographs in the OS paradigm

Relevant news of HIRMEOS: Overview about the technical development of HIRMEOS; Overview about needs of scholars and students

Importance: Medium. Exchange with this community could help to enhance the technical implementations of HIRMEOS.

Channels to be used in order to reach them: Social media; dissemination toolkit (poster, flyers); conference presentations.

Assessment and Feedback: Workshops

3.7 Media and General Public

Description: Media, particularly those spending attention to OS, OA and academic policy in general.

Relevant news of HIRMEOS: Overview about HIRMEOS; Information about the benefits for Researcher and other stakeholders; Social-economic meaning of HIRMEOS and OA in general

Importance: High. Decision Makers have to cope with the public opinion and this is still mainly made through traditional news media. Actually, there are in some parts of the European press ideological resistances against OA, which HIRMEOS must deal with.

Channels to be used in order to reach them: Press releases; publications social media

Assessment and Feedback: Publication of articles following HIRMEOS press releases

4. Communication and Dissemination Strategy

4.1 Objectives

The main objectives of the HIRMEOS communication and dissemination strategy are related to:

- Understand the full life-cycle and landscape of the scholarly monograph as an important form of communication for book-oriented disciplines against the backdrop of Digital Humanities (DH), Open Access (OA) and Open Science (OS).
- Identify disciplines with low uptake in DH, OA and/or OS and possible roads for change;
- Identify communities already experimenting or implementing DH, OA, OS;
- Involve stakeholders and target groups to gather input and evaluate services;
- Promote the services and platforms developed by HIRMEOS;
- Bring forward Open Science and Open Access in the disciplines with low uptake
- Create a strong and recognizable brand for the project, identity and key messages to be used on all dissemination material;
- Generate positive media coverage for the project at a local, national, European and global level;
- Support sustainability and visibility of the research results even after the project's lifetime.

4.2 Multilevel Approach

HIRMEOS Dissemination aims are set on **5 different levels**:

Level 1: Within HIRMEOS consortium

Level 2: Within own Organization & Networks

Level 3: Towards core target groups through direct networks

Level 4: Towards other stakeholders and decision makers in the field of the project

Level 5: Towards other countries and sectors

The following **issues and messages** will be disseminated:

- Current developments
- Achieved results
- Achieved milestones
- Published deliverables and other publications, like scientific articles
- Attended events and own events, like the WP Leaders meeting
- Other important incidents

5. Communication Channels and Dissemination Activities

5.1 HIRMEOS Website

The project website – http://www.hirmeos.eu – is a fundamental element of HIRMEOS communication and dissemination strategy. It informs all the stakeholder communities around the mission and development of HIRMEOS project and provides regular updates on relevant events and planned activities. It will also contain links to relevant publications and to other OA projects.

A first neutral version of the website will be available at the end of month two. Logo and other elements of design which defines the core identity of HIRMEOS project will be added after the realization of the dissemination Toolkit in month 5. The website is built with the web content manager Wordpress and a Google Analytics snippet will be coded into the website, so that it will be possible to monitor the usage of the website
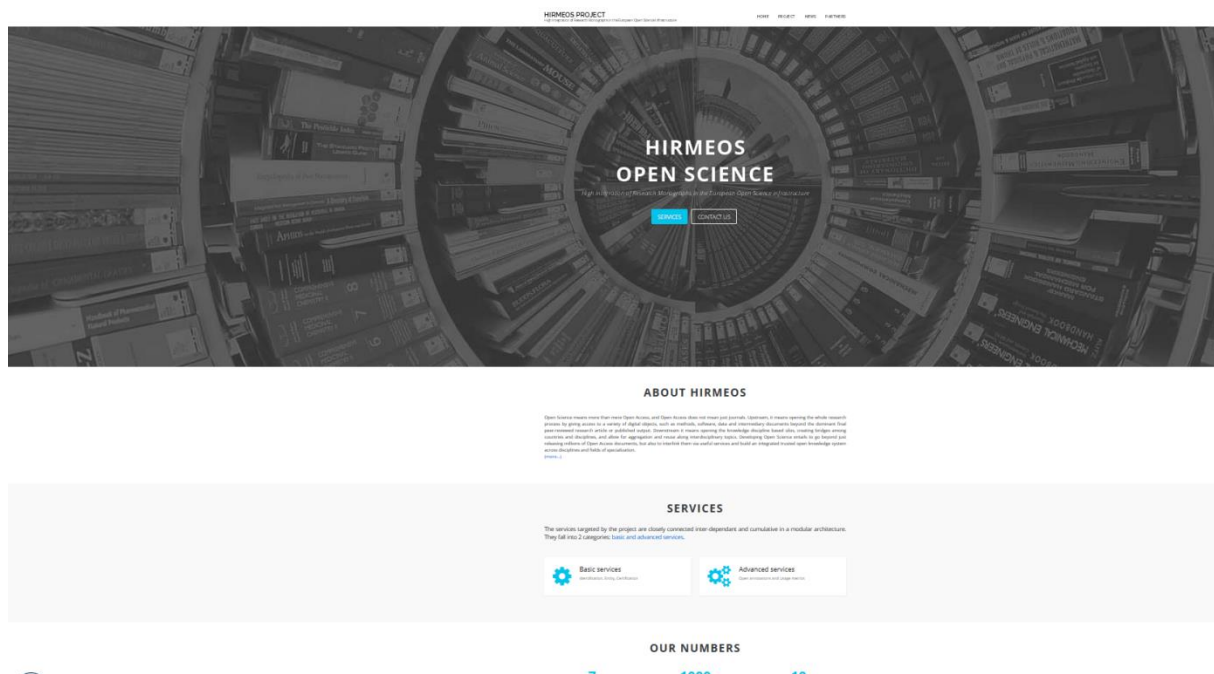
5.2 Social Media

HIRMEOS will take advantage of different social networks. Member of the Consortium will use the following media in order to disseminate innovations and events of HIRMEOS: *Twitter, LinkedIn, ResearchGate, Academia.edu*. This media will guarantee an essential presence of HIRMEOS project in the web and increase public awareness in the Open Science community.

What to announce

- **News / Newsletter / Project articles:** these should be retweeted as much as possible.
- **Technical implementations:** Any updates to the services and tools implemented on the five platforms connected in HIRMEOS
- **New publications**: new research monographs in HSS published on the platforms of HIRMEOS.
- **External news:** Any global updates to policies and infrastructures, Scholarly information topics, Research data management

5.3 Mailing List and Newsletter

A Newsletter about developments of HIRMEOS, related events, publications and presentations concerning Open Access and Open Science in HSS will be started after the development of the official Logo of HIRMEOS and of the Dissemination Kit. It will be sent *every two months*. On the website Hirmeos.eu we will add the possibility to subscribe to HIRMEOS mailing list. We will work towards a population of the mailing list also through the networks of OPERAS, Dariah and OpenAIRE.

Every WP Leaders should come up with a news item every month before the publication of the newsletter (so in M 5, 7, 9, 11, 13, 15, 17, 19, 21, 23, 25, 27, 29). The news sent to the WP7 leader, who selects and edits them in a structured document designed according to the core identity of HIRMEOS. The News editor chooses what goes into the newsletter.

5.4 Events

5.4.1 Organization of Roundtables and Workshops

HIRMEOS WP7 will organize a differentiated program of joint events like conferences, workshops, presentations, round tables.

Direct networking with stakeholders like senior and young scholars will particularly, but not exclusively, concern German institutions related to UGOE. (see list in Appendix). The continuous exchange with these stakeholder communities will permit to organize some round tables focussing the specific needs of the different scholars in HSS.

The HIRMEOS Consortium has a budget for the organization of workshops and similar events. These Workshops are planned and discussed with the other WP leaders. Over the forthcoming 28 months we will organize at least 4 Workshops in order to present new services and tools implemented on the five platforms of HIRMEOS, so as some best practice guidelines. The first Workshop will take place in September 2017 and focus on the implementations concerning *Recognition* and *Identification services*; we are exploring the possibility of organizing this event immediately after the second meeting of the HIRMEOS' WP Leaders in Berlin. A second Workshop will concern the technical developments in *Annotation* and should take place before the realization of deliverable D. 5.1 (due in month 14), in order to receive some feedbacks from the academic community.

A third Workshops – approximatively after month 23 - will present the new tools and methods for *certification* and *metric* (deliverables D 4.4 and D 6.3). A fourth Workshop should take place after the conclusions of all technical implementations and present specific use cases and best practices for the users of monographs published on the platforms of HIRMEOS.

At least the following workshops are to be organized:

Workshop	Location	Date	Goal
WS1	Berlin	September 2017	Informing about tools and services for Identification and recognition implemented on the five platforms
WS2	To be defined with the other WP Leaders	Before Deliverable D4.4 (Due date Month 17)	Getting feedback from academic community for the certification service implemented at partner level
WS3	To be defined with the other WP Leaders	After deliverables D 5.1 (due in M 14) and D6.3 (due in M 23)	Presenting new Annotations service and metrics
WS4	To be defined with the other WP Leaders	After deliverable D 7.3 (due in M 25)	Presenting how HIRMEOS' tools and services improve research activity. Discussion of a concrete use case. Best Practice Guidelines

5.4.2 Participation in External Events

Active participation in external events (conferences, workshops, symposia and so on) will increase the contact to the key stakeholders. The member of WP7 and, with minor effort, the other members of the consortium will give conference and poster presentations or will participate as discussant to roundtables in order to present mission and outcomes of HIRMEOS project.

Some relevant Events (only for 2017, the list has to be updated in the course of the project):

Name of event	Location	Date
A Transition to Fair Open Access	Leiden	April 7
First Conference Workshop of the Association of European University Presses (AEUP)	Stockholm University Library	Mai 16-17
Open Access: Publisering og arkivering av forskning	University of Bergen, Bergen, Norway	June 1
DHBENELUX CONFERENCE 2017	Utrecht, Niederland	3-5 July
21st International Conference on Electronic Publishing	Limassol, Cyprus	June 6 - 8
CERN Workshop on Innovations in Scholarly Communication	Geneve, Switzerland	June 17-19
LODLAM 2017	Venice, Italy	June 28 - 29
46th LIBER Annual Conference	University of Patras (Greek)	July 5 - 7
Open-Access-Tage 2017	Dresden	September 11-13
9th Conference on Open Access Scholarly Publishing	Lisbon	September 20-21
FORCE 2017	Berlin	25-27 October

6. Dissemination Materials

6.1 Dissemination Toolkit

With the Dissemination Toolkit (D.7.2, due in months 5) will be created a set of dissemination materials. Poster and Flyers will be available for download from the project website. Its content is developed for multipliers to support their efforts to contribute to the project's aims and activities. Dedicated content will be provided to liaison partners who will multiply the project's efforts and ensure wider reach and impact. The following resources will be created:

- Logo
- Letterhead
- Factsheet
- PowerPoint template
- Word deliverable template
- Flyers (Three different versions: Students; Researchers; EU Project Coordinators)
- Poster

6.2 Press Relations

In order to increase the impact of HIRMEOS and obtained good press coverage some press release will be prepared. The first press release will be published after Month 5, as soon as the dissemination kit will be available.

6.3 Publications

WP 7 will work on two scientific papers to be published in academic journals. The first will concern NERD's meaning for research Monograph; the second will be about the impact of HIRMEOS project on the research activity. Targeted will be renowned, peer reviewed journals like *International Journal of Humanities and Arts Computing*; *Digital Humanities Quarterly* or *Digital Scholarship in the Humanities*

7. Feedback and Evaluation

The effectiveness of HIRMEOS' dissemination and communication strategy will be regularly measured. All partners will contribute to the implementation of the communication plans.

The performance targets are the following:

Indicator	Quantity
Total Number of website visitors	2000
Number of EU countries reached through website	28
Number of contact in the mailing list	300
Number of twitter followers	200
Workshops	4-5
Conference Presentations	9-10
Roundtables with scholars	4-6
Number of scientific societies reached per direct networking	50
Number of Press releases	5
Newsletter	13
Number of published papers	2

8. Dissemination timeline

Dissemination Roadmap								HIRMEOS																						

Dissemination Material	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30
Poster	█	█	█	█	█																									
Flyers	█	█	█	█	█																									
Portal Updates		█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█
Factsheet	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█
Dissemination Kit	█	█	█	█	🟥																									
Workshops and Liaison Activities																														
Roundtables	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█
1st Workshop									█																					
2nd Workshop																*														
3rd Workshop																								*						
4th Workshop																										*				
Dissemination Channels																														
Newsletter						█		█		█		█		█		█		█		█		█		█		█		█		█
Social media	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█
Press Release			█							█								█							█					█
Scientific papers	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	🟥	█	█	█	█	🟥

*Date yet to be decided

9. Conclusion

This document presents the dissemination strategy and the key stakeholder communities for the HIRMEOS project. Coordination of the activities will be done by UGOE, but the support of all other partners is essential to fulfilling this plan.

The kick-off of HIRMEOS in January 2017 provided a chance to discuss with the member of the consortium some needs and requirements. According to the feedback that we will receive through Website and direct networking with our stakeholders, we could modify the dissemination and communication strategy in order to better fit the requirements of the different communities, above all for what concerns the specific content of the planned workshops.