
Dissemination Plan InRoad

Communication, networking and stakeholder engagement activities





synchronising research infrastructure
roadmapping in Europe

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1. Introduction

The Dissemination Plan of InRoad is the master document covering main dissemination actions and activities planned for the project in order to widely spreading project goals, expectations, outputs and results to the general public and, above all to identified project stakeholders.

The dissemination strategy designed will be mainly oriented to the specific group of experts and stakeholders expected to be engaged by the project, including representative of national (and regional) authorities responsible for designing and developing RI policies as well as elaborating national RI roadmaps, funding agencies financing RI or RI managers and operators. The dissemination strategy will be built on the following relevant cornerstones:

- The analysis and identification of major project stakeholders to assure the circulation of project findings, outputs and results to the right group of experts.
- The organization of networking activities, including several project workshops and a final conference, to foster interaction and exchange of ideas and practices among experts both internal and external (identified stakeholders) to the project.
- The design, implementation, maintenance and update of the InRoad website, which is the principal passive dissemination tool of InRoad project (including project activities, events, results, outputs) as well as a hub of RI information and news.
- The elaboration of dissemination materials such as Press Releases, Newsletters, Reports or Policy Briefs, which will be duly circulated to main project stakeholders on due time.
- A monitoring and assessment process carried out by the dissemination WP leader and InRoad project coordinator in order to ensure that dissemination strategy is working according to the initial plan.

Following this introduction (**section 1**), a detailed explanation about InRoad purpose and objectives (**section 2**) and InRoad main expectations (**section 3**), is introduced.

Section 4 of this document covers the different networking activities planned in the project, which are considered key activities for strengthening links among project participants, setting new links with other related projects, networks and actions and, finally, to disseminate results from workshops, the final conference and the project in general.

Afterwards, **section 5** briefly describes the target audience of InRoad project and the main groups of relevant stakeholders to achieve solid project results and impacts.

On its side, **section 6** includes the most important dissemination activities planned for InRoad project and provides information on key aspects about it, such as *what* to disseminate, the time planned to do it (*when*), the responsible project participants leading the different dissemination actions (*who*), the group of experts being targeted and involved (*to whom*), and finally, the approach, method or way to disseminate the project findings and results and reach the audience (*how*).

Some examples of stakeholders to be engaged by InRoad are then provided and categorized in different groups and subgroups in **section 7**. The stakeholder analysis carried out in this section includes now concrete examples of project stakeholders already identified.

The monitoring and assessment plan to manage and supervise the correct performance of the different elements of the dissemination strategy of the project are presented in the **section 8** of this document. Some methods and tools facilitating the supervision of the dissemination actions are also provided.

To conclude, **section 9** presents two tables summarizing all the Deliverables and the Milestones related to the dissemination WP of InRoad.



2. InRoad Purpose and Objectives

Research Infrastructures (RI) is an essential part of the Research and Innovation (R&I) system in bringing together different stakeholders ranging from Public Research Organizations (PROs), industry and governments in order to jointly work on scientific and technical challenges that contribute to the EU's development and prosperity. Normally, decisions on their implementation are usually based on first ideas and requirements from the scientific communities supported by a long process of strategic priority setting, planning and design. According to H2020 Work Programme, Research Infrastructures¹ "are facilities, resources and services that are used by the research communities to conduct research and foster innovation in their fields. They include major scientific equipment (or sets of instruments), knowledge-based resources such as collections, archives or scientific data and e-infrastructures such as data and computing systems and communication networks. Such infrastructures may be 'single-sited', 'virtual' or 'distributed'".

RI needs not only high initial investments but also long-term funding requirements for operation, and even though they are considered a key component of the European Research Area (ERA), their financial environment is under pressure because of the recurring economic crisis in Europe and other advanced economies. This has already been recognized at European level and even stated in the 2014 European Research Area progress report: "there is a need for further synchronisation of national and European roadmaps for RI and the related pooling of funding" in order to guarantee the sustainability of European RI. However, the issue goes beyond the mere synchronisation of national priority-setting processes (i.e. 'roadmapping') but calls for considering the whole life-cycle of an RI in this processes, the efficient integration of other funding streams such as the European Structural and Investment Funds (ESIF) – where appropriate – and the development of adequate business models for the construction and operation of RI.

In 2002, the European Strategy Forum on Research Infrastructures (ESFRI) was established, with the mandate from the European Council to support a coherent and strategic approach to policy making on RI in Europe and to facilitate multilateral initiatives leading to the better use and development of RI, at EU and international level. In 2004, ESFRI was mandated to establish a European Roadmap for RI including new and major upgrades such as RI of pan-European interest for the incoming 10-20 years, to stimulate the implementation of these facilities, and the regular update of the Roadmap as the need arises. The conclusions of the 2007 Competitiveness Council called the EU Member States (MS) to develop and strengthen national roadmaps for RI in accordance to the orientation given by ESFRI. The ESFRI process stimulated the convergence of national RI roadmapping procedures and priority setting in several EU Member States (MS) and Associated Countries (AC) to the EU Framework Programmes during the last 10 years.

A majority of MS and AC have conducted – in some cases several times already or are now conducting – a strategic prioritisation exercise at national as well as sometimes regional level. Procedures depend on the strategic and political objectives of the exercise and on the requirements of the national decision-making processes, including those of national budget regulations. The results are very diverse in scope and there is not only a mismatch between strategic priority-setting exercises for RI between the European, national and regional levels, but there is as well a great diversity of funding instruments and cost models across countries and regions. As soon as the RI are gaining an European scope, this diversity brings the risks of making the funding of construction and operation of RI across Europe inefficient and not transparent for the communities of users. In other words, the lack of comparability and synchronisation challenges the sustainability and effectiveness of RI.

In order to improve the comparability and synchronisation of RI priority-setting procedures and to reach a better understanding of mutual ex-ante and ex-post evaluation mechanisms, Inroad supports the exchanges of best practices for national and European roadmap drafting and evaluation procedures for RI. The main objective of the proposal is thus to contribute to a better harmonisation and synchronisation of priority-setting, funding and lifecycle management of RI through the exchange of best practices among the main stakeholders in EU

¹H2020 Framework Programme Regulation No 1291/2013 - Article 2(6).



MS and AC and at European level. The regional dimension will explicitly be taken into account by integrating smart specialisation strategies in the work carried out.

More specifically, InRoad project aims:

- Identify and share best practices and common trends of National RI roadmapping Procedures (NRIRMP) and of ex-ante, interim (monitoring) and ex-post evaluation of RI in Europe, leading towards the synchronisation and the possible harmonisation of those procedures in European countries and European level;
- Support RI policy development in MS, AC and at European level by establishing a trustful dialogue and an intensive exchange of information about national RI roadmapping procedures, monitoring and evaluation and sustainable approaches for RI, in line with the ERA objectives;
- Contribute to the emergence of sustainable approaches for RI by conduction of case studies of RI funding models along the whole lifecycle and assessment of best practices of business cases in terms of cost efficiency;
- Foster a dialogue with the European Commission (EC) and all relevant stakeholder organisations in order to validate the project findings and promote the dissemination of its recommendations.



3. Project Expectations

The InRoad project considers that improving the assessment, the accountability and the harmonisation of evaluation procedures of RI is essential for building an effective and sustainable European RI landscape. Its major impact will be a closer alignment of strategies and evaluation practices for RIs at national, European and global levels and thus, the establishment of more effective RI scenery. It is not the intention of InRoad to interfere with each national process of roadmap elaboration, but rather to promote the exchange of best practices and come to more common methodologies and approaches.

The InRoad project will support RI policy development by providing important findings, engaging with key stakeholders and recommending best practices in order to promote comparability and synchronisation of national procedures and a possible harmonisation of ex-ante, monitoring and ex-post evaluation mechanisms for a more effective investment in, use and share of RI in Europe.

Expected impacts to be fulfilled together with the corresponding measures to be developed by InRoad project are listed in the following:

Strengthen the development of a consistent and dynamic ERA policy for RI

- Support the better alignment of national RI roadmapping processes with the ESFRI roadmap and, where relevant, smart specialisation strategies.
- Promote the interoperability of regional, national and European programmes to help combine funds from different sources.
- Support the participation in and the hosting of large pan-European RI by less-favoured regions.

Facilitate the exchange of experiences and good practices between the national and/or regional policies and programmes

- Start and follow-up a dialogue at regional, national and European level with key policymakers, research funding organisations and evaluation bodies to identify best practices for national RI roadmapping procedures, funding models and business models for RI.
- Promote comparability and synchronisation of national procedures and a possible harmonisation of ex-ante and ex-post evaluation mechanisms in close cooperation with the relevant key stakeholders.

Encourage the pooling of resources between infrastructure operators at European level in order to face the grand challenges and to foster a culture of co-operation between them, spreading good practices and encouraging infrastructures to develop in complementary ways

- Ensuring that the operators of the RI are actively engaged in the project and contribute with their expertise on the practical implementation of pooling of resources and the requirements needed.
- Fostering a culture of co-operation between the facilities, spreading good practices and encouraging infrastructures to develop their skills in complementary ways.
- The identification of best practices of RI business models by means of carefully selected case studies will have the potential to promote an economic rationalisation of stronger specialisation and common services for RI.

Enhance partnerships between policy makers, funding bodies, academia and industry and promote the development of appropriate monitoring tools for



decision making

- The composition of the InRoad consortium in itself already ensures a strong collaboration.
- The letters of support collected shows that InRoad has succeeded in engaging most of the key stakeholders at national level and beyond, e.g. ESFRI.
- The organisation of several workshops in order to discuss and validate the outcomes of the work carried out in the project as well as to promote best practices, common trends and recommendations.
- The *Definition Workshop* at month 3 will allow a first discussion with the Advisory Board and the initial members of the Reflection Group.
- The *Engagement Workshop* at month 13 where the first findings will be discussed.
- The *Validation Workshop* at month 21, which will allow the validation of the findings of the project.
- The *Final Conference* planned in parallel to ESFRI/eIRG plenary session, where the results of the project will be ultimately discussed and widely disseminated.
- All workshops will include policy-makers, funders and RI managers, which should help to get additional impact in the sense that it will allow bringing together different viewpoints to confirm the relevance of best practices among the different communities.

Contribute to the emergence of sustainable approaches for the provision of cross- disciplinary research services

- Performing case studies on combining funding streams across borders and good practices on business plans, since these enhance functional closer collaboration of RIs across borders and across disciplines.
- By considering NRIRMP and RI evaluation methodologies across the whole RI lifecycle, InRoad contributes to sustainable RI.

Contribute to the development of a competitive high performance ERA in the global research environment

- The Validation workshop at month 21, which will allow the validation of the findings of the project and a further refinement of the common methodological framework for the harmonisation and synchronisation of ex-ante and ex-post evaluation procedures of RI.
- Developing a better understanding of the business plan by the managers and the owners of RI that strives for well-functioning RI, efficient operations, continuous maintenance and timely upgrades of instrumentation and/or operational modes for a competitive high performance ERA.
- Involving the managers and owners of RI who are key stakeholders in the InRoad analyses and workshop discussions towards long-term consolidation of resources for a high-level infrastructure and a competitive high performance ERA.

Enhance the role of the EU and develop cooperation and engagement with international organisations and multilateral fora.

- Increasing the coherence of the EU-policy regarding the integrated vision on the necessary RI facilities to meet the global challenges with the recommendations that emerge through the InRoad questionnaire, case studies, and workshop discussions.

Contribute to capacity building and research infrastructures human capital



development in targeted/relevant regions

- Bringing together the different European and national bodies responsible for NRIRMP, funding organisations and RI hosting institutions or operators and engaging them in a dialogue on RI roadmap drafting and procedures, RI evaluation methods and criteria (WP3), sustainable funding models (WP4), cost-calculation and business models (WP5).
- Considering the regional dimension in WP4 and thus the European Structural and Investment Funds, InRoad will explicitly address the 'spreading excellence and widening participation' dimension of the ERA. Progress in this area further contributes to integration and the development of an inclusive and dynamic ERA.

Table 1: Overview of project's expected impact and corresponding measures



4. Networking Activities

Since RI policy in Europe is strongly determined at national level and by a myriad of stakeholders, a major activity of the project is focusing on involving key national stakeholders on RI priority-setting, evaluation and roadmapping procedures in Europe and engaging them in an exchange and validation on best practices. From the beginning of the project, InRoad has intended to extend the partnership by including additional stakeholders in the so-called 'Reflection Group' (RG), an expert and skilled group consisted of representatives of the main bodies and stakeholder organisations involved in funding, priority setting or evaluation of RI as well as representatives of relevant RI from all around Europe.

In addition, the project will organise a series of networking activities, mainly three workshops and a final conference to interact with and engage regional, national and European policy makers and stakeholders involved in national decision-making and evaluation practices for research RI and better disseminate project results. The table below provides brief information on the workshops and the conference planned during the InRoad project life.

Timing	Title	Workshop Purpose	Participants	Expected Outputs
1st Workshop 3 rd month from project start	<i>Definition Workshop</i>	Agreement of common terminologies and definitions for project	<ul style="list-style-type: none"> • Project Consortium • Advisory Board • Reflection Group • External Experts <i>Approx. 60 participants</i>	<ul style="list-style-type: none"> • Workshop report • Press release
2nd Workshop 13 th month from project start	<i>Engagement Workshop</i>	Discuss and refine project findings and results	<ul style="list-style-type: none"> • Project Consortium • Advisory Board • Reflection Group • External Experts <i>Approx. 60 participants</i>	<ul style="list-style-type: none"> • Workshop report • 1st Policy Brief • Press releases?
3rd Workshop 21 st month from project start	<i>Validation Workshop</i>	Discuss and refine project findings and results	<ul style="list-style-type: none"> • Project Consortium • Advisory Board • Reflection Group • External Experts <i>Approx. 60 participants</i>	<ul style="list-style-type: none"> • Workshop report • 2nd Policy Brief • Press release
Final Conference 24 th month from project start	<i>InRoad Final Conference</i>	Wide dissemination of projects results	<ul style="list-style-type: none"> • Project Consortium • Advisory Board • Reflection Group • External Experts <i>Approx. 60 participants</i>	<ul style="list-style-type: none"> • Conference report • Press release

Table 2: Overview of networking activities during the project lifetime

By engaging with the Reflection Group in the three workshops, Inroad will promote the dissemination of its results and the uptake of best practices across Europe.

The *Definition*, *Engagement*, and *Validation* Workshop will target all stakeholders in the RG. The Validation workshop will be used to validate the project findings, come to an agreement



on best practices and discuss and consolidate the project recommendations.

Networking activities planned in the project together with dissemination and communication actions, tools and materials, should also serve to establish links with other FP7 and H2020 related projects, networks and other global, pan-European, EU or national actions involving, for instance, national contact points (NCPs) and European representatives at Universities and research organisations.

Additionally, there will be a series of regional workshops at the end of 2017 and in 2018.

5. Target Audience

InRoad project outputs and results are intended to have a high impact mainly on decision makers involved in RI priority-setting, evaluation and roadmapping procedures, especially at national level. Therefore, InRoad is expected to produce and provide interesting and key information on the latter issues mainly for a variety of experts and professionals related to RI and allied issues. The table in the following summarizes the main groups of people with a potential interest in InRoad project results and outputs as well as the impact extent or level which is expected for each of these groups.

AUDIENCE	Relevance degree for achieving project impact
Government bodies in charge of planning, designing and elaborating national RI roadmaps.	*****
National authorities responsible for designing and developing RI policies.	*****
Funding agencies making important decisions on investments and financing of RI.	****
Regional agencies responsible for elaborating the research and innovation policies for their regions.	****
RI executive board, managers and operators	**

Table 3: Overview of InRoad's target audience



6. Dissemination Activities

An overview of dissemination activities planned for the InRoad project is covered by the matrix below, which includes the different actions or outputs to be disseminated (what to disseminate), when accomplish them, the partners in charge of each action, the group of stakeholders to be targeted and how to approach the dissemination. This matrix aims to summarize the specific dissemination activities to be conducted when relevant actions of the project are achieved or delivered.

WHAT	WHEN	WHO	TO WHOM	HOW
1. Project objectives, scope, and expected results	Month 1	SNSF; INNOVATEC ; Other Participants	<ul style="list-style-type: none"> Identified Project Stakeholders 	<ul style="list-style-type: none"> Flyer/Brochure Mailing List Press Release Project website Social Networks
2. Definition workshop results	Month 3	SNSF; INNOVATEC ; Other Participants	<ul style="list-style-type: none"> Advisory Board Project Consortium Reflection Group 	<ul style="list-style-type: none"> Direct Contact Mailing List Social Networks
3. Launching of the project website	Month 3	SNSF; INNOVATEC ; Other Participants	<ul style="list-style-type: none"> Advisory Board Project Consortium Reflection Group Related Projects 	<ul style="list-style-type: none"> Direct Contact Mailing List Social Networks
4. Engagement Workshop results	Month 13	SNSF; INNOVATEC ; Other Participants	<ul style="list-style-type: none"> Advisory Board Project Consortium Reflection Group Identified Project Stakeholders 	<ul style="list-style-type: none"> Mailing List Newsletter Press Release Project Website Policy Brief Social Networks
5. Validation Workshop results	Month 21	SNSF; INNOVATEC ; Other Participants	<ul style="list-style-type: none"> Advisory Board Project Consortium Reflection Group Identified Project Stakeholders 	<ul style="list-style-type: none"> Mailing List Newsletter Press Release Project Website Policy Brief Social Networks
6. Final Conference Announcement	Month 21	SNSF; INNOVATEC ; Other Participants	<ul style="list-style-type: none"> Advisory Board Project Consortium Reflection Group Identified Project Stakeholders General Audience 	<ul style="list-style-type: none"> Mailing List Newsletter Press Release Project Website Social Networks
7. Final Conference Results	Month 24	SNSF; INNOVATEC ; Other Participants	<ul style="list-style-type: none"> Advisory Board Project Consortium Reflection Group Identified Project Stakeholders General Audience 	<ul style="list-style-type: none"> Final Report Mailing List Newsletter Press Release Project Website Social Networks

Table 4: Overview of InRoad's planned dissemination activities



7. Stakeholder Analysis

InRoad has planned specific activities to engage new potential stakeholders interested to keep informed or even to participate in project activities like Workshops or the Final Conference. A first list of stakeholders of InRoad project has been identified and can be displayed in the following table. In order to facilitate their identification we have structured the list according to the type of organization which they pertain.

GROUP	SUBGROUP	STAKEHOLDERS
ESFRI	ESFRI Delegates(Member States)	<ul style="list-style-type: none"> • ESFRI Delegate of Austria • ESFRI Delegate of Belgium • ESFRI Delegate of Bulgaria • Etc.
	ESFRI Delegates (Associated States)	<ul style="list-style-type: none"> • ESFRI Delegate of Albania • ESFRI Delegate of Bosnia and Herzegovina • ESFRI Delegate of Iceland • Etc.
	StR-ESFRI Project Partners	<ul style="list-style-type: none"> • Science and Technology Facilities Council, STFC • The University of Milan • Research and Innovation Center in Information, Communication and Knowledge Technologies ATHENA • International Bureau of the German Federal Ministry of Education and Research at the German Aerospace Centre
PUBLIC AUTHORITIES	Ministries	<ul style="list-style-type: none"> • Federal Ministry of Science, Research and Economy (AT) • Italian Ministry of Education, University and Research (IT) • Ministry of Science and Higher Education (PL) • Etc.
	Regional Agencies	<ul style="list-style-type: none"> • Regional Development Agency Centru (RO) • South Transdanubian Regional Development Agency (HU) • Reg. Dev. Agency of Western Macedonia – ANKO (GR) • Etc.
	National Funding Agencies	<ul style="list-style-type: none"> • Czech Science Foundation – (CZ) • Danish National Research Foundation – DNRF (DK) • Swedish Agency for Innovation Systems – VINNOVA (SE) • Etc.
	Regional Funding Agencies	<ul style="list-style-type: none"> • Regional Council of Bourgogne (FR) • Regione Puglia (IT) • Flanders Innovation & Entrepreneurship (BE) • Etc.

Table 5: InRoad's stakeholder network

A final list of stakeholders including identification data such as full name, region/country, sector, contact details (mainly, phone and e-mail address), institution, position, etc. will be created, manipulated and continuously updated by the project manager board. Similarly, they will be the responsible for making decisions on the acceptance of new stakeholders according to well-defined criteria previously agreed by project consortium.



8. Monitoring and Assessment

In order to warrant the success and achievement of the different dissemination actions, a variety of solid monitoring measures will be implemented. This will enable to manage possible deviations in the dissemination strategy initially created and control all actions being developed in the corresponding time and form. The partner in charge of conducting the monitoring and evaluation of the dissemination strategies will be the project coordinator (SNSF) with the support of other partners. To do so, the SNSF will be in close contact with the different consortium members responsible of each dissemination task with the aim of ensuring the delivery and completion of the different dissemination outputs and tools as well as the performing and accomplishment of the dissemination measures. Of course, the dissemination plan will be circulated and agreed by all the consortium members prior to its implementation.

Several tools can be used when monitoring the success of the different dissemination actions and tools. For instance, statistical counter integrated in website should be useful to better know about the real impact of a specific dissemination action or tool (as the website itself) in the general public by following-up the number of visitors interacting with concrete website sections for the time period which the specific action was developed in. Moreover, outstanding data on new visitors being potentially interested in taking part of the network, countries of origin, sections visited, time of visits, or the live traffic of visitors can provide a strong idea on how dissemination of project actions is resulting. To take advantage of the website an online registration form will be placed in the network website in order to facilitate new members engaged to keep informed about project events, activities, results, etc...

In relation to events like workshops or the final conference of the project it is important to set a strict control of attendants by making people registering or confirming their availability through online means like e-mail or registration forms. Figures on total number of applications and the real/final number of attendees should not reveal, significant differences when comparing. This fact will point out a good performance in the organization and development of these activities. An overwhelming number of applications for the network could reveal an outstanding interest for project aims, results and outputs. However, it could also reveal a lack of precision for engaging real stakeholders of the network, or in other words, a very exhaustive dissemination strategy.

During the last month of the InRoad project life, coinciding with the last dissemination activities planned for the project, SNSF will carry out an assessment procedure to see the extent which dissemination tools and activities have achieved. This will include the generation of a specific data including:

1. Project website statistics broken down by visitors, countries, sections visited, etc.
2. Number of new stakeholders engaged broken down by sectors and means of registering, i.e. using online registration form, direct contacts, e-mail, etc.
3. Timing matrix covering a brief description of the different dissemination activities and tools carried out by the corresponding partner in charge of it, the achievement of objectives, completion of dissemination actions and availability of dissemination tools on time and due form.



9. Deliverables and Milestones Related to Dissemination

D.N.	DELIVERABLE TITLE	LEAD	TYPE	LEVEL	TIMING
D2.1	<i>Project Website</i>	INNOVATEC	Website	Public	Month 3
D2.2	<i>Project Newsletters</i>	INNOVATEC	Report	Public	Months 6-7, 18-19& 24.
D2.3	<i>Policy Briefs</i>	SNSF	Report	Public	Months 14 & 22.
D2.4	<i>Final Project Report</i>	SNSF	Report	Public	Month 24

M.N.	MILESTONE TITLE	LEAD	TIMING	VERIFICATION
MS2	<i>Project website launched</i>	INNOVATEC	Month 3	Website available online.
MS3	<i>Definition Workshop</i>	SNSF	Month 4	Workshop report and signed list of attendees.
MS4	<i>Engagement Workshop</i>	SNSF	Month 13	Workshop report and signed list of attendees.
MS5	<i>Validation Workshop</i>	SNSF	Month 21	Workshop report and signed list of attendees.
MS6	<i>Final Conference</i>	SNSF	Month 24	Conference report and signed list of attendees.

Table 6: Deliverables and milestones related to the presented dissemination activities

