EOSC-SYNERGY

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Exploitation and Dissemination Plan

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Abstract:

Description of the activities and procedures to be executed in order to maximise the impact of the project and to protect the results, establishing the roadmap for their future exploitation.







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II. Delivery Slip

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IV. List of Acronyms

Acronym	Description
AAI	Authentication and Authorisation Infrastructure
СВ	Collaboration Board
DoW	Description of Work
EAB	External Advisory Board
EC	European Commission
ESFRI	European Strategy Forum on Research Infrastructures
EOSC	European Open Science Cloud
HaaS	Hackathon as a Service





IBERGRID	Iberian Distributed Computing Infrastructure
IP	Intellectual Property
IPR	Intellectual Property Rights
FAIR	Findable Accessible Interoperable Reusable
KOM	Kick-off meeting
KPI	Key Performance Indicator
NIL	National Grid Initiative Liaison Officer
NGI	National Grid Initiative
NREN	National Research and education Network
MOOC	Massive Open Online Course
PDF	Portable Document Format
PMB	Project Management Board
РО	Project Office
SQA	Software Quality Assurance
SQAaaS	Software Quality Assurance as a Service
TIB	Technical Integration Board
TOC	Table of Contents
URL	Uniform Resource Locator
WP	Work Package





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Executive Summary

EOSC-synergy will expand the capacity and capabilities of the European Open Science Cloud (EOSC) by leveraging the experience, effort and resources of national publicly funded digital infrastructures in a coherent way, therefore acting also as an incentive for national resource providers. EOSC-synergy extends the EOSC coordination to nine participating countries by harmonizing policies and federating relevant national research e-Infrastructures, scientific data and thematic services, bridging the gap between national initiatives and EOSC.

This deliverable describes the strategy of dissemination plan and the structures and procedures for the management of innovation activities during the EOSC-synergy project.

The Task T1.3 covers the Innovation Management and Exploitation with the main goal of define and implement an Innovation Management strategy geared towards effective exploitation of the project results.

For this purpose, EOSC Synergy will implement the following activities:

- To capture project results, support the definition of the best IP protection approach, and define and maintain the exploitation plan.
- Definition an innovation management plan with guidelines on how to collect information and defined approaches to.
- Maintain a catalogue of project results to support the definition of the most appropriate exploitation routes. This will feed into the development of the dissemination and exploitation plan.

On the other hand, the general dissemination of EOSC Synergy is gathered in the Task 1.4 Communications, Dissemination and Events of the WP1 Project Management and Exploitation. This task aims to implement the project communications and dissemination activities, focusing on two areas:

- Project-related communications. This will include the definition of the project's identity and key messages, and the development & operation of the project's website and communication channels.
- Communication support for the dissemination and exploitation of results.





1. Introduction

1.1 Purpose

This document is a formal deliverable which records the main actions to be carried out to protect and maximise the results of the project with a collection of procedures and activities in the innovation and exploitation of results and for the general dissemination of the project among scientific and technical communities, stakeholders and society in general.

1.2 Document organization

This document is organised as follows:

- Section 2 describes the Innovation and Exploitation plan, with the main objectives within the project and its integration in the EOSC. Later, the EOSC-Synergy approach for Innovation and Exploitation is explained, defining the boards and task for Innovation Management, the roles responsibilities and procedures.
- Section 3 describes the Dissemination Plan with the strategy and methodology, the main objectives to reach, the landscaping of stakeholders and how to engage them, the channels for communications, the event to be attended and the different tools and procedures that will be used to track and measure the impact.
- Annex 1 contains the table of definitions for Innovation Management
- Annex 2 contains the Background IP
- Annex 3 contains the Branding Kit





2. Innovation and Exploitation Plan

2.1 Introduction

Following the architecture guidelines produced by the project EOSC-hub, the *Figure1* describes the layers that the EOSC portfolio needs to develop. At the core of the Hub is the EOSC core itself, consisting of the practical implementation of the compliance framework. That is, the technical and non-technical policy rules that should guarantee the desired level of integration, *i.e.* basic service interoperability, support to FAIR data guidelines and quality service management procedures.

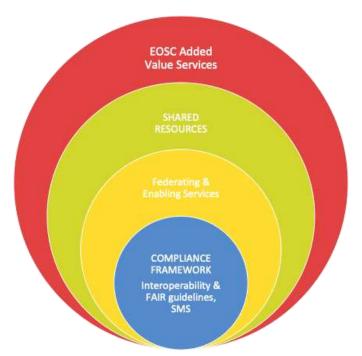


Figure 1. EOSC layers integration according to the EOSC-hub architecture

The target integration level is highly dependent on the particular research community, resource provider, and in general, the stakeholder interested in participating in the ecosystem. As a common denominator, a good starting point to provide an interoperable framework is the implementation of open standards and the systematic adoption of well-defined best practices to deploy and operate services.

In the area of research data repositories, the discussion topics are around which tools are required to implement the level of integration and interoperability necessary to support the guidelines for research data repositories based on FAIR principles.





One layer above, EOSC needs to provide a solution to support an operational framework at European scale that enables the federation of resources. This is clearly so when applied to federating e-Infrastructures, such as computing and storage resources.

The federation of services provides the required support for the layer above: Resource Sharing. Certainly not all the EOSC stakeholders need sharing resources in terms of accessing computing, storage capacity or databases in a trans-national way. However, the fact that those resources have a basic level of federated capabilities (AAI, monitoring, accounting) is the breeding ground to generate an ecosystem of cooperation, which is one of the main objectives of EOSC.

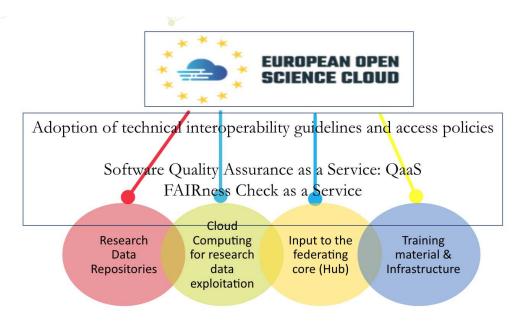


Figure 2. Contributions of EOSC-synergy at the level of the EOSC Federating Core

	EOSC Framework	Federation enabling services (Hub)	Shared Resources	EOSC Added Value Services
Thematic Services			X	X
Service Quality Criteria	X	Х		
National e-Infras Capacity		Х	Х	
Research Data Repositories	Х		Х	Х
FAIR asses. as a service	х		Х	Х
Training	Х		Х	Х

Table 1. Generic areas of contributions of EOSC-synergy to the EOSC-Portfolio





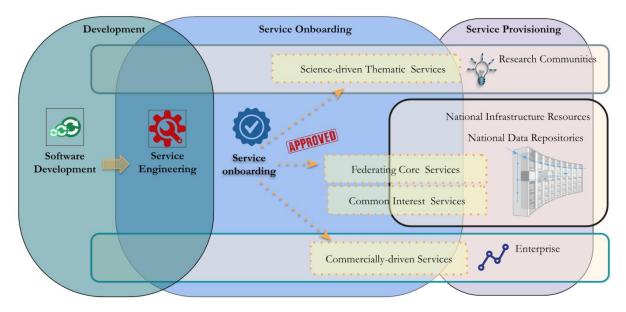


Figure 3. EOSC ecosystem for service development, onboarding and provisioning

2.2 Expected project results

We have catalogued the project results according to the place in the full EOSC ecosystem of services, as depicted in *Figure 3*. In this section we describe the expected exploitable results mentioned in the Description of Work, indicating the categories they belong to as defined in *Figure 2*.

We also identify a number of aggregated project results, these understood as the incorporation of several individual exploitable results in a single product/service with extra added value.

2.2.1 Capacity Building

Capacity building refers to enlarge EOSC with a critical mass of computing and storage resources, and foster service integration in the EOSC, in such a way that those resources and services can be seamlessly exploited. EOSC-synergy builds on, and complements the EOSC-hub project activities by fostering the uptake of the EOSC core functions and horizontal services at national level with the following expected results:





Exploitable result (category)	Description	Involved partners	
R2.1 National Cloud Capacity (Service Provisioning)	Integration in the EOSC federating core (Hub) of a significant Cloud capacity in terms of computing and storage.	KIT, CSIC, LIP, INCD, CYFRONET, PSNC, IISAS, CESNET, CESGA, BIFI, CIEMAT	
R2.2 Research Data Repositories (Service Provisioning)	Integration in EOSC of research data repositories including FAIR assessment.	CSIC, DANS, PSNC, IISAS, KIT, CIEMAT	

Table 2. Expected Results associated to Capability Building (WP2)

2.2.2 Quality Criteria and verification procedures

EOSC synergy push the EOSC state-of-the-art in software and services life-cycle through a quality-driven approach to services integration that will promote the convergence and alignment towards EOSC standards and best practices as described these expected results:

Exploitable result (category)	Description	Involved partners
R3.1 Service Quality verification Platform (SQaS) (Service Onboarding)	Service Quality assessment "as a Service" via open source solutions using the concept of software pipelines. Development of a quality software baseline, along with a badge scheme for software qualification.	LIP, CSIC
R3.2 FAIRness maturity assessment Platform (Service Provisioning)	Service dedicated to FAIRness maturity assessment.	DANS, CSIC, LIP, CYFRONET

Table 3. Expected results associated to Quality Criteria and verification procedures (WP3)

2.2.3 Thematic Services

EOSC Synergy will open national thematic services to European access, expanding the EOSC offer in the Environment, Climate Change, Earth Observation and Life Sciences. Furthermore, the project will expand EOSC's global reach by integrating infrastructure and data providers beyond Europe, fostering international collaboration and open new resources to European researchers. All these thematic services are collected in the following table as part of the expected results of the project.





Exploitable result (category)	Description	Involved partners
R4.1 WORSiCA (Service Provisioning)	European-wide service for the detection of the coastlines changes, coastal inundation areas and inland water bodies	LNEC, IRD, LIP
R4.2 G-Core (Service Provisioning)	The capability of developing add-value products for Earth Observation services through the integration of G-Core as a data manager	INDRA
R4.3 SAPS (Service Provisioning)	SAPS, a service to compute the Surface Energy Balance Algorithm for Land (SEBAL) and similar information for estimating the evolution of forestal masses and crops.	UFCG, EMBRAPA
R4.4 OpenEBench (Service Provisioning)	OpenEBench is a platform for supporting scientific communities-led benchmarking efforts across different domains in Life Sciences. OpenEBench supports scientific communities efforts in benchmarking	BSC
R4.5 Scipion (Service Provisioning)	The integration of Scipion on demand deployment and customisation of processing tools and environments in the EOSC MarketPlace will enable the CRYO-EM community using EOSC integrated resources by a service that automatically produces a cloud instance of Scipion with all the user data loaded.	CSIC-CNB, CESNET
R4.6 SDA-WAS (Service Provisioning)	The integration of the SDS-WAS for modelling of dust transport in the environment in the EOSC	BSC
R4.7 MSWSS (Service Provisioning)	The analysis of water network distribution with regards to the mitigation of hazardous events (MSWSS) by the integration of existing on-line analysis of toxics in drinking water supply networks with distribution network simulation of EPANET in EOSC	IISAS
R4.8 O3AS (Service Provisioning)	The integration of O3AS, a complex workflow comprising novel analysis tools that access Climate Data Archives using EOSC methods	KIT
R4.9 RECETOX (Service Provisioning)	The integration of the untargeted mass-spectrometry analysis from RECETOX to use the EOSC Federated Cloud Backend	CESNET
R4.10 SPEIbase Data Service (Service Provisioning)	The integration of the Standardised Precipitation- Evapotranspiration Index, a multiscalar drought index based on climatic data.	CSIC
R4.11 Etnoarch. Data Service (Service Provisioning)	The integration of the Ethnoarchaelogy in Southern repository within EOSC	CSIC
R4.12 EOS Data Service (Service Provisioning)	The integration of the Spanish Journal of Entomology repository within EOSC	CSIC





R4.13 Earth Science Data Service (Service Provisioning)	The integration of the Earth Sciences datasets within EOSC	CSIC
R4.14 AMUNATCOLL (Service Provisioning)	The integration of the AMU Nature Collections within EOSC	PSNC
R4.15 LAGO Data Service (Service Provisioning)	The Integration of the Latin American Giant Observatory (LAGO) data within EOSC	CIEMAT
R4.16 LANDSAT Data Service (Service Provisioning)	The Integration of the United States Geological Survey within EOSC	UFCG, UPV

Table 4. Expected results associated to EOSC Synergy Thematic Services (WP4)

2.2.4 Policy recommendations to EOSC

EOSC Synergy will contribute to the harmonization and development of policies and best practices for resources provisioning and allocation in the context of the INFRAEOSC-5 regional projects with the following expected results:

Exploitable result	Description	Involved Partners
R5.1 Landscape analysis of EOSC-related national policies and practices	Understanding differences between national policies, the first step towards their harmonization	CESNET, EGI, FCT, CSIC, PSNC, IISAS,DANS, LNEC,JISC
R5.2 Recommendations for the national alignment	Foster harmonization of national policies on resource provisioning, access and allocation	CESNET, EGI, FCT, CSIC, PSNC, IISAS,DANS, LNEC,JISC

Table 5. Expected results associated to EOSC Synergy Policy (WP5)

2.2.5 Capability building

In order to contribute to the capability building, EOSC Synergy will implement a skills development framework to promote EOSC adoption by the research communities. The expected results associated to the training work package are the following:





Exploitable result	Description	Involved Partners
R6.1 Training Platform	A training platform, EOSC-aware, with capabilities to self-deploy training infrastructure for practical exercises.	PSNC, BIFI, CSIC, JISC
R6.2 Hackathon as a Service (HaaS)	An EOSC-aware platform to support events hackathon-type.	BIFI, PSNC
R6.3 Training best practices documentation	Best practices technical trainings (and training resources) on how to create the self-deployable tutorials using provided toolsets and provision	JISC, CSIC
R6.4 Accreditation scheme for training materials and trainers	Procedure to guarantee the quality of training materials	PSNC, BIFI, CSIC, JISC

Table 6. Expected results associated to Capability building (WP6)

2.2.6 Aggregated project results

In addition to the expected results associated to each Work Package, there will be a collection of results arising from the aggregation of several individual results as described below:

Exploitable result	Individual Results involved
AR1 Training infrastructure with capabilities for the user to deploy a testbed infrastructure for self-learning.	Provision of National Cloud Capacity (WP2) Training Platform (WP6) Thematic services provision (WP4)
AR2 Deployment of Research Data repositories "as a Service"	National Data Repositories (WP2 and WP3) FAIRness maturity assessment "as a service" (WP3)
AR3 Thematic Services interoperability assessment "as a Service"	SQAaaS (WP3) Thematic Services integration (WP4) Provision of National Cloud Capacity (WP2)

Table 7. Generic areas of contributions of EOSC-synergy to the EOSC-Portfolio

2.3 Innovation Management across the project

This section intends to visualize the link between Innovation and Exploitation management with other Work Packages and boards of the project.

Summary of Tasks and Deliverables directly related to support, enable, or drive innovation in EOSC-Synergy across the different expected results.





Task	Deliverables	Expected Results
T1.1 Project Management and Coordination T1.2 Project Quality and Risk Management T1.3 Innovation Management and Exploitation T1.4 Communication, Dissemination and events	D1.1 Exploitation and dissemination plan D1.2 Exploitation and dissemination report D1.3 Final exploitation and dissemination report	ALL
T2.1 Integration with the EOSC on the core service level T2.2 Integration on the technical standard level T2.3 Technical integration on the policy level T2.4 Integration of National Research Data repositories	D2.1 Roadmap for integration of national capacities into the EOSC D2.2 Policy gap analysis D2.3 Intermediate report on integration efforts D2.4 Final report on EOSC integration	R2.1 R2.2 R2.3 AR1 AR2 AR3
T3.1 Consolidation of an EOSC Software maturity baseline T3.2 Implementation of an EOSC Service Integration platform T3.3 Implementation of the EOSC FAIR data principles	D3.1 Software maturity baseline D3.2 First prototype of Service Integration platform D3.3 Intermediate report on technical framework for EOSC FAIR data principles implementation D3.4 Final release of Service Integration Platform D3.5 Final report on technical framework for EOSC FAIR data principles implementation	R3.1 R3.2 AR2 AR3
T4.1 Services and Best practices harmonisation T4.2 Thematic services for the EOS community T4.3 Thematic services for the Biomedicine community T4.4 Thematic services for the Astrophysics community T4.5 Thematic services for the environmental community T4.6 Thematic services validation	D4.1 Best practices Elicitation including Data Management Plans D4.2 First prototype of the EOSC Thematic services D4.3 Final release of the EOSC Thematic services D4.4 EOSC Thematic services validation report	R4.1 - R4.16 AR1 AR2 AR3
T5.1 Landscape Analysis T5.2 Gap Analysis and recommendations T5.3 National and international liaisons	D5.1 National / International engagement plan with policy makers and funders D5.2 Landscape and gap analysis and recommendations D5.3 Feedback report on project policy recommendations	R5.1 R5.2





T6.1 Deployment and customization of the training platform T6.2 Methodology and certification of the tutorials T6.3 Interaction with national educational programmes	D6.1Training materials and quality assurance guidelines D6.2 Report on the final release of the customized training platform including the self-deployable tutorials capabilities and Hackathion as a Service platform D6.3 Final report about skills development support activities and related services	R6.1 R6.2 R6.3 R6.4
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Table 8. Relation of task and deliverables with the expected and aggregated project results

2.4 Roles and responsibilities

The table below describes the key roles in the innovation management of the EOSC-Synergy project.

Role	Responsibilities		
WP leaders	 Register project results in the catalogues Ensure that the information is complete and updated Ensure that dissemination and exploitation plans are defined (by result main responsible) 		
(Main Responsible of PR)	In collaboration with WP leader, register information on project result in the catalogue, including exploitation and dissemination plans		
Risk Manager	Reviews exploitation risks and updates the project's risk table		
Innovation Manager	 Validates the list of key results Advises on the best approach to protect Intellectual Properties (IPs) produced during the project Validates a dissemination and exploitation plan Ensures that the EOSC-Synergy service catalogue is updated in case of results intended to be adopted as new services Interface with LIP, leader of Project Quality (T1.2) activities 		
WP1 team	Contributes to validate dissemination and exploitation plans for results		





РМВ		Reviews periodically the list of aggregated results, validates the key exploitable results, and reviews the dissemination and exploitation plan execution
Authors deliverables milestones	of or	Define a dissemination and exploitation plan for every project result in scope

Table 9. Roles and responsibilities in the EOSC-Synergy project.

2.5 Procedures

The Innovation management of EOSC Synergy encompasses the identification of Background IPs required to execute the project, the capture of the Project Results and the management of Exploitation results. For each of these categories we describe the objectives, the actions and outputs that will be generated.

2.5.1 Identifying and capturing background IPs needed for the project

Objectives:

This process has the objective to secure to the consortium the necessary usage rights for the IPs required to operate during the project.

Actions:

The background IPs and 3rd party IPs has been already collected by the project coordinators during the proposal writing and Consortium Agreement Signature.

Outputs:

• Catalogue of background IPs in the consortium Agreement. See also Annex 2.

2.5.2 Capturing and managing foreground IPs (Project results)

Objectives

This process has the objective to capture and manage the foreground IPs (project results), during the execution of the project.





Actions

The table below describes how the information of IP is gathered and the roles involved in the procedures.

Step	Responsible	Action		
1	WP leader in collaboration with Author of deliverables or milestones	Creates/Updates entries in the Catalogue of project results defining the dissemination and exploitation plans for each project result in scope in the deliverable/milestone. If support or clarification are needed, contact the Innovation manager (elisa.cauhe@egi.eu)		
2	Author of deliverables or milestones	In the related Deliverables or Milestones repositories, insert the links to the updated project results and aggregated project results.		
3	Author of deliverables or milestones	Contact Risk manager (jorge@lip.pt) to review the information provided in the exploitation Risk assessment table of aggregate results		
4	Author of deliverables or milestones	Contact Innovation Manager (elisa.cauhe@egi.eu) that entries has been filled in and can be reviewed.		
5	Innovation Manager	The Innovation Manager reviews the information provided in the catalogues and approves the entries, notifying the PMB and WP1.		
6	Innovation Manager and Author of deliverables	In case the information provided in the entries is not sufficient, the Innovation Manager will request further updates to the authors of the deliverables (or milestones) before approval. Author of deliverables (or milestones) will be notified also via email by Innovation Manager.		

Table 10. Actions to capture the Project Results during the project period

The template used for collecting the information in the Project Result Catalogue that will be filled by the WP leaders in collaboration with the Authors of Deliverables is the following.



Type

Owners

Other, not listed above

Owners of the expected result



	The objective of this repository is to capture project results, support the definition of the best IP protection approach, and maintain the dissemination and exploitation plan.	
PROCEDURE: 1. Deliverable/Milestone author adds a new sheet in this document for ear project results with its description according to the table below. 2. Contact Risk manager (jorge@lip.pt) to review the information 3. Inform Innovation manager (elisa.cauhe@egi.eu) about the new result Results Catalogue 4. If needed, Innovation manager will contact Deliverable/Milestone author provide more information. 5. Innovation manager will inform Dissemination manager to disseminate project results		
	Acronym of the project result	
Category	OBJ 1 → Research cloud infrastructure, federated in EOSC OBJ 2 → Data, IaaS and SaaS services for the EOSC portfolio OBJ 3 → Certification and quality auditing scheme at national level for onboarding and controlling national EOSC nodes OBJ 4 → National agencies responsible for EOSC national coordination, supervising the national nodes of EOSC and planning their expansion through procurement actions OBJ 5 → Human networks responsible for support and training pertaining the national EOSC resources and services	
Expected result	Full name of the expected result	
	software and services technical specifications policies and procedures documents and reports business models	





Protection (IPR)	Patent Utility model Industrial Design Copyright Trademark Confidential Information Open Source Open Access Public Domain
IPR Comments	Comments or specific approaches of IPR
Target audiences	Describe who will use the result
Key benefit (for the audience)	Describe the benefit for the target audiences,
Key exploitation paths	Describe how engage with target audiences and how they use / exploit the results: - in further research activities other than those covered by the action concerned - in developing/creating/marketing a product/process - in creating and providing a service - in standardisation activities
Date	Date of registration
URL	Link to the deliverable, repository
Key innovation	Additional information about the project result

Table 11. Template to fill with the Project Results

Outputs

The outputs generated by this process will be the following:

- Project results catalogue
- Table overview of Project results
- Table overview of Aggregated project results
- Input to D1.2 Dissemination and Exploitation report (M15)
- Input to D1.3 Final dissemination and Exploitation report (M15)

2.5.3 Managing Exploitation results

Objectives

The objective of the exploitation management process is to promote the project results and their use to maximise the expected impacts of the call topic.





Actions

Once projects results are identified, it is needed to assess exploitation opportunities and develop an appropriate strategy for its exploitation and protection. If the exploitation opportunity is identified, this Work Package will maintain and elaborate the dissemination and exploitation strategy plan in collaboration with the authors of Deliverables or Milestones, to develop an appropriate business plan(s).

Outputs

- Dissemination and exploitation strategy plan for the exploitable results
- Business plan for the exploitable results





3. Dissemination Plan

3.1 Strategy and methodology

Project Management and Exploitation (WP1) covers the Communication, Dissemination and Events task (T1.4). However, this task is also related with the Alignment of national policies and practices (WP5) where the dissemination and communications with EOSC stakeholders is key to maximize the impact of the project.

Due to the deep relationship with EOSC stakeholders, the first approach of the Dissemination Plan is to map the stakeholders groups and the motivation and ways to engagement them. Then, external communications with the different target audience are described and the events (internal and external) than will take place. Finally a description of the means to measure the impact is described.

3.2 Engagement with EOSC Stakeholders

3.2.1 Mapping the stakeholders

The following table shows the different EOSC stakeholder groups identified and the interest for EOSC Synergy for engagement. A complete map of the EOSC stakeholder analysis will be provided as part of the D5.1 National / International engagement plan with policy makers and funders (M6).

Stakeholder group	Main motivation for engagement. They		
EOSC National Stakeholders	Raise awareness at the country level to resource managers, policy makers, research communities at the country level		
Researchers and resource providers in ESFRI clusters of the countries involved	·		
Cloud and general Software technology providers	following up closely the development of technology		
InfraEOSC-5 (a, b, c) and EOSC-related H2020 projects	define common areas of work and harmonize procedures		





Business organisations	can exploit services, data and technologies with commercial services
Research communities (incl. Individuals and long tail of science)	are the users or future users of EOSC- Synergy services
Governmental, funding, policy agencies	are funding the project and most of consortium members
General public	are paying with their taxes for the initiative so must be kept informed in outreach mode.

Table 12. Relation between the stakeholders groups and the main interest of EOSC-Synergy to engage them

For these stakeholders groups (and specific subgroups) the following specific ways to engage with them have been defined:

Stakeholder groups	Stakeholder type	Specific subgroup	Specific ways to engage with them
Researchers and resource providers in ESFRI clusters of the countries involved	European e- infrastructures	EGI, EuroHPC	 Consortium channels (Newsletters, meetings, video/written interviews, cross e-infra use cases, etc.) Additional EGI channels (NILs, Council, etc.)
Research communities (incl. Individuals and long tail of science)	Non-European e- infrastructures	Southamerican Stakeholders	Managerial-level communication/interview;Joint events
Research communities (incl. Individuals and long tail of science)	Thematic service developers	Involved in the project	Use cases and interviews with Thematic services
taii di science)		ESFRIs with EGI experience	Rescope existing contacts and experience to EOSC Synergy/EOSC engagement





InfraEOSC-5 (a, b, c) and EOSC- related H2020 projects	H2020 projects	a) Secretariat b) NI4OS EOSC Nordic ExPaNDS EOSC-Pillar c) FAIRsFAIR	Task Forces on areas of common interest
EOSC-related H2020 projects		EOSC Hub RDA	Joint participation on Task Forces and Working Groups
Governmental, funding, policy agencies	EC	DG-RTD DG-CONNECT EuroHPC JU	Engage through national EOSC- Synergy entities (NGIs); Further actions based on EC guidance
Governmental, funding, policy agencies	National	Ministry officials, policy makers, RPOs	 Network of contacts of EOSC-GOV representatives Managerial-level communication and meetings
General public	Society	Citizens in general with an emphasis in undergraduate students	Website with description of the project activities, information via social networks, invitation to public events, public lectures, etc

Table 13. Ways to engage with the different stakeholders groups

3.2.2 Communications

The communication activities have been designed to support and enhance the dissemination of project results and general activities carried out in the project.

3.2.2.1 Target Audience

The stakeholders identified in section 3.2.1 can be classified in 4 types of target audience: Research communities, service providers, policy makers and general society. The *Table14* shows the Research communities as target audience to engage and the main outputs and examples of communication activities.





Target 1 – Research Communities				
Communication activity	Outputs and examples			
Promote / pitch the use cases for publication in science- and non oriented outlets	 Produce leaflets for each thematic service. Promotion of the thematic services in the user community events. 			
Produce multimedia material to support the demonstration of the project results	 Demonstration video of the Service Quality pipelines Demonstration video of the FAIRness assessment service Demonstration video of the training platform. Support to webinar implementation of the above. 			
Write use cases to illustrate success stories of uptake of services	 Success story for each of the integrated Thematic Service, focused on research results, (different format will be used: written use cases, written and video interviews, videos, etc.) 			

Table 14. Communication activities for Research Communities with their outputs and examples

The *Table15* shows the Service providers as target audience to engage and the main outputs and examples of communication activities.

Target 2 – Service providers			
Communication activity	Outputs and examples		
Promote the implementation of Service Quality baseline defined during the project	 1 infographic to illustrate the Service Quality Assurance as a Service (SQAaaS) workflow with first person quotes Participation in training events for service developers (4) Promotion on social media 		
Produce support publications	5 infographic to illustrate usage of thematic services. One per thematic service area.		

Table 15. Communication activities for Services Providers with their outputs and examples

The *Table16* shows the Decision makers as target audience to engage and the main outputs and examples of communication activities.





Target 3 – Decision Makers			
Communication activity	Outputs and examples		
Engage with National Policy makers and EOSC governance appointed officials	One global 'EOSC-synergy: expanding capacities & developing capabilities' publication		
Engage with national funding agencies and governance bodies informed about the project's plans and successes	 1 EOSC Landscape analysis 2 Strategy Plans with a forward look of three years 2 Service Strategy Roadmaps 1 use case collection to demonstrate added values Promotion on social media 		

Table 16. Communication activities for Decision Makers with their outputs and examples

The *Table17* shows the General Society as target audience to engage and the main outputs and examples of communication activities.

Target 4 – General Society				
Communication activity	Outputs and examples			
Promotion of the training platform	Promotion of Hackathons though press releases and academia mailing lists			
Dissemination of the general overview of the project and its main research environments	 1 EOSC Synergy brochure with thematic services in their research environments Promotion on social media 			

Table 17. Communication activities for the General Society with their outputs and examples

3.2.2.2 Brand development

The brand strategy of EOSC Synergy relies on creating a strong image of the project and the key messages and the main channels to make it visible. The above table compiles the main activities for branding in the projects with the main outputs.





Activity	Outputs and examples
Branding of the project to ensure consistency	 Project logo and graphics package, including usage guidelines Presentation and document templates in different formats Roll-up banner and supporting event materials
Establish communication and dissemination channels	WebpageNewsfeed and EventsBlogSocial Media
Define key messages	 Project one-line tagline Project pitch to each target audience Generic EOSC-Synergy poster Generic EOSC-Synergy presentation (slides) Generic EOSC-Synergy flyers

Table 18. Branding activities and outputs

We should highlight the logo design that will be used the rest of the material. The logo represents:



Image 4: EOSC Synergy logo and composition





• e: Data (as the SUM symbol Σ similar to an "E")

os: Connections: EU countries + Latin America

c: Virtual Tools

The complete branding kit is available in Annex 3.

3.2.2.3 Internal communications

The internal communications refers to the ways and means that the project members will engage with each other to execute the project activities and be able to reach the goals of the project. These internal communications are part of the project coordination duties. The channels and organization for internal communication are defined in the Quality Plan D1.4.

3.2.2.4 External communications

The external communication channels refer to the ways and means the project has to engage with external stakeholders. They include the website, the newsfeed, the blog, publications and social media.

Website

The website will be a repository of information with sections targeted to researchers, the project team and the general public. The main objectives of the website are:

- Give visibility to the project's outputs and exploitable results
- Enhance the public profile of the EOSC Synergy services
- Report on the progress of thematic services
- Display the project's corporate information, including details on partners, funding instruments
- Showcase the EOSC Synergy ongoing collaborations with other projects, for example EOSC Pillar, EOSC Nordic projects
- Host the newsfeed, the blog, social media, and the documents database





	Sections: Main menu; EOSC synergy main banner with calls to action;					
	row 1: project main messages: Building Capacity, Developing Capability,					
	SQAaaS					
HOMEPAGE	row 2: newsfeed ar	nd events				
	row 3: mapping the	EOSC implementation a	at national level			
	row 4: partners invo	olved				
	row 5: Footer + Tw	itter				
			I			
	About EOSC- synergy	key messages	Each page will give an intro of key messages			
			, and the second			
	Our	Scientific	Each page will give an intro at first,			
	Communities	communities	then host subpages			
	News & Events	News; Events;	And additional material (e.g.,			
		Trainings, webinars	videos, presentations, as they are added)			
MAIN MENU	Documents	Project documents	Deliverables, publications, templates			
			templates			
	Blog	Articles	Stories from the project's results			
			and achievements			
	Partners	Who are the partners	EOSC-synergy partners			
	Services	Thematic Services	Brief description of each thematic			
		offered	services			
		able 10 EOSC Synorgy site				

Table 19. EOSC Synergy site map







Image 5: EOSC Synergy home page

The webpage is already available at: https://www.eosc-synergy.eu/

Newsfeed

Updated up to twice a month and edited by the EOSC Synergy Communications Team. The newsfeed is intended to be a public channel to all audiences and will be featured on the EOSC Synergy homepage.

The newsfeed will be used to:

- provide factual reports on the project's activities, outcomes
- give visibility to the project's announcements and calls for action
- host the project's press releases and announcements
- promote project achievements
- promote the EOSC Synergy services and use cases
- promote EOSC Synergy events, webinars and trainings
- Promote other EOSC-related news & activities

Blog

Updated between 2 to 4 times per month, the blog will bring all WPs together to report on project achievements, results and summaries of meetings, including both technical and non-technical approaches. But not only internal outputs will be reported, also new collaborations





with other EOSC projects, and initiatives with other stakeholders will be reported in the blog articles.

A schedule has been shared among the WP leaders to organise the participation of the project members.

Date	WP	Who	Blog title	Link
September 2019		Isabel Campos/Jorge Gomes	EOSC-synergy: expanding capacities and building capabilities	https://www.eosc- synergy.eu/blog/eosc-synergy- expanding-capacities-and- building-capabilities/
November 2019	WP3	Gerard Cohen	FAIRsFAIR collaboration work	
November 2019		Samuel Bernardo	KoM summary: presentations, Santiago tour and visit to Finisterrae supercomputer	https://www.eosc- synergy.eu/blog/eosc-synergy- kick-off-meeting-summary/
November 2019	WP4	Ignacio Blanquer	Exploring thematic services in EOSC-SYNERGY	
November 2019		Samuel Bento		
December 2019	WP1	Isabel Campos	EOSC-synergy at the EOSC Symposium	

Table 20: EOSC Synergy blog initial plan for the first 3 months

Publications

EOSC Synergy publications will be prepared as required by the dissemination and engagement needs. The following table shows the first material that will be created in the first year of the project.

What	Title	Audience	Objective
Leaflets	About EOSC Synergy	Research Communities	increase visibility
Posters	EOSC Synergy	Research Communities	increase visibility, take to events





	e.g. EOSC Synergy and Earth Observation	increase visibility, take to events, highlight project outputs

Table 21: EOSC Synergy publications plan

Social Media

Social media (Twitter) will be used to highlight the project's news, results and achievements and outputs. Social media will be used to:

- Broadcast news
- Promote the activities of the EOSC Synergy project
- Engage with project stakeholders and research communities
- Support the other communication channels
- Promote other EOSC-related news & activities



Image 6: EOSC Synergy Twitter profile

EOSC community communications

The direct communication with the EOSC community will be actively coordinated by the Task Forces (Dissemination group) and the Coordination Board of the EOSC 5 projects.

EOSC communications mail

The email communications@eosc-synergy.eu has been created to external communications.

3.2.3 Events

3.2.3.1 Events organised by EOSC-Synergy





The main goals of organising our own events are:

- To influence the policy and stakeholders of the research and innovation environment.
- To promote the uptake of the services offered by EOSC hub and EOSC portal and bring on new services on them.
- To strengthen the relationship with other regional, national and international initiatives and projects.
- To increase the technical and research knowledge of the communities supported
- In general, to create awareness around the project and disseminate its results.

With these goals, EOSC-Synergy considers that 3 types of organised events must be defined:

- EOSC ecosystem events, in collaboration with WP5
- Training/thematic events
- Coordination events

EOSC ecosystem events

The EOSC related events will be organised jointly with the WP5 and the other EOSC related projects (Secretariat, NI4OS, ExPaNDS, EOSC-Pillar) as well as EOSC Hub project. These events are expected to be the opportunity to share experiences and highlight the main results of the ongoing projects, becoming the major gathering point for EOSC stakeholders. EOSC Synergy will organize at least 2 of these events, (estimated timeline: M12 and M30) with a wider variety of visibility opportunities through keynote talks, parallel presentations, training courses, posters sessions and demo areas.

Thematic and training events

Thematic events are related to WP4 and will be organised by the owners of the services and data repositories. These events will provide excellent opportunities to disseminate the EOSC Synergy project among scientific communities.

Training events are related to the whole project. Each WP will manage and organise their own training sessions, workshops and seminars to guarantee the technical uptake of the services and to promote the proper and adequate management of data, technology and results by both technical and scientific communities. The table shows the expected training sessions to be carried out during the execution of the project.





Training type	WP org.	Target Audience	Channel	Dates
Technical workshops and webinars	WP2	Technical service integrators and System Operation managers	Online and collocated to major events	M5, M15
Innovation Management webinar	WP1	Technical stuff EOSC Synergy Research communities	Collocated to major events	M10
Presentation of the MOOC platform	WP6	Research communities and External communities	Collocated to major events	M12-30
HaaS sessions	WP6	External communities, Mainly IT Universities.	Regional events	M12- M30

Table 22: EOSC Synergy training plan

Coordination events

Coordination events are organised by WP1, mainly by the Project Coordinator with the support of the PMB, to guarantee the correct execution of the project. The kick-off meeting and bi-annual meetings are some of the physical events that will take place during the project. For more information, refer to D1.4.

3.2.3.2 Events with EOSC-Synergy participation

In addition to the events organised by EOSC Synergy, project members will participate in a higher number of external events where the visibility of the project will be significantly increased. The *Table 23* list some of the events already attended and some of the expected to attend.

Event name	Date	Sector	Location	Opportunity
EOSC Hub Week	10-12 April 2019	EOSC stakeholders	Prague	Dissemination
KoM of EOSC-Pillar	5-7 June 2019	EOSC stakeholders	Torino	Collaboration
E-infracentral	20 June 2019	EOSC stakeholders	Tallin	Dissemination





EOSC Concertation meeting	9-10 Sep 2019	European Commission	Brussels	Collaboration, Dissemination
Focus on Open Science	29 October 2019	Other	Lithuania	Dissemination
EOSC Symposium	28-29 Nov 2019	EOSC stakeholders	Budapest	Collaboration, Dissemination
EOSC-hub week	18-20 May 2020	EOSC stakeholders	Karlsruhe, Germany	Dissemination
EGI Conference 2020	23-25 Jun 2020	EOSC stakeholders	France	Dissemination

Table 23: Events with EOSC Synergy participation

3.2.4 Measuring success - KPIs for dissemination and communication activities

For the measure of success in communication activities, EOSC Synergy establishes 2 types of communication activities:

- Project related communications
- Communication and support for dissemination and exploitation of project results

The following table shows the measures for the communication of project activities and the expected outputs as described in the Description of Work.

ACTIVITY	Outputs
Objective	e: Define the image of the project
Develop the project corporate identity	> Project logo, presentation and document templates to support consortium communications
Establish the key messages about the project and ensure consistency	> Project one-liner and pitch to each target audience > Generic project poster & flyer
Summarise the project in a short video	> 1 short (1 minute) video about the project and its goals > To be posted on the social media feeds of 10 partners





Objective: Establi	sh and maintain communication channels
Develop the project website	> Web platform with up-to-date information on the project; to be repurposed after the project's end as a repository of information
Develop contacts to be deployed in dissemination and exploitation	> A database of project contacts for announcements and news > A database of news feeds, newsletters and other channels where the project can promote its results (e.g. EGI newsletter)
Establish communication channels and keep them up to date	> Blog to publish articles about developments, announcements, news > 24 contributions per year to the blog
Objective: Facilitate the	project work and inspire a sense of community
Organise the project meetings	> 6 project meetings: 1 kick-off meeting and 1 all-hands meeting every six months
Keep the consortium informed and engaged	> 15 'Coordinator Briefs' detailing the latest developments and actions > 1 area on the website with generic information for the consortium (e.g.: quality plan, status of deliverables, etc) > 1 communications package of the consortium with project messages, description, slides, templates

Table 24: Measures to communicate project activities and outputs

The *Table 25* collects the measures for the communication activities to support the dissemination and exploitation of project results as described in the DoW.

Activity	Outputs
Demonstrate scale of resources added	> 1 infographic to show the degree of capacity expansion > 1 infographic to show the diversity of capabilities built onto EOSC > 1 infographic to promote the span and scale of EOSC Portal resources





Write case studies > 2 case studies focused on successful use of cloud resources > 4 case studies focused on the integration work > 2 case studies focused on the usage of the training platforms (user journeys) Leverage EGI contacts > 4 articles about project results published in the EGI Newsletter (readership: ~2000 per issue) > 6-10 emails to specific contacts requesting redistribution in their communitie (e.g. the SAPS service is of interest to the ICOS infrastructure) Promote the project's "How to" guides > 1 edited and published version of the 'Handbook for integration' > 1 edited and published version of the 'How to Guide for trainers' > For each: 1 version the publication in slide format Promote the thematic services > 1 service description optimised for the EOSC Portal (per service integrated) 1 'how to access' guide for each service Promote the data > 1 overview of the data contained in the repository (per repository added) to
contacts ~2000 per issue) > 6-10 emails to specific contacts requesting redistribution in their communities (e.g. the SAPS service is of interest to the ICOS infrastructure) Promote the project's "How to" guides > 1 edited and published version of the 'Handbook for integration' > 1 edited and published version of the 'How to Guide for trainers' > For each: 1 version the publication in slide format Promote the thematic services > 1 service description optimised for the EOSC Portal (per service integrated) 1 'how to access' guide for each service
project's "How to" and published version of the 'How to Guide for trainers' > For each: 1 version the publication in slide format Promote the thematic services > 1 service description optimised for the EOSC Portal (per service integrated) 1 'how to access' guide for each service
thematic services 1 'how to access' guide for each service
Promote the data > 1 overview of the data contained in the repository (per repository added) to
repositories be published in the EOSC Portal
Promote training > 1 overview of usage during the project span and key benefits of the platform
Promote the project's policy work > 6 presentations of the project's results in EOSC-related conferences (e.g. DI4R, EOSC Stakeholder forums, e-IRG meetings) > 1 mail distribution to all national infrastructures (leveraging consortium contacts) per policy work
Promote the quality badge scheme > 1 overview of how the scheme works. > 1 publicly available table of badges awarded.
Promote the Software Quality baseline > 1 digested overview of what makes a software component compliant
Promote the SQA-as-a-service > 1 article on community newsletters about the service (e.g. EGI newsletter) > 1 page on the EOSC Portal describing the service with messages for users and for developers

Table 25: Measures to communicate the project results

In order to collect and easily measure all the activities that will be carried out, a space in the project internal repository has been created by the communication manager.





Annex I - Definitions

	,		
(Project) Result	Any tangible or intangible output of the project, such as data, knowledge or information that is generated in the project whatever its form or nature, whether or not it can be protected by related intellectual property rights.		
Aggregate project result	An aggregation of several results that are targeted at the same audience and participate in providing the expected benefits (project expected impacts). An aggregate result can be Key or Supporting, according to its priority with respect to the project expected impact.		
Key Exploitable result	(KER) The most relevant results of the project A subset of the aggregate project results selected considering specific criteria depicted in the Aggregate Project Result template		
Type of result	 Software and services: improved components for integrated service hub; Technical specifications to improve interoperability of compute, storage, data and software; Policies and procedures for service management, FAIR data management and security; Documents and reports: scientific publications, technical and service roadmaps, training material; Business models: new organizational principles to offer services for research sustainably; Other, not listed above 		
Exploitation	The use of results in: • Further research activities other than those covered by the action concerned • Developing/creating/marketing a product/process • Creating and providing a service • Standardization activities		
Deliverable	Distinct output of the project, meaningful in terms of the project's overall objectives and constituted by a report, a document, a technical diagram, a software etc.		
Dissemination	The public disclosure of the results by any appropriate means, including by scientific publications in any medium.		
Innovation	A new (or improved) entity (or creation), which when used can produce tangible benefits, satisfying users' needs and wants.		





	Types of Innovation:	
Impact	The benefits derived from the innovation: the greater the benefit, the greater the impact	
Intellectual Property (IP)	An IP is a product of the mind generated for example from research and experimentation, or creativity. An intellectual property can be traded, sold, bought, leased, used as collateral, or given away. Examples: software, designs, databases, reports, roadmaps	
Intellectual Property Right (IPR)	 Legal "rights" to protect your Intellectual Property Patents (technical inventions) Copyright (e.g., software, written works, engineering drawings) Design rights (appearance) Database rights (creation and arrangement of data) Trademarks Utility Models/petty patents Non-disclosure agreements 	
Milestone	Control point in the project that help to chart progress. Milestones may correspond to the completion of a key deliverable, allowing the next phase of the work to begin. They may also be needed at intermediary points so that, if problems have arisen, corrective measures can be taken. A milestone may be a critical decision point in the project where, for example, the consortium must decide which of several technologies to adopt for further development	
IP Background	IP asset owned by the partners brought into the project	
Third party IPs	IP assets owned by the organizations not directly involved in the project	
IP Sideground	IP asset that is relevant to a collaborative venture or open innovation project, but produced outside the project by any of the partners during the project's tenure	
IP Foreground	All IP assets created during the project	
Target audience	Who will use the result	





Early adopters	Who will start using the result as soon as it is available	
Catalogue of Project ResultsList of all collected EOSC-Synergy project results (included aggregated project results) and related information.		
Process	A process is a structured set of activities, with clearly defined responsibilities, that bring about a specific objective or set of results from a set of defined inputs.	
Procedure	Specified set of steps or instructions to be carried out by an individual or group to perform one or more activities of a process.	

Table A1: Definitions





Annex 2: Background IP

Entity	Describe Background	Specific limitations and/or conditions for implementation (Article 25.2 Grant Agreement)	Specific limitations and/or conditions for exploitation (Article 25.3 Grant Agreement)
CSIC	Pipeline library source code for SQA-as-a-service	Excluded	Excluded
CSIC	Software Quality Assurance baseline for SQA-as-a-service	Excluded	Excluded
UPV	CLUster Energy Saving system (CLUES)	Background will be made available –on a need to known basis- to other parties, for the implementation of their specific tasks on a royalty free basis, under GNU General Public License - version 3.0 (GPLv3) and Python License, Version 2 (Python-2.0).	Access rights on background knowledge needed by other parties, for the exploitation of their own Results, shall be given under financial terms to be agreed in the corresponding licence agreement and in compliance with the GNU General Public License - version 3.0 (GPLv3) and Python License, Version 2 (Python-2.0)
UPV	R-17353-2015 - Infrastructure Manager (IM)	Background will be made available —on a need to known basis- to other parties, for the implementation of their specific tasks on a royalty free basis, under GNU General Public License - version 3.0 (GPLv3) and Python License, Version 2 (Python-2.0).	Access rights on background knowledge needed by other parties, for the exploitation of their own Results, shall be given under financial terms to be agreed in the corresponding licence agreement and in compliance with the GNU General Public License - version 3.0 (GPLv3) and Python License, Version 2 (Python-2.0)
UPV	R-17368-2015 -Elastic Cloud Computing Cluster (EC3)	Background will be made available –on a need to known basis- to other parties, for the implementation of their specific tasks on a royalty free basis, under GNU General Public License - version 3.0 (GPLv3) and Python License, Version 2 (Python-2.0).	Access rights on background knowledge needed by other parties, for the exploitation of their own Results, shall be given under financial terms to be agreed in the corresponding licence agreement and in compliance with the GNU General Public License - version 3.0 (GPLv3) and Python License, Version 2 (Python-2.0)





UPV	Serverless container-aware Architectures (SCAR)	Background will be made available –on a need to known basis- to other parties, for the implementation of their specific tasks on a royalty free basis, under Apache 2.0 License.	Access rights on background knowledge needed by other parties, for the exploitation of their own Results, shall be given under financial terms to be agreed in the corresponding licence agreement and in compliance with the Apache 2.0 License.
INDRA	GCORE v.3.3.0 Date of Creation: July 2018 Software solution developed by INDRA to cover Ground Segments functions associated to data orchestration (ingestion, processing, dissemination, etc.). Delivered as object code.	Royalty-free basis for development activities in the context of this project	Fair and reasonable conditions to be agreed for commercial or exploitation purposes, including financial terms, taking into account the specific circumstances of those objectives to be defined in the service agreement.
BSC (Third party)	OpenEBench	Limitations included in the GNU Licence	Limitations included in the GNU Licence
BIFI (Third party)	HaaS – Hackathon as a Service. Platform to manage computing resources in hackathon competitions.	Access to the platform provided to project partners during the execution of the project. The software remains property of University of Zaragoza-BIFI.	Exploitation of the platform for commercial purposes by any other beneficiary than University of Zaragoza-BIFI is not allowed unless a specific agreement and licensing are established.
CIEMAT (Third party)	CIEMAT represents the consortium LAGO, which is part of. The Latin American Giant Observatory (LAGO) is an extended cosmic ray observatory composed of a network of water-Cherenkov detectors (WCD) spanning over different sites located at significantly different altitudes (from sea level up to more than 5000 m a.s.l.) and latitudes across Latin America, covering a wide range of geomagnetic rigidity cut-offs and atmospheric absorption/reaction levels. It is an observatory designed, built, and operated by the	Background will be made available –on a need to known basis- to other parties, for the implementation of their specific tasks on a royalty free basis, under GNU General Public License - version 3.0 (GPLv3) and Python License, Version 2 (Python-2.0).	Access rights on background knowledge needed by other parties, for the exploitation of their own Results, shall be given under financial terms to be agreed in the corresponding licence agreement and in compliance with the GNU General Public License - version 3.0 (GPLv3) and Python License, Version 2 (Python-2.0)





LAGO Collaboration (http://lagoproject.org/), a non-centralized collaborative union of more than 30 institutions from ten countries.		
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Table A2: Background IP



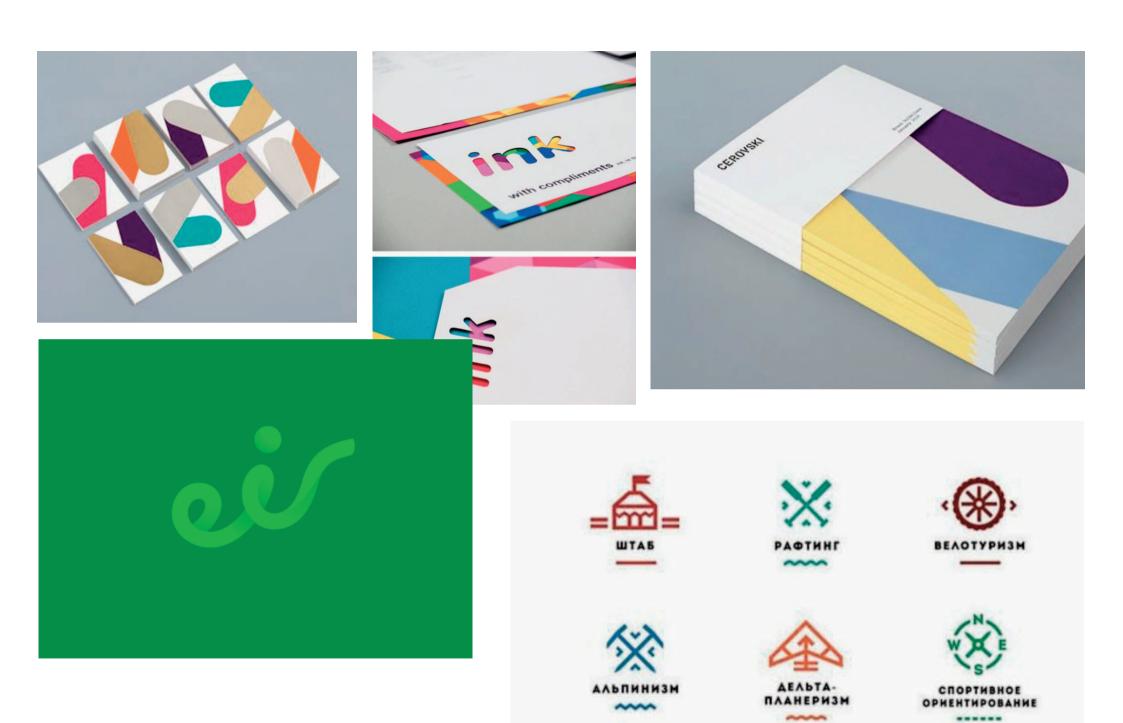


Annex 3: Branding Kit





ID: Tendencias







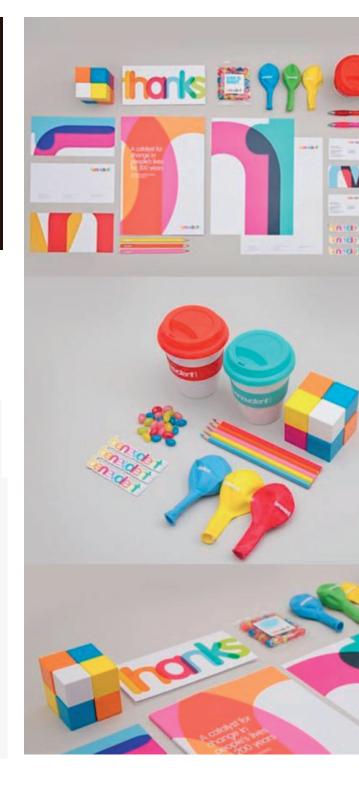














Conceptos







almacenamiento



Nube virtual



Herramienta



Conexión (entre países UE + Sudamérica)



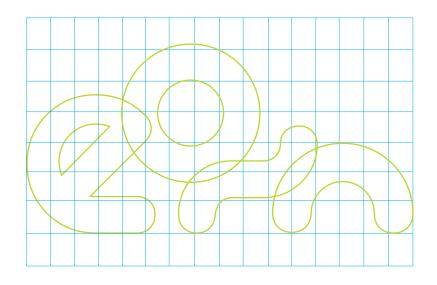




Adaptamos las letras a la forma de una nube para hacer referencia al objetivo de este proyecto: La creación de una **nube virtual** de datos científicos y técnicos.



ID: Trabajamos el icono



Versión a todo color



Representamos la Unión y la conexión entre los diferentes países de la UE con un logotipo con toda la paleta de colores, destacando también la unión con Sudamérica.

Con esto, Presentamos una versión del logotipo desde un punto de vista más global y tal y como sucede en los aros de juegos Olímpicos, asignamos un color para cada letra, que representa cada continente. De izda a decha: Europa, Oceanía, América y Asia, reservando el negro de África para las letras.



ID: Trabajamos la tipografía EOSC SYNERGY EOSC SYNERGY





Mostramos dos opciones de logotipo: Una en la que los colores se superponen y otra en la que las letras se muestran una encima de la otra sin superposición de colores.



ID: Componemos el logotipo





Con estas mismas versiones componemos el logotipo con la tipografía en verde. Escogemos un verde lima (partiendo del logo de Ibergrid), más relacionado con el mundo tecnologíco y de cooperación entre países. Versión a una tinta







Tamaños mínimos



















Favicon

Reducción del logotipo A tamaños muy reducidos la tipografía al ser muy gruesa, no reduciría bien y habría que uptar por utilizar unicamente el isotipo.



ID: Aplicaciones







