DELIVERABLE

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Deliverable 6.3 Researcher Communication Plan

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Deliverable 6.3 Researcher Communication Plan

Executive summary

This deliverable introduces the Researcher Communication Plan, which outlines the communication strategy of Europeana Research towards the stakeholders and sets the framework for future activities related both to communication and dissemination. Specifically this document:

- Defines the stakeholders for Europeana Research.

- Defines the key messages of Europeana Research.

- Matches the aforementioned stakeholders with the key messages of Europeana Research in order to develop specified key messages for each stakeholder category.

The Researcher Communication Plan is informed by work conducted within WP1 in order to develop requirements for the Europeana Research Platform. In addition to developing key messages for Stakeholders this deliverable points out the channels through which the dissemination of the key messages is to be conducted and establishes the timeframe of the Researcher Communication Plan.

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1) Outline of stakeholders

Individuals

Europeana Cloud has been employing targeted communication aiming to engage with three specific sets of stakeholders defined during the course of the project, namely (i) research infrastructures, (ii) researchers and (iii) content aggregators, developers, IPR specialists and the extended Europeana community of services, policy makers and funders.[1]

This communication plan focuses on researchers, drawing on work already conducted in the context of Work Package 1 for defining and identifying research communities that will be targeted, examined and thus served by Europeana Research. It also touches on research infrastructures as a 'gateway' to research communities, but also a group where there is mutual strategic interest.

Taking into account the content strategy of Europeana, Europeana Research inherits the target community defined in Europeana Cloud for facilitating access to Europe's cultural and intellectual heritage for researchers in the Humanities and Social Sciences. Considering that these "two research fields are amongst those most familiar with using items from cultural collections", the target research community that is intended to be supported by the platform will be "researchers undertaking digitally-enabled research in those disciplines".[2]

The platform of Europeana Research thus aims to serve the needs of researchers in the Humanities and Social Sciences undertaking research on the digitized content of Europe's galleries, museums, libraries and archives. However, issues of licensing, interoperability and access can often impede the re-use of such data in research. Europeana Research aims to face these challenges in order to liberate cultural heritage for use in research through:

- Building focused aggregations of content
- Exposing Europeana's aggregations of text and metadata to allow research teams and infrastructures to build specific tools and services
- Linking disparate collections and tools in different institutions and building workflows between them
- Highlighting collections in the Europeana dataset of specific interest to researchers
- Collaborating with other infrastructures

As both the Expert Fora on Humanities and on Social Sciences Research demonstrated, there is an increasing engagement of humanists and socials scientists with digital content, while their use of digital tools and services varies according to their field of research and computational background.[3]

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[1] Deliverable 6.1: Stakeholder Engagement & Infrastructure Plan, p. 8.
[2] Deliverable 1.1: Research Communities Identification and Definition Report, pp. 2, 3.
[3] Deliverable 1.5 (2 of 4): Expert Forum Tools and Content for Humanities Research; Deliverable 1.5 (3 of 4): Expert Forum Tools and Content for Social Science Research.

However, the Expert Fora also demonstrated that each different discipline in the arts and humanities, and social sciences required access to different tools and data. The fora identified a variety of disciplines - Economic History, Political Sciences, Gender Studies, Sociology, Cultural Geography, Peace and Conflict Research for the Social Sciences and Archaeology, History, Law, Linguistics, Musicology and Philosophy for the Humanities. In each of them, there were some common requirements for basic tools (most of which are supplied by Google search facilities), but also distinctive tools tailored for their own research. This is also borne out by other research in the area, not least the user surveys carried out by WP3 of Europeana Cloud. [45]

Such a divergence of requirements provided focus for the rationale behind Europeana Research.

Europeana Research should and will not act as all things to all researchers in the relevant disciplines. Europeana simply does not have the ability cater for each discipline - nor does it hold anything like a monopoly on the data that a researcher may require.

Rather, Europeana Research should allow other parties to build the specific tools on top of the rightslabelled, standardised data that Europeana ingests using the Europeana API. It is the representatives in the specific user communities themselves that have the best incentive to develop the tools that work for them. This chimes with the work being undertaken in WP3 of Europeana Cloud – where specific tools for specific communities (early modern philosophers, musicologists) are being built on top of the data supplied by Europeana.

Furthermore, this ties in with Europeana's broader strategy for 2015 – 2020, that enables experts to take the data and produce user centric services with their specialist knowledge. Scalability as well as cost and knowledge prevents Europeana from wishing to provide interfaces, tools and services for each distinct user community. So the focus on becoming a platform upon which other can build services. Europeana supplies the data; others build the interfaces on top of this data.

Europeana Research addresses researchers in the Social Sciences and the Arts and Humanities. In order to raise awareness of the project and deliver the message of Europeana Research efficiently, stakeholders need to be divided into coherent groups according to those characteristics that make significant difference regarding their use of Europeana Research. Above all, it will the users' level of fluency in downloading corpora of data, or building on top of the Europeana API that will influence their engagement with Europeana Research.

In the first instance, the natural focus is with those researchers who are far more comfortable with harvesting and using digital data on a regular basis within their research.

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[4] Deliverable 3.1: Personas, scenarios and use cases, http://pro.europeana.eu/documents/1414567/fc412042-d265-4713-8cc2-

[5] d15d5efd3b. See also RIN (2011), Reinventing research? Information practices in the humanities, http://www.rin.ac.uk/our-work/using-and-accessing-information-resources/information-use-case-studies-humanities and Ithaka (2012) Supporting the Changing Research Practices of Historians - See more at: http://www.sr.ithaka.org/researchpublications/supporting-changing-research-practices-historians#sthash.JDvqnY3X.dpuf

These can be broken into two further sub-groups. Those with programming expertise and are at home working with the API and developing their own tools; and those that may not have programming / API experience but can download and manipulate corpora of data within off-the-shelf software (whether online or installed on their own laptop).

There are other groups to consider. A third group is those researchers that are on the periphery of this type of approach, but wish to 'dip their toe in' to see what they might be able to do with the data. These researchers would require a different message to those with greater expertise, but are still a valid target; despite an increase in digital humanist practices within the sector, the majority of researchers in Humanities and Social Sciences are not proficient in digital data techniques.

Finally, there are the 'resistant traditionalists' that are not yet comfortable with digital approaches to the humanities. At the moment, It is not the task of Europeana Research to focus on them. However, this will be reviewed as work progresses beyond Europeana Cloud.

Researchers' communities to be addressed by this Communications Plan will therefore be prioritized according to Everett Rogers' diffusion of innovations theory: research communities are not to be discipline-prioritized[6] rather, we are going to group them by their ICT familiarity; novices (those without much knowledge but interested), learners (those who can consume digital data) and experts (those who can code / exploit APIs).

Groups – Research Infrastructures

Beyond these specific groups, this stakeholders' Communications Plan also addresses other EU Research Infrastructures and initiatives, such as DARIAH and CLARIN, but also EHRI, ARIADNE, NeDiMAH, DARIAH-RC and Pelagios commons. These infrastructures and initiatives form larger networks of groups interested in conducting research in the digital humanities (e.g. DARIAH) and linguistics (e.g. CLARIN) across Europe. Interacting with such groups is vital for Europeana Research – they form an excellent way of working with the learners and experts identified above.

Groups – Discovery System Vendors

Researchers do not form the only potential group who might wish to make use of the richer data available via Europeana Research.[7] Discovery system vendors working at web scale are now common; their systems are integrated in to several educational and cultural institutions.

Data from Europeana Research may well be of value to them as they try and create and larger and more comprehensive indices of scholarly and cultural content. Indeed there may even be more strategic partnerships that the Europeana Foundation can develop with one

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[6] Everett Rogers, *Diffusion of innovations*, New York 1962, p. 150
[7] There may be some overlap here with Europeana Labs

or more of these vendors in terms of enriching the quality of data or reaching a breadth of content.

The most significant systems and players are

- Primo (developed by ExLibris)
- World Cat (developed by OCLC)
- Summon (developed by Serial Solutions)
- EDS (developed by EBSCO)

Europeana may also want to work more closely with the other aggregators here as well. The European Library has already had some discussions with the above about sharing its bibliographic metadata with the above – it would be useful if all the data within the Europeana eco-system could be presented as part of a single package.

Groups – Third Party Publishers

Related to the above, numerous third party publishers work with content made available by the GLAM sector to develop paid for digital resources for research and teaching. Within the UK, the most well-known providers are:

- Gale Cengage Learning
- ProQuest
- DC Thomson Family History
- Adam Matthew Publications

Each of these providers works closely with selected range of cultural heritage institutions to digitise content on a select theme, build an interface and then, usually via subscription, sell access to interested parties.

To enhance their offering, the data from the Europeana eco-system may be of use, integrating it with the resources that they are developing.

Conversations with such companies should also provide feedback as to the quality and scope of Europeana data, and the most suitable ways for accessing that data (or parts of that data).

There are likely to be others outside the UK who may also be of interest to Europeana Research. More generic new media companies – Google, Apple, Microsoft to name but a few – may also be interested in building Europeana data into their research tools.

Groups – Public Infrastructure Providers

Within some countries, public initiatives exist to bring together relevant content for research re-use. Such an example is the Research and Education Space in the UK. [8]

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[8] http://bbcarchdev.github.io/res/ Further investigation is required to uncover similar developments in Europe

As with publishers and vendors, some of the data aggregated within the European eco-system may well of interest to the teams developing such services.

Recap of Stakeholders

Resistant Traditionalists	Those unwilling to engage with anything more than basic search. They will be pointed to the existing Europeana search portal
Novices	This group includes researchers that have little or no knowledge of APIs and limited IT familiarity, but are perhaps interested in learning more . "Novices" make limited use of IT in the course of their research and are usually comfortable with services and tools providing them with content and resources.
Learner	This group includes researchers that have been introduced to using data corpora, are IT literate and have basic understanding of new technologies. "Learners" take advantage of services and tools beyond simple search and are able to perform advanced data analysis.
Expert	This group includes researchers that are already engaged to new technologies, make use of APIs and can easily adapt to IT innovations. "Experts" are digital Humanists and digital Social Scientists using IT on a regular basis for their research. Furthermore, "experts" often incorporate IT in their work and stay up to date on changes in technology.

Europeana Research Infrastructures	Not specific users as such, but they form the large groups of communities that will be formed of the learners and experts above. Also in a position to discuss strategically with Europeana
Groups – Discovery System Vendors	Group who may want to use research-inflected data from Europeana within their own systems and tools for research use
Groups – Third Party Publishers	Group who may want to use research-inflected data from Europeana within their own systems and tools for research use
Groups – Public Infrastructure Providers	Group who may want to use research-inflected data from Europeana within their own systems and tools for research use

2) Key messages for Stakeholders

Stakeholder Group	Message	How	Date
Expert [e.g. An archaeologist employing computational methods & 3D representations of ancient Greek pottery. She is incorporating IT in his research and the output of his work is intrinsically connected to computational methods. Or, for example, a digital humanist who works with other in the various subject areas to build tools on top of APIs	Europeana Research offers a programmable API over data, relevant to your research, in the Europeana eco-system (Europeana, TEL, others) The data is a huge collection from Europeana cultural heritage - standardised and rights-labelled	Via the Europeana Research portal, conferences, other strategic infrastructures Eg. EuroMed Conference, Dariah meeting in Rome, other EU infrastructure meetings? Via the Europeana Research Twitter account (@EurResearch) Via the Europeana Research blog (http://research.europeana.eu/blogposts) For WP3 outputs, communicate with specific discipline communities identified by project partners	From Autumn 2014 onwards
Learner [eg. A social historian who frequently uses digital services and tools for her research. He uses a database for storing and retrieving her research material, he uses software particularly addressed to social historian and he can carry out advanced data analysis using off the shelf software.]	Europeana Research offers dumps of data, relevant to your research, in the Europeana ecosystem (Europeana, TEL, others) The data is a huge collection from Europeana cultural heritage - standardised and rights-labelled	Via website, conferences, other strategic infrastructures Eg. EuroMed Conference, Dariah meeting in Rome, other EU infrastructure meetings? Via the Europeana Research Twitter account (@EurResearch) Via the Europeana Research blog (http://research.europeana.eu/blogposts)	From Autumn 2014 onwards
Novice [eg., An art historian who uses conventional, nondigital research methods. He is interested in learning how	(For first iteration of Europeana Research) Go to portal to search for Europeana	Via the Europeana Research portal (http://research.europeana.eu)	2014

to gather content through search engines, but does not want to interact with his data.]	(For later iterations) – Learn more about how you can use Europeana data and APIS		2015
Resistant Traditionalist – one unlikely to engage with anything but the most basic digital services, ie using digital resources of search and discovery but not analysis	Go to portal to search for Europeana	Via the Europeana Research portal (http://research.europeana.eu)	2015
Research Infrastructures	Europeana wants to work with DARIAH groups to build tools, and enhance it collection strategy, forming a common approach to cultural heritage in Europe	Via strategic meetings, eg DARIAH conference, Europeana AGM	Ongoing conversations
Groups – Discovery System Vendors	Europeana Research offers a trusted, rightslabelled, standardised collection for use in others' research tools	Ongoing one-to-one conversations	
Groups – Third Party Publishers	Europeana Research offers a trusted, rightslabelled, standardised collection for use in others' research tools	Ongoing one-to-one conversations	
Groups – Public Infrastructure Providers	Europeana Research offers a trusted, rightslabelled, standardised collection for use in others' research tools	Ongoing one-to-one conversations	

3) Tactics for each group

This section identifies and elaborates the tactics that are to be used to disseminate the message of Europeana Research to the stakeholders outlined above. These tactics are to be implemented after November 2014, when the platform is operational. The methods of communication outlined here are supplementary to the many existing channels used by Europeana in order to disseminate its messages to all interested parties.

These include the Europeana mailing list, the existing LinkedIn groups, as well as the Twitter account, as well as events, direct contact, the Pro blog, the Pro newsletter and the Europeana communicators group. The tactics summarized below are complementary to the aforementioned communication methods and are provided in order to narrow down the communications approach appropriately for each different group of stakeholders.

Experts

Our approach towards the Experts will focus on the use of the Europeana API and their interaction with the content of Europeana. Experts will not only be invited to use the Platform's content, but they are also being invited to have programmatic access to the data through the APIs. Moreover, the experts are encouraged to work with the data in order to enrich it, thus further enhancing Europeana's data. It is therefore evident that this group is of outmost importance to Europeana Research, as the Experts are going to be the researchers' group that will make full use of the platform.

It is necessary to spread the word through conferences and other meetings where researchers interested in digital humanities meet. Additionally, the use of social media will once more be of great value in order to disseminate the message and build a digital community engaged in the use of the Europeana API.

Selected experts have participated in the above-mentioned Expert Fora and have contributed towards building a community of researchers around Europeana Research through discussions on content strategy and user requirements for the Platform. Furthermore, the fourth and final Expert Forum held in Athens in October 2015 also involved external experts who developed recommendations regarding primarily the future involvement of researchers.[9]

As a final point, as the researchers in this category are digital humanists and digital social scientists themselves, most have already established a relationship with other big infrastructures, such as DARIAH etc. (for tactics towards this group, see below). Consequently these infrastructures can be also a target not only by themselves, as major stakeholders, but also as a channel through which the Experts can be approached.

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[9] Deliverable 1.7: Research Community Evaluation Report (http://pro.europeana.eu/files/Europeana_Professional/Projects/Project_list/Europeana_Cloud/Deliverables/D1.7%20Research%20Community%20Evaluation%20Report.pdf)

Learners

Tactics for Learners will also focus on their prospective involvement with data and other digital tools available through Europeana Research. Since this group of researchers have some familiarity with the use of IT in the course of their work, our approach lies in the provision of supportive know-how in order to enable them to fully take advantage of the tools and services of Europeana Research.

The ways of approaching learners will be similar to those of Experts.

The abovementioned goals will also be pursued through social media and dedicated blogs dissemination, along with systematic propagation of the key messages for learners in important conferences, symposia and other meetings of interest for the targeted group.

Novices and Resistant Traditionalists

At present, the Europeana Research portal will not cater for these two groups; they will be redirect to the search portal to find items of interest to their research there.

As the scope of Europeana Research increases, these groups will be reconsidered and the communications plan changed accordingly.

Research Infrastructures

There are a number of research infrastructures and EU initiatives including DARIAH (which has related projects such as CENDARI, EHRI, ARIADNE, Pelagios Commons, DARIAH-RC), CLARIN and CESSDA. Dialogue with this group has a two-fold purpose Europeana Research with respective research communities in the digital humanities.

DARIAH, as the catch all research infrastructure for the arts and humanities, is perhaps the most important connection; indeed in its ability to speak to relevant research groups across Europe, it could end up being the most important connection for Europeana Research, providing a channel to reach research groups and the individual learners and experts identified in the communications plan.

The communication between Europeana, DARIAH and CLARIN should also be more than using DARIAH as a channel to researchers. There is also strategic alignment between the two in what infrastructures should be build, by whom and for what purpose.

From the point of view of Europeana, it is in the best position to:

- Act as the network that connects Europe's libraries, archives and museums to its researchers
- Act as the point that aggregates data from Europe's cultural heritage sector, ensuring best practice in metadata and rights labelling to enable scholarly reuse

In relation to Europeana Research, DARIAH, CLARIN and other initiatives are in the best position:

· Build tools and services focussed on the research community making use of data from the Europeana eco-system
· To provide ongoing feedback to Europeana (and its network) on the quality and scope of its data and the method of dissemination

Groups – Discovery System Vendors, Third Party Publishers, Public Infrastructure Providers

Discussion also needs to be had with the Europeana Creative / Europeana Labs to ascertain exactly the responsibility for talking to these third parties lies.

4) Relevant Conferences, Mailing Lists for all Groups

o DARIAH-all mailing list: dariah-all@dariah.eu o DARIAH-EU twitter account: https://twitter.com/dariaheu o News items on the DARIAH-EU website: https://dariah.eu/news.html o The newly-established DARIAH VCC2 Research and Education blog http://dariahre.hypotheses.org/
o Information about Europeana Research will also be spread through CENDARI, ARIADNE and CESSDA (for the social scientists). Moreover, communication will be undertaken by digital humanities networks such as the following:
    o Humanist Discussion Group: http://dhhumanist.org/
    o ADHO, EADH, CenterNet mailing lists
o Europeana Research will be communicated through printed materials through Summer Schools (e.g. see: https://dariah.eu/news/events.html), as well as at affiliated partner events

5) Conclusion

The Researcher Communication Plan, first introduced in summer 2014, was well adopted, enriched and thoroughly implemented throughout the context of the project. Several initiatives were undertaken in terms of communicating the project, its outputs and developments to the wider community, experts, learners and novices. More particularly:

- A series of Expert Fora were held, launched as "Europeana Research Invites", introducing the work conducted within the project to the scholarly community and embedding it to the broader framework of RIs in Europe.

- The public outreach of Europeana Research was a lively process as can be seen by the rich content already gathered in the Europeana Research Blog and lively Twitter account, followed by almost a thousand active Twitter users. Blog posts and tweets informed on all developments in the project, from new tools built to relevant events and featured collections highlighted within Europeana, a task mainly undertaken by the WP1 team.

- By implementing a rather open and inclusive Communication Plan, Europeana Research called for collaboration the main Research Infrastructures in the field, whilst monitoring track of their progress and sharing their news and events with the ever growing Europeana Research community.

Related documentation

Deliverable 1.1: Research Communities Identification and Definition Report [10]

Deliverable 1.5 (2 of 4): Expert Forum Tools and Content for Humanities Research

Deliverable 1.5 (3 of 4): Expert Forum Tools and Content for Social Science Research

Deliverable 1.7: Research Community Evaluation Report

Deliverable 6.1: Stakeholder Engagement & Infrastructure Plan

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[10] All project documents can be found at http://www.pro.europeana.eu/web/europeana-cloud/results/-/document_library_display/p6BV/view/2240207