



SEQUOIA PROJECT
"Socio-Economic Impact Assessment for Research Projects"

Contract n° 258346

WP4: Dissemination and Assessment Methodology Transfer

Deliverable D4.1
Methodology and best practices dissemination
plan and dissemination tools



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1. BACKGROUND

The overarching objective and motivation of SEQUOIA is to facilitate the maximisation of the impact of Software as a Service and Internet of Services projects (SaaS and IoS), and also support the transfer of results to SMEs. To reach this overall objective, the SEQUOIA partners decided:

- firstly*, to measure the potential impact of already funded projects by developing a sound socio-economic methodology for the measurement of this impact,
- and secondly*, to render the methodology applicable by new projects on their own, without the help of this support action.

During the SEQUOIA kick-off meeting held in Rome on 25-26 May 2010 the consortium analysed the work to be performed in the first 6 months of the project and generated a revised detailed workplan. With regard to Dissemination it was reiterated that the methodology and dissemination tools would be closely aligned to and support the research agenda. To this end, the starting point was to analyse the 25 projects launched under Call 1 (of the FP7 ICT Programme). Upon optimisation, the methodology will then be communicated to the projects that will be funded in Call 5 (of the same Programme).

In the reporting period, SEQUOIA has begun to analyse each project's technological outputs. An assessment of the degree of innovation is necessary as part of the development of impact indicators, especially since for Call 5 projects of the FP7 ICT Programme, we aim to speak of *potential* impact more than about *real* impact.

The remit of Workpackage 4 'Dissemination and Assessment Methodology Transfer' is to disseminate and transfer the project assessment methodology to said Call 5 projects. In this way, the new projects will be able to self-evaluate their potential impact in terms of socio-economic benefits, and possibly re-orient their activities in order to improve such impact, in alignment with the EC policy for the Future Internet Society. The following diagram contextualises WP4 in relation to the other workpackages in the SEQUOIA project's.

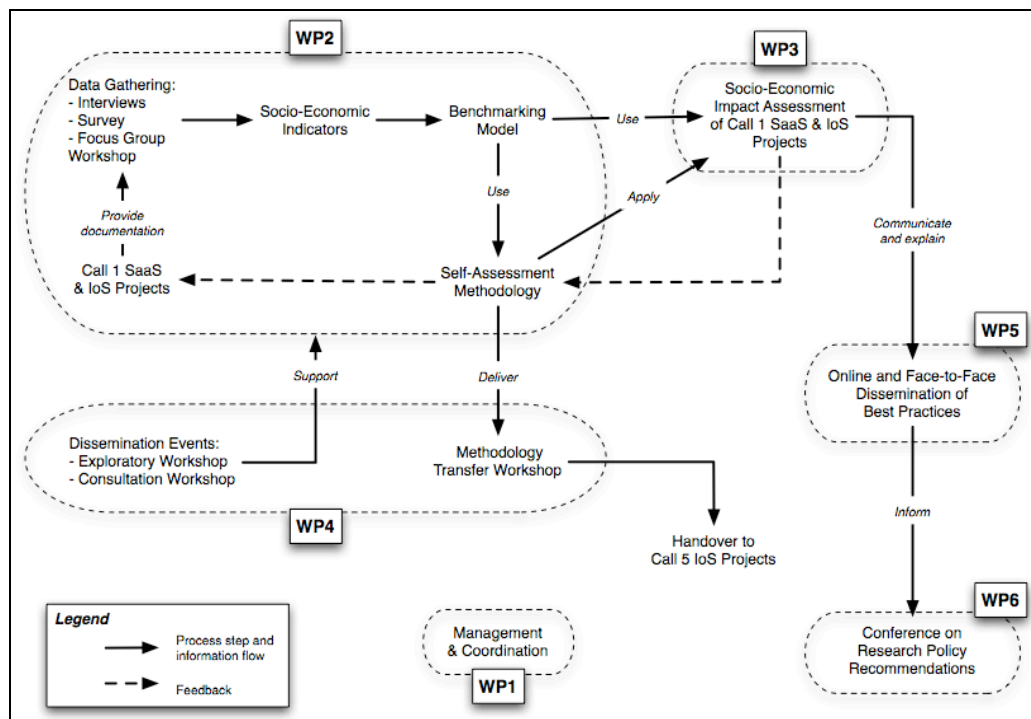


Figure 1. Pert diagram of SEQUOIA's workpackages with activity workflow details

From the onset, the Dissemination activities and deliverables went hand-in-hand with, and complemented, the technical and practical deliverables in order to arrive at and maximise the support that the SEQUOIA project seeks to deliver both to the designated call 1 and call 5 projects.

This particular deliverable ‘Methodology and best practices dissemination plan and dissemination tools’ describes the SEQUOIA project’s communication plan. As per the Description of Work (DOW), it will define the graphic identity of the project and will describe the dissemination process. The deliverable will also describe the process (and the channels, i.e. press releases, leaflets, web presence, etc) through which the SEQUOIA methodology and Call1 project’s best practices will be disseminated.

The following diagram shows a high level view of the approach being taken by SEQUOIA project and how dissemination fits into the research path.

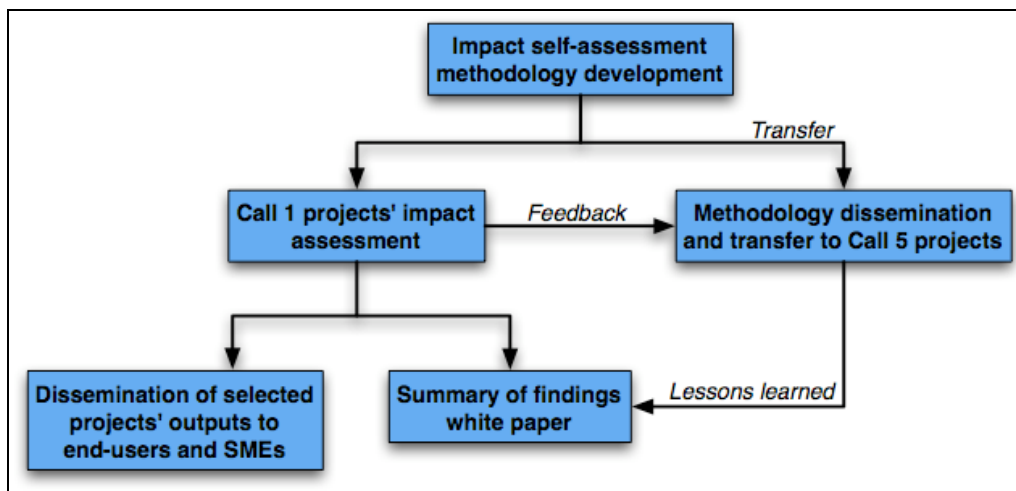


Figure 2. High-level view of SEQUOIA project’s approach

2. DISSEMINATION METHODOLOGY AND TOOLS

The dissemination methodology involves three different and interdependent kinds of activities:

- 1- External Dissemination. The more traditional activity is to disseminate to external audiences and events the results of our analysis through reports, publications and events.
- 2- Cluster Communications. A second activity is to reach out to the Objective 1.2 projects (mainly Call 5) to inform them about the specific aspects of our self-assessment methodology that they can adopt and apply.
- 3- Analysis and Mapping. The third activity is more analytical, and it involves mapping the dissemination activities of the Call 1 projects and classifying/ranking them in terms of typology and budget allocation. This classification is meant to correlate to similar classification diagrams discussed in D2.1. Finally, we would like to use this mapping to compare the dissemination activities of Call 1 and Call 5 projects.

These activities will be communicated to the HOLA! project in order to maximise synergies. Thus, depending on the insights provided by the analytical activity 3, we will be able to optimise 1 and 2, as well as the collaboration with HOLA!.

External Dissemination

Summary of process

At the beginning of this reporting period i.e. months one to six, the first port of call for the Dissemination activities in the SEQUOIA project was to make available to the consortium, the EC and particularly the first target audience (the 25 Call 1 projects as well as any other interested parties), information materials and tools that would enable them to familiarise themselves with and engage with the project. This was also the juncture at which the graphical identity of the project was established and communication artefacts and channels put in place so that, later on, the SEQUOIA methodology and the Call 1 projects' best practices could be disseminated.

The process by which each element was developed and decided upon was an open, iterative and collaborative one. For example with development of the logo, three Graphical Designers were asked to submit samples. Two were selected based on feedback from the key stakeholders and these were asked to provide additional, more specific prototypes. These prototypes were circulated to the consortium and a vote took place to choose the most preferred and representative logo. The logo was then iteratively fine-tuned according to feedback from the consortium.

The process by which artefacts such as the project website, factsheets and posters were created was run in a similar fashion: a first draft was created by those in the relevant workpackage, refined, and then circulated to the consortium for feedback and consequent sign-off.

In line with the DOW, the traditional definition of dissemination is one of a planned process whereby the project team provides relevant and timely information in an appropriate manner about the activities and outputs of the project to those stakeholders, potential users and others targets when outputs become available. In SEQUOIA, we have put in place first steps in place to go significantly further and create a dynamic community of potential users and researchers who will go on to take up and use the SEQUOIA methodology and results, so contributing to the exploitation of the project outputs.

Graphical Identity and Communication Artefacts

In the reporting period, the following dissemination artefacts were delivered to define the graphic identity of the project:

We began by developing a project logo:

The main message we wanted to convey were related to the idea of assessment. This is represented by the magnifying glass (the big grey circle) which represents the analysis and assessment aspects of the projects (represented by two small circles).

The SEQUOIA logo represents the starting point for the design and informed the graphical identity of the project. The website, poster and the factsheet are aligned to logo's colours and design elements.

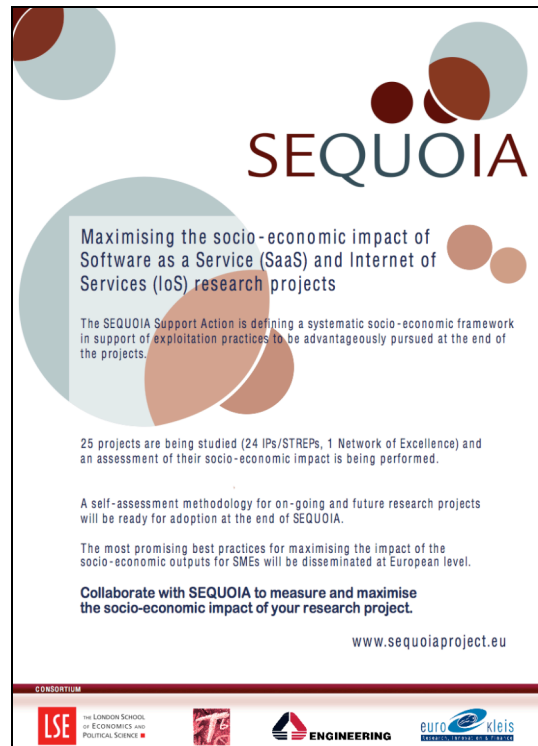


And then developed a project website: <http://www.sequoiaproject.eu>



The website provides access to materials about the project such as on the consortium itself, the research methodology, project documents such as deliverables, case studies, newsletters as they become available and so on. It links to related studies and projects. It also provides a password protected area for the project partners to collaborate and a multi media and sharing facilities. It is a key tool for communication as it is considered the first port of call for anyone wanting to find out more about the project and its aims and achievements. It has been designed to be visually clear and user friendly.

We also developed a Poster for use at events:



SEQUOIA

Maximising the socio-economic impact of Software as a Service (SaaS) and Internet of Services (IoS) research projects

The SEQUOIA Support Action is defining a systematic socio-economic framework in support of exploitation practices to be advantageously pursued at the end of the projects.

25 projects are being studied (24 IPs/STREPs, 1 Network of Excellence) and an assessment of their socio-economic impact is being performed.

A self-assessment methodology for on-going and future research projects will be ready for adoption at the end of SEQUOIA.

The most promising best practices for maximising the impact of the socio-economic outputs for SMEs will be disseminated at European level.

Collaborate with SEQUOIA to measure and maximise the socio-economic impact of your research project.

www.sequoiaproject.eu

CONSORTIUM

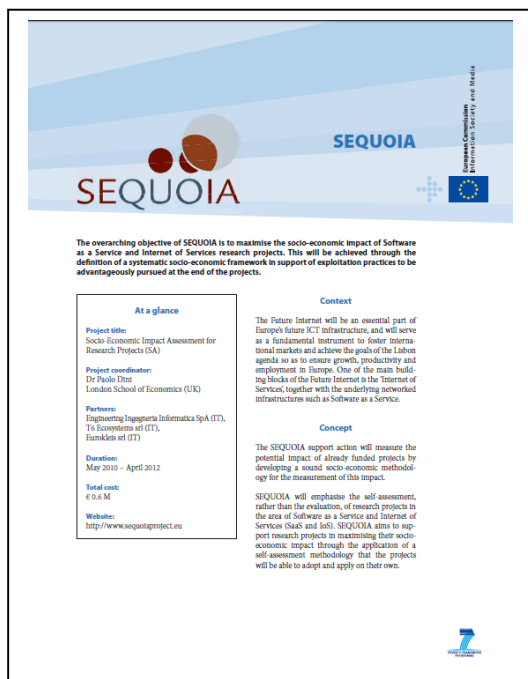
LSE LONDON SCHOOL OF ECONOMICS AND POLITICAL SCIENCE

ENGINEERING

europa-kleis

This Poster (A2 format) was originally prepared for the Collaboration meeting for FP6 & FP7 projects held on the 19th and 20th of October 2010 with the specific aim of informing parallel sessions by explaining the key features of the SEQUOIA project, and offering a particular focus on collaboration possibilities. The design was prepared by WP5 team and it will re-used as a template for any other Events that we will attend.

And a Factsheet:



SEQUOIA

The overarching objective of SEQUOIA is to maximise the socio-economic impact of Software as a Service and Internet of Services research projects. This will be achieved through the definition of a systematic socio-economic framework in support of exploitation practices to be advantageously pursued at the end of the projects.

At a glance

Project title: Socio-Economic Impact Assessment for Research Projects (SA)

Project coordinator: Dr Paolo Dini, London School of Economics (UK)

Partners: Engineering Ingegneria Informatica SpA (IT), Te Ecosystems srl (IT), Funktels srl (IT)

Duration: May 2010 – April 2012

Total costs: € 0.6 M

Website: <http://www.sequoiaproject.eu>

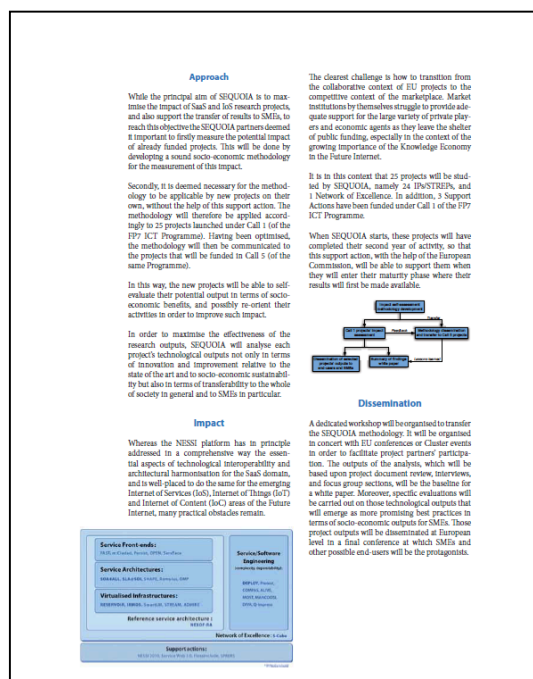
Context

The Future Internet will be an essential part of Europe's future ICT infrastructure, and will serve as a fundamental instrument to foster international markets and achieve the goals of the Lisbon agenda so as to ensure growth, productivity and employment in Europe. One of the main building blocks of the Future Internet is the 'Internet of Services', together with the underlying networked infrastructure such as Software as a Service.

Concept

The SEQUOIA support action will measure the potential impact of already funded projects by developing a sound socio-economic methodology for the measurement of this impact.

SEQUOIA will emphasize the self-assessment, rather than the evaluation, of research projects in the area of Software as a Service and Internet of Services (SaaS and IoS). SEQUOIA aims to support research projects in maximising their socio-economic impact through the application of a self-assessment methodology that the projects will be able to adopt and apply on their own.



Approach

While the principal aim of SEQUOIA is to maximise the impact of SaaS and IoS research projects, and also support the transfer of results to SMEs, to reach this objective the SEQUOIA partners deemed it important to firstly measure the potential impact of already funded projects. This will be done by developing a sound socio-economic methodology for the measurement of this impact.

Secondly, it is deemed necessary for the methodology to be applicable by new projects on their own, without the help of this support action. The methodology will therefore be applied accordingly to 25 projects launched under Call 1 (of the FP7 ICT Programme). Having been optimised, the methodology will then be communicated to the projects that will be funded in Call 5 (of the same Programme).

In this way, the new projects will be able to self-evaluate their potential output in terms of socio-economic benefits, and possibly re-orient their activities in order to improve such impact.

In order to maximise the effectiveness of the research outputs, SEQUOIA will analyse each project's technological outputs not only in terms of innovation and improvement relative to the state of the art and to socio-economic sustainability but also in terms of transdisciplinary to the whole of society in general and to SMEs in particular.

Impact

Whereas the NISS platform has in principle addressed in a comprehensive way the essential aspects of technological interoperability and architectural harmonisation for the SaaS domain, and is well placed to do the same for the emerging Internet of Services (IoS), Internet of Things (IoT) and Internet of Content (IoC) areas of the Future Internet, many practical obstacles remain.

Dissemination

A dedicated workshop will be organised to transfer the SEQUOIA methodology. It will be organised in concert with EU conferences or Cluster events in order to facilitate project partners' participation. The outputs of the analysis, which will be based upon project document review, interviews, and focus group sessions, will be the baseline for a white paper. Moreover, specific evaluations will be carried out on those technological outputs that will emerge as more promising best practices in terms of socio-economic outputs for SMEs. These project outputs will be disseminated at European level in a final conference at which SMEs and other possible end-users will be the protagonists.

Service Front ends: Web interfaces, mobile devices, etc.

Service Architectures: Reference, Business, Control, Services, Data

Virtualised Infrastructures: Hardware, Virtual Machines, Operating Systems, etc.

Reference service architecture: Reference service architecture

Network of Excellence: Network of Excellence

Support actions: SEQUOIA Support Action

The SEQUOIA Factsheet was drafted at the beginning of the Project. Print-outs of the SEQUOIA factsheet are planned for distribution to interested parties at events in the course of the project to provide an overview of the main aims of SEQUOIA. It highlights that the SEQUOIA approach focuses on *supporting* Projects rather than *evaluating* them.

Cluster Communications

Months 1-6

Part of our approach with respect to dissemination is to ensure we establish and maintain meaningful linkages to other EU projects investigating the same domain and also with EU Commission representatives. To this end, at the recent 'Internet of Services of Services 2010: Collaboration meeting for FP6 & FP7 projects' on the 19th and 20th of October, we were afforded the opportunity to forge concrete face-to-face contacts with many of the projects in both Calls 1 and 5 and circulate the initial questionnaires. SEQUOIA also co-led a working session on 'Socio-Economic Impact Assessment for Research Projects' with the HOLA! SA project team.

Alongside our colleagues leading the research elements of the project, the dissemination team presented the cluster dissemination activities of the project. Furthermore, the SEQUOIA team actively participated in interactive brainstorming with the HOLA! project and other participants to work jointly on the identification of dissemination needs from the projects and determine concrete services to increase the impact of FP R&D in the area of Internet of Services so as to help the projects maximise the future use of knowledge and exploitation of results. Participants were given a unique chance to propose, comment and evaluate actions in relation to these aims and related dissemination services and activities, also aiming at aligning them with dissemination efforts foreseen in other projects and their real needs in relation to achieving project impact.

Our links with the HOLA! SA project team will particularly help us to disseminate the Call 1 projects' results and link them with SMEs and other potential users. Going forward we will then be able to disseminate the SEQUOIA methodology to the Call 5 projects and impart the culture of impact assessment to across EU projects in the ICT sector. While the main objective of the project's dissemination is clearly raising awareness and sharing the project methodology and assessment tools in an enduring way within the scientific research community around EU funded projects in the Objective 1.2, all of the project partners are committed to disseminating to the largest possible audience the concepts and novel solutions of SEQUOIA results in new domains, promoting such exposure through high-quality papers at premier conferences and workshops, thus guaranteeing the desired degree of interaction with a broad audience at the international level.

This will also ensure that the knowledge created by the project and well as the community/interest groups growing around its users will be sustainable after the funded life time of the project.

Project communication and engagement strategy

After the identification of the set of case studies that will be part of the SEQUOIA assessment activities, information on each project was gathered by reviewing grey literature such as fact sheets and reports from the selected projects.

The projects were approached via an invitation e-mail that was sent to the project coordinator. A soft approach was then used to collect further information on each project. A preliminary questionnaire was also sent as a high-level, succinct, interesting request to the respondent and at the same time offering useful information for the project team to feed into the methodology development and assessment activities.

Months 7 to 24

SEQUOIA's continued overarching objective will be achieved through the following sub-objectives:

- 1- Chart the current socio-economic impact of Call 1 projects through a customised methodology
- 2- Support Call 1 best practices/technological outputs dissemination
- 3- Support Call 5 projects in their self-assessment and in the maximisation of their potential impacts
- 4- Summarise our findings in a white paper that can benefit FP7 and FP8 projects' impacts on the European society and economy

At the event of the forthcoming EC review, the SEQUOIA project team will carry out focus groups during its first workshop which will be supported by the dissemination team. The dedicated workshop and focus groups will be designed to transfer the SEQUOIA methodology, and will be easy to understand and also easy to follow for non-specialists. The workshop will be delivered in concert with EC review in order to facilitate project partners' participation. The outputs of the analysis, which will be based upon project document reviews, interviews, and focus group sessions, will feed the generation of a white paper for wider dissemination.

Analysis and Mapping

The following diagram shows how the SEQUOIA dissemination strategies/tools may be best suited for engagement with the various projects that we hope to support. At the time of writing, we are engaging with and awaiting feedback as regards the suitability of our mapping and are hoping to shortly refine this mapping for practical use. We will then provide the final mapping as agreed with the projects in the next version of this deliverable. The placement or mapping of projects here is therefore, for now, a best guess (albeit informed) scenario. This mapping will for example help us to work closely with the HOLA! SA project team to maximise the impact of the results of the Call 1 projects.

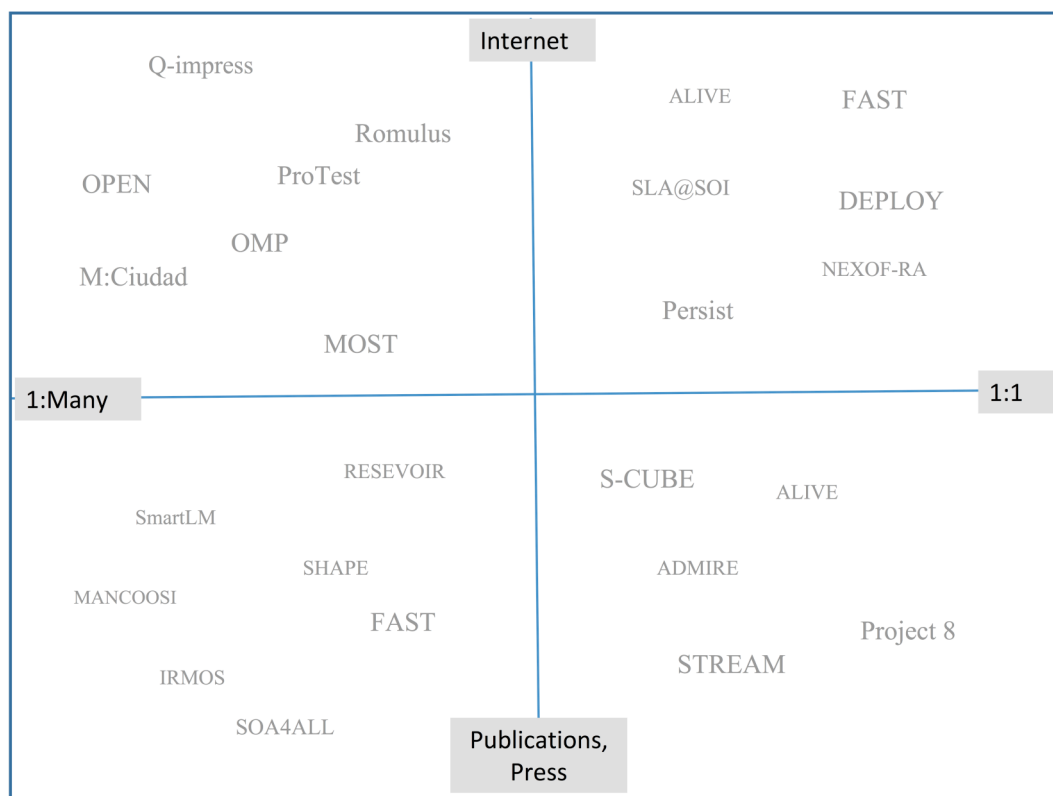


Figure 3. Mapping of dissemination instruments based on estimated target users

3. FUTURE PLANS

During the project lifetime the team will maintain and enforce liaisons and cooperation with SEQUOIA use cases/targeted projects. It will also update dissemination material and organise and participate in events as described below.

Website

The website will be maintained and updated during the entire project lifetime. In particular two sections, namely the Methodology and Use Cases ones will be further updated and expanded upon. The Methodology section update will also show the cooperation of WP5, WP2 and WP3 in order to provide a clear description of the indicators used and processes to be followed within the self-assessment methodology. The Use Cases section will be a showcase for the projects cooperating with SEQUOIA and provide information on each one respectively.

Future events

With reference to the participation and organisation of events, the SEQUOIA dissemination team will support the forthcoming focus group sessions. The SEQUOIA project team will also participate in Collaboration Meetings organised by the funding EC unit and participate in public events related to the project objective in order to further promote and collect feedback on the methodology.

Other dissemination

Dissemination material to be used for communication towards the general public and/or the use cases will be updated. New material will be produced according to Project needs.