Research and Innovation Action

Social Sciences & Humanities Open Cloud

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Deliverable 6.1 Community Engagement Strategy

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Abstract: This document builds on an initial stakeholder landscape analysis, emphasizes strategic coordination and outlines WP6 engagement activities. The planned engagement activities are horizontal to the project and account for networks, channels and tools already used by project partners. Gaps and risks are also identified.

History

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Executive Summary

The project aims to build a fully-fledged Social Sciences and Humanities Open Cloud (SSHOC) where users of Social Sciences and Humanities (SSH) data are provided with data, tools and training materials. SSHOC plays a key role in the realization of Europe's Open Science agenda and the European Open Science Cloud (EOSC).[1]

This community engagement strategy outlines how the project will engage with the SSHOC community coherently and efficiently, thereby fostering community engagement, developing a data-sharing culture which follows the FAIR principles, and giving user communities knowledge, skills and expertise so that they can use and contribute to SSHOC resources.

The strategy also describes the stakeholder categories identified in the *SSHOC Overall Communication and Outreach Plan*,[2] and follows a stakeholder landscape analysis performed by project partners. It explains why the SSHOC project should engage with these stakeholders, outlines key messages and value propositions for each group, and shares the most effective channels and approaches to be used. Collaboration between project Work Packages (WPs) and coordination of timeline of engagement activities, will create a storyline of engagement for each group. This is critical in order to gain a certain level of commitment.

It is important to note that project partners already represent a big part of the SSH community. This strategy therefore builds on existing networks, channels and tools. Furthermore, collaboration with other EOSC-relevant projects will be at the core of activities. The strategy is complemented by a set of KPIs based on identified needs and assigned activities to project partners, as per the Grant Agreement. Provisions for possible gaps and risks are also addressed.

This Community Engagement Strategy is in line with the activities of the SSHOC Overall Communication and Outreach Plan, keeps and intentionally flexible timeline, in order to be able to adapt to current EOSC developments and will be complemented by the training activities of a sound Building Expertise Strategy to be delivered in December 2019.

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[1] SSHOC Grant Agreement

[2] https://sshopencloud.eu/d21-sshoc-overall-communication-and-outreach-plan

Abbreviations and Acronyms

EOSC	European Open Science Cloud
ERIC	European Research Infrastructure Consortium
ESR	Early Stage Researcher
GDPR	General Data Protection Regulation
IPR	Intellectual Property Right
KPI	Key Performance Indicator
OSPP	Open Science Policy Platform
OS	Open Science
RI	Research Infrastructure
SSH	Social Sciences and Humanities
SSHOC	Social Sciences and Humanities Open Cloud
WP	Work Package

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1. Introduction

1.1 Objectives

This strategy identifies effective approaches for engaging with each stakeholder group in the SSHOC network. It builds on the work of other Work Packages (WPs) and *D2.1 SSHOC Overall Communication and Outreach Plan*,[3] to maximise the impact of SSHOC and to provide the outlined groups with:

- A deeper understanding of the project's purpose and activities, via tailor-made messages and opportunities;
- Increased awareness of how to benefit from the project's outputs and from participating in the project's activities;
- An opportunity to build and contribute to the SSHOC, in line with each group's expertise and needs.

Engagement with stakeholders will take place at three levels.

INFORMATION SHARING

Before stakeholders can be engaged, they must first have access to basic information about the SSHOC project. The project will therefore ensure that stakeholders receive relevant information about its activities, events, services and decisions on a regular basis. Stakeholders will also be targeted with specific and relevant messages. In this way, they will be ready to engage and contribute to the project's outputs and shape them based on their communities' needs. A detailed communication plan has been developed by WP2, which defines the strategy, foreseen activities and channels for communication and outreach throughout the project. Communication will be complemented by specific engagement activities, especially by T6.2 *Fostering Communities: Engaging New & Existing Users,* such as a minimum of 6 workshops (1 from the Humanities perspective, 1 from the Social Science perspective, and 4 with cross-disciplinary), a series of 6 awareness webinars in collaboration with other WPs, a mid-project SSHOC Stakeholder Forum to showcase project progress and achievements and engage with a broader range of SSHOC stakeholders and other European initiatives and a SSHOC Final Conference, to name a few, as well as the training activities of the Building Expertise Strategy to be delivered in December 2019.

CONSULTATION

Stakeholders will be asked to share their comments, information and experience as it relates to the work of the SSHOC project. This will be done both at a group level (e.g., through discussions and brainstorming sessions at workshops, question-and-answer at webinars and following conference presentations) and

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[3] https://sshopencloud.eu/d21-sshoc-overall-communication-and-outreach-plan

on an individual basis (e.g., through surveys and other post-event follow-up activities). This feedback will be gathered after each event and shared within the project, in order to inform the project's work. Furthermore, reports on workshops and webinars organised by WP6 will be public.

COMMUNITY INVOLVEMENT

SSHOC will give stakeholders multiple opportunities to actively shape and build the SSH Open Cloud and its services: through consultation meetings, technical workshops, testing the SSHOC Marketplace with user groups and creating an editorial board for the Marketplace, to name a few. Disciplinary and geographical diversity will be considered. During these events, stakeholders will be invited to participate in and contribute to specific project activities, according to their expertise and the characteristics of their stakeholder group. Awareness and training activities will not remain on a one-way communication side: the intention of the project is to actively involve the communities in the shaping of the SSH Open Cloud and in ensuring their commitment to it. An important aspect that needs to be considered is the fact that the project partners already represent a large part of the SSH community. Being end users and multipliers at the same time, using their established networks, channels and tools, will guarantee the uptake of the SSH Open Cloud. This will be further complemented by a train-the-trainer approach of the activities included in the Building Expertise Strategy (p.eg. the SSHOC trainer network and the SSHOC train-the-trainer toolkit).

1.2 Identifying Stakeholders and Engagement Approaches

The identification of relevant stakeholder groups for the SSHOC project, was performed by project partners during the project proposal stage, so that engagement could begin as soon as possible. The selection of the stakeholder categories was informed by the main EOSC stakeholders as identified by the EOSC pilot project,[4] the recommendations of the Open Science Policy Platform (OSPP)[5] and insights from SSHOC partners. Adjustments have been made, considering developments with the EOSC.

D2.1 identifies eight primary stakeholder categories.

FIGURE 1: SSHOC STAKEHOLDERS

To facilitate engagement with each of these groups, a Stakeholders Mapping Database has been created. It identifies specific organisations within each stakeholder group, as well as the connections, networks, channels and tools already in place between SSHOC partners and each group.

Building the database was a collaborative effort between project partners. A mapping exercise was carried out, during which each project partner shared their knowledge of and contacts within existing networks. This Community Engagement Strategy builds upon the first version of the Stakeholders Mapping Database. The Database is a living spreadsheet, GDPR compliant, that will be updated periodically by the consortium within the project's lifetime.

The results of the initial stakeholder mapping exercise, given the fact that SSHOC is an EOSC cluster project, hence the project partners already represent a big part of the SSH community, showed that the main stakeholder categories of the project are Research Libraries and Archives, Researchers (Research networks and associations), Research and e-Infrastructures, and Universities and Research Performing Institutions. The information this initial landscape analysis provided was: the main stakeholders that belong in each of the stakeholder groups that the project targets, the geographical distribution of these stakeholders, the discipline(s) they belong to, the specific SSHOC WPs targeting each category, as well as the networks, channels and tools that project partners already have in place. This exercise will be repeated, and the Stakeholders Mapping Database will be updated during the project to ensure effective and targeted stakeholder engagement.

The database also identifies the disciplines of specific stakeholders, based on a list that was defined in the Standardization Survival Kit[6] developed by the EU-funded Parthenos project[7].

TABLE 1: LIST OF SSH DISCIPLINES

List of disciplines:[8]	
Archaeology and Prehistory	History, Philosophy and Sociology of Sciences
Architecture, Space Management	Law
Biological Anthropology	Linguistics
Classical Studies	Literature
Communication Sciences	Management
Cultural Heritage and Museology	Methods and Statistics

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[6] http://ssk.huma-num.fr/#/
[7] http://www.parthenos-project.eu/
[8] http://ssk.huma-num.fr/#/vocabularies/disciplines

Demography	Musicology and Performing Arts
Economies and Finances	Philosophy
Education	Political Science
Environmental Studies	Psychology
Gender Studies	Religions
Geography	Social Anthropology and Ethnology
History	Sociology

In addition to its relevance for this deliverable, the information on training staff, tools and training materials in the database will be used for the purposes of *D6.2 Building Expertise Strategy*.

This activity further links to the training needs of the project. The mapped learning and training materials will be catalogued, and new ones will be produced based on the gaps and needs identified through the mapping exercise. This relates to the main focus of WP6: to ensure that the SSHOC infrastructure provides users with a coherent set of organized training materials, so that they have the necessary skill sets and expertise to use the tools, services and data available in the SSHOC and the EOSC effectively and appropriately.

Task 6.2 Fostering Communities: Engaging New & Existing Users will partly build on the needs defined by this strategy. In collaboration with WP2 and other project partners, it will work towards broad engagement with the identified target communities. For this purpose, two-way communication will be adopted to share the project's progress with existing and new user bases and to ensure that feedback from the communities effectively informs project work across all WPs.

2. Engagement Channels and Instruments

SSHOC will use various channels and instruments to engage with stakeholders. These will be tailored to the target audience, the message that needs to be conveyed and the purpose of the engagement. The channels and instruments are as follows:

- **SSHOC website**: The project website holds all project-related materials (news, developments, deliverables, etc.) and is the home to the SSHOC Marketplace, where stakeholders can access technologies and services, innovation mechanisms in data production, use cases and training materials. Industry players, data producers, data users and reusers of various SSH disciplines are expected to be the main users of the Marketplace.

- **Social media:** Twitter, LinkedIn and YouTube will be used to connect and engage with all SSHOC stakeholders.

- **Workshops and consultations:** Through project-run workshops and consultation meetings, stakeholder groups will be asked for feedback and involved in building the different components of the SSHOC.

- **Training events:** Training sessions will focus on the practice of working with data, and on the best ways to adopt and leverage SSHOC (as well as EOSC) tools, services, and data in conducting research in SSH.

- **Conferences (both SSHOC-organized and third-party events)**: Conferences and SSHOC participation in third-party events will help to build partnerships, raise awareness about the SSHOC and expand the SSHOC stakeholder community.

- **Webinars:** Webinars will provide a means to reach out to, engage and train (e.g., by presenting new and existing tools for data creation and data reuse delivered by the project) stakeholders from various disciplines, including the user community of SSHOC.

- **Surveys:** User feedback and input will be collected (e.g., on existing European vocabularies in the SSH field as needed for D7.6), in order to identify gaps and needs of stakeholder communities for an informed and effective project work.

- **Interviews:** Individual interviews will be carried out to get a better understanding of stakeholder needs and expectations of the SSHOC.

- **Pilot studies:** The project will engage with research groups of three disciplines and aims to identify problems and obstacles in using the SSHOC resources through these pilot studies. The pilot studies will also serve as best-practice examples for future studies.

- **Posters:** Posters and poster presentations will boost stakeholders understanding and participation in the project.

- **Information materials (newsletters, fact sheets, flyers etc.):** Information materials typically serve to inform stakeholders and raise awareness about the project and its developments. Awareness and familiarity with the project will enable more efficient and effective engagement with stakeholder communities.

Furthermore, the **SSHOC Consortium's existing network, channels and tools** will be leveraged and extended during the lifetime of the project and beyond. This network includes, but is not limited to, groups, projects, associations and events listed in the table below. All SSHOC project partners play a significant role in the engagement activities, as they are already part of the community the project targets and therefore can amplify key messages, bringing higher visibility to the project.

TABLE 2: INDICATION OF SSHOC CONSORTIUM'S EXISTING NETWORK

Relevant funded projects / initiatives to boost engagement and outreach through synergies	
European Social Survey	www.europeansocialsurvey.org
RISCAPE project (to Dec 2019)	www.riscape.eu
DESIR, PARTHENOS	www.parthenos-project.eu
Scientific and research associations	
European Survey Research Association	www.europeansurveyresearch.org
World Association for Public Opinion Research	https://wapor.org
The Alliance of Digital Humanities Organizations	https://adho.org
The European Association for Digital Humanities	https://eadh.org
Scientific events	
DARIAH Annual Meeting	
CLARIN Annual Conferences	
Digital Humanities Conferences	
European Survey Research Association Conference	
European Social Survey International Conference	

Annual Comparative Survey Design and Implementation Workshop
Bi-annual LREC meeting
Scientific journals and open access publications
Digital Scholarship in the Humanities (DSH)
Digital Humanities Quarterly (DHQ)
Survey Research Methods
Public Opinion Quarterly

WP2 in collaboration with WP6 has developed a shared spreadsheet to identify engagement activities/opportunities for the project, as well as synergies between activities of SSHOC work packages and external actors. This events' list will regularly be updated by project partners to ensure coordination of activities and targeting of all appropriate audiences, thus maximizing engagement and impact.

3. Stakeholder Mapping and Engagement Strategy

This section outlines each stakeholder group, its landscape, and its connection to the SSHOC project. Key messages, effective engagement channels, and specific engagement activities are also identified. The activities identified in this subsection are provisional and will regularly be revised during the project's lifetime, as needs and opportunities evolve.

3.1 Researchers

3.1.1 Landscape

Researchers may work independently or in affiliation with universities, institutions, industry and (non-governmental organizations, and can be at many different stages of their research career. They are a diverse group and — for SSHOC — critical to reach as they are both data producers and data users.

This stakeholder landscape is particularly fragmented and complex, for two reasons: first, researchers are active in numerous SSH disciplines and, second, they are part of institutions with different internal structures and management policies. Because of this, SSHOC will mainly target research networks as suggested by the results of other EOSC related projects such as EOSCpilot,[9] rather than individual researchers. These networks include learned societies, research communities, scientific and professional associations, and are part of a broader SSH domain, including scientists who integrate computational approaches into their research work.

The SSH domain is dotted with numerous research networks. They can be represented by communities that form in the framework of COST Actions[10] and other networks. Institutionalised communities are often organised by country, language, discipline or other concepts. They exist on different levels in very different sizes.

Researchers are primarily focused on the advancement of methods to improve analytical processes in the domain. However, they also invest significant effort in the research data life cycle and tools to process their data. In this sense, SSHOC sees great potential to work with this stakeholder category. Together with researchers, the project can create one of the fundamental layers of SSHOC: seamless access to high-quality research data. For the research community, SSHOC will offer specific workshops and webinars on using SSHOC services. The project aims to equip early-career researchers with knowledge

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[9] https://eoscpilot.eu

[10] COST Actions are research networks created in the framework of the COST (The European Cooperation in Science and Technology) funding organization. These networks offer an open space for collaboration among scientists across Europe (and beyond). Researchers can create a network based on their own research interests and ideas by submitting a proposal to the COST Open Call. It is also possible to join ongoing Action.

to help them exploit the full potential of SSHOC, to promote Open Science (OS) and the use of computational research methods.

In addition, through WP7 *Creating the SSH Open Marketplace*, SSHOC has recently conducted 22interviews with individual researchers. These interviews focused on defining user requirements for the SSHOC Open Marketplace and contribute to the establishment of key relationships with this stakeholder category. The methodology that was followed splits the SSH fields in six main sub-categories and differentiates early stage researchers (ESR) from experienced ones to uncover specific patterns and needs.

3.1.2 Key messages, engagement channels and instruments

KEY MESSAGES

> If you want your discipline and research to be more visible and recognized, engage with Europe's Social Sciences and Humanities Open Cloud (SSHOC). Bring your research data and papers, share your workflows and needs.

> By depositing your research data and papers, sharing your workflow and expressing your needs in your field of study through the SSH Open Cloud, you are contributing to a less fragmented research data landscape.

> SSHOC also encourages researchers to reuse curated data and developed tools and services for improved efficiency and productivity.

ENGAGEMENT CHANNELS AND INSTRUMENTS

The project will **directly contact research networks,** whose researchers represent potential SSHOC users.

Furthermore, the project will elaborate on how its activities can add value to researchers' day-to-day work, actively involve them in the development of the project through **workshops, events and interviews** to gather their input, provide resources and solutions (e.g. tools for analysing, storing and accessing data, self-assessment, increased visibility, legal support), as well as with training materials, that will help them use the common open cloud in the SSH domain.

Training will be provided in several forms. The emphasis will be on **workshops and webinars** that will be offered at major events of a particular research community (e.g. at the Digital Humanities conference) and whose resources (recordings, presentations, summaries, etc.) will remain accessible after the end of the project in an appropriate repository (e.g. Zenodo), thus ensuring the continuation of knowledge transfer. A concrete Building Expertise Strategy will be created for the training needs and purposes of the project overall. Further support and cooperation will be offered through **mailing lists** and **personal contact** (also see: section 6 of this document *Addressing potential risks/GDPR*), as well as channels/tools the project partners already have in place (e.g., CLARIN's Knowledge Centres). Participation in workshops is important to broaden the professional network of researchers which can then be maintained through mailing lists together with general SSHOC news circulation. In this sense, **co-location of workshops at third party events** can be an important contribution to the recognition of SSHOC in that research community.

3.1.3 Stakeholder-specific engagement activities

Many engagement activities are planned in the project's timeframe with conferences, workshops and webinars being the most common. They will address specific topics relevant to researchers' needs. These needs will be identified through direct contact with research networks. Some of these activities include:

- Interviews with researchers to gather input for user requirements for the SSH Open Marketplace (interviews will be carried out by *Task 7.1 User requirements, Conceptual Model and System Architecture of the SSH Open Marketplace*)

- Testing user interface and prototypes of SSHOC Marketplace (by Task 7.2)

- Marketplace Editorial Board - to support the work of *T7.4 on Governance: Population, Curation & Sustainability of the SSH Open Marketplace*

- Trainings and learning events

- Train-the-trainer Bootcamps

3.2 Research and e-Infrastructures (EOSC Thematic Clusters)

3.2.1 Landscape

The European Commission defines Research Infrastructures (RIs) as "...facilities that provide resources and services for research communities to conduct research and foster innovation".[11] More than this, RIs need to be considered as pan-European players in the research landscape representing their respective communities. Their long-term perspective and support from Member States — combined with their

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[11] https://ec.europa.eu/info/research-and-innovation/strategy/european-research-infrastructures_en

supra-institutional and supra-national nature — makes them stable agents with sufficient weight to advocate for researchers on a global scale.

Since all five European research infrastructures within the SSH cluster are SSHOC project partners, they are at the core of the project. SSHOC is considered by each of them as a major EOSC enabler for their respective communities. Interaction with other domains will be pursued to uncover synergies and best practices through other ERICs, the other EOSC cluster projects (ENVRI FAIR[12], PANOSC[13], ESCAPE[14] and EOSC-Life[15]) and the activities of the EOSCsecretariat,[16] especially through its co-creation calls[17] and liaison platform[18].

E-infrastructures are consortia formed by (mainly academic) computing centres providing generic technical facilities, like computing, storage and networking capacities/resources for digitally enabled research.

Although individual research groups, or even researchers, could enter into agreements and interact with e-Infrastructures, it seems more natural, efficient and effective for the research infrastructures to act as intermediaries. They are inherently well informed about the needs of the individual communities of practice and have the critical mass to negotiate bulk deals with e-Infrastructures regarding provisioning of computing resources. SSHOC can be seen as a major endeavour on this cross junction of delivering thematic and domain-specific services to the community integrated into the pan-European technical infrastructure, which EOSC is about to become.

The internal organisation of individual RIs varies, but in general all are interwoven structures of national, technical and scientific or topical dimensions. Especially relevant for the engagement strategy is the inherent outreach capacity of the RIs to their respective communities. Each RI is represented in numerous Member States and has established direct communication channels to hundreds of professionals (researchers as well as people responsible for technical infrastructures) from dozens of institutes. Since the five RIs of primary concern are SSHOC project partners, reaching out to this stakeholder group should be straightforward. One aspect to take into consideration is the assumed duality of a RI as a central European organisation on the one hand, and as a discipline-specific community of researchers dispersed over the whole continent. When we talk of "community engagement", the communities grouped in and represented by the RIs and e-Infrastructures are arguably one of the project's primary target groups, whose needs and concerns are central to and are the driving force of the whole SSHOC endeavour.

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[12] http://envri.eu/envri-fair/
[13] https://www.panosc.eu/
[14] https://www.eso.org/public/announcements/ann18084/
[15] http://www.eosc-life.eu/
[16] https://www.eoscsecretariat.eu/
[17] https://www.eoscsecretariat.eu/co-creation-calls
[18] https://www.eoscsecretariat.eu/eosc-liaison-platform

3.2.2 Key messages, engagement channels and instruments

KEY MESSAGES

SSHOC is an opportunity for RIs to build bridges between their communities and the EOSC.

SSHOC brings research communities (as users) to e-Infrastructures.

SSHOC opens up a space for research infrastructures and e-Infrastructure to work on common solutions for the research/scientific community (in the SSH domain).

SSHOC allows the technical solutions developed and provided by individual RIs to be pushed to next integration level, potentially also opening them up for broader audiences.

ENGAGEMENT CHANNELS AND INSTRUMENTS

Communication with e-Infrastructures is ensured through numerous EOSC-related channels, such as EOSC-relevant projects (e.g. EOSC-hub, other EOSC cluster projects, etc), relevant events and co-location of activities, when possible. Numerous SSHOC project partners are already involved in other EOSC-related activities.

One pragmatic communication channel is the EOSC-portal[19] including the EOSC-marketplace, through which a process for allocating computational resources provided by individual e-Infrastructures partners can be initiated.

The main goal of the communication is to establish a constructive relationship on equal terms, e-Infrastructures acknowledging the representative and broker role of RIs for their respective communities. This includes translating the needs of researchers into terms "understood" by e-Infrastructures, which in general follows the paradigm of XaaS ("everything as a service"). "On equal terms" means that the potentially necessary adaptation performance to ensure convergence of the

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[19] https://www.eosc-portal.eu

technical setup on the side of the RIs and the facilities offered by the e-Infrastructures needs to be mutual.

Special attention will be required to sort out potential functional overlaps between services provided by RIs and e-Infrastructures, the most prominent example being numerous metadata catalogues. Acknowledging that there will be no one solution or single-entry point for "everything", the guiding principle is that of harmonic co-existence, with clearly defined functional and content scopes, allowing the user to make an informed decision about which service best serves the task at hand.

3.2.3 Stakeholder-specific engagement activities

In addition to the continuous information flow ensured by the direct involvement of the research infrastructures in the project, the annual meetings of individual RIs are of key interest for communicating the progress of the project and soliciting input from these communities. For example, the DARIAH Annual Event takes place in May, and CLARIN's Annual Conference in early autumn (September 2019, Leipzig, Germany).

For communication with e-Infrastructures, EOSC-related events will be monitored by the project.

3.3 Research Libraries and Archives

3.3.1 Landscape

Research libraries and archives are an essential part of the research and scholarship ecosystem. They support, promote and enable OS and research production. Many actively serve the SSH community.

Proof of this can be seen in the results of a recent survey (*Europe's Digital Humanities Landscape: A Report from LIBER's Digital Humanities and Digital Cultural Heritage Working Group*) by LIBER, Europe's largest association of research libraries and a SSHOC project partner, on digital humanities activities within libraries.[20] A quarter of LIBER's 450 members indicated that they are actively working with SSH researchers. Furthermore, LIBER has a working group on Digital Humanities & Digital Cultural Heritage.[21]

Since research libraries and archives have such close contact with SSH researchers, they have a dual role as users and intermediaries. They are ideally placed to advocate for and raise awareness of the SSHOC, and to support and train the researchers who will use the SSHOC. Engaging with this stakeholder group is therefore critical if SSHOC is to reach its target user base and achieve its objectives.

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[20] https://libereurope.eu/blog/2019/06/21/dh-survey-2019/
[21] https://libereurope.eu/strategy/digital-skills-services/digitalhumanities/

In return, SSHOC can offer research libraries and archives an opportunity to contribute to the shaping and development of the SSH Open Cloud, based on their knowledge of the types of tools and services required by SSH researchers.

3.3.2 Key messages, engagement channels and instruments

KEY MESSAGES

> Research libraries and archives are the channels through which knowledge and data will reach the EOSC. It is therefore critical that they share their needs and experiences with the SSHOC project, so that the SSH Open Cloud can be tailored to the needs of both the libraries and their researchers.

> The SSHOC will contribute to more data deposited with less effort as well as increased visibility and value of data to scientific communities

> The SSH Open Marketplace will feature existing and useful resources, tools and services which can help libraries to better reach out to SSH communities. Get involved and contribute to the shaping of the SSH Open Cloud!

ENGAGEMENT CHANNELS AND INSTRUMENTS

Research libraries and archives have direct contact with scholars, researchers and other end users of the SSHOC. It is therefore critical that the project engages with this community. Several channels and instruments have been identified to facilitate this engagement, including conferences and workshops, webinars, surveys and interviews, the SSHOC website and social media channels.

3.3.3 Stakeholder-specific engagement activities

As a partner in the SSHOC project and the leader of Work Package 6, LIBER, an association of 450 research libraries across Europe and global partnerships, has many ways to ensure that research libraries and archives are aware of and participate in shaping the SSH Open Cloud. This work has already started, with

a first SSHOC project workshop[22] held in June 2019 at LIBER's Annual Conference. Over 100 people attended this workshop, organised by project partners CLARIN, DANS, DARIAH and LIBER to highlight the project, the planned SSH Open Marketplace and activities towards building expertise for users, such as the SSHOC Training Network and Toolkit. Through an interactive session, participants had the opportunity to share their training needs and expectations towards the SSHOC Marketplace.

LIBER will promote and relay information about SSHOC project activities, and will continue gathering feedback on the needs of libraries at its Annual Conference (LIBER 2020, which will take place in June 2020 in Belgrade), other events and through a range of channels, such as involving in the discussion relevant LIBER working groups.[23] Examples of specific channels to be used to engage with libraries:

- LIBER mid-term event (from 2020 onwards);

- Social media (including LIBER's 6,200 Twitter followers, many of them research libraries/archives);

- Mailing lists (625 on the LIBER-ALL network list; 270 on LIBER Alerts general newsletter).

- LIBER Working Groups

In addition to the LIBER engagement channels, the project will target Research Libraries and Archives through its geographically distributed workshops, awareness raising and training webinars as well as its mid-project Stakeholder Forum.

3.4 Universities and Research Performing Institutions

3.4.1 Landscape

Universities and research performing institutions represent a system of higher education institutions and research centres, which are indispensable for the promotion and advancement of science. In particular, with this stakeholder category we refer to all EU universities and research institutions that are part of the SSH domain. As a means of illustration, in the Digital humanities domain (covering various disciplines) CLARIN has identified[24] 113 universities and research institutions in 28 countries. This stakeholder category plays a significant role in the uptake of the SSH Open Cloud, as, like in the case of research libraries and archives, universities and research performing institutions also hold the role of intermediary with researchers and scholars.

The challenge in targeting this stakeholder category comes from its diversity. Institutions come in many different sizes, with a wide range of funding levels and specialization of individual entities in the category. Due to this diversity, as well as the impact of national legislation, a generic approach to targeting this

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[22] https://www.sshopencloud.eu/news/social-sciences-humanities-open-cloud-what%E2%80%99s-it-research-libraries
[23] https://libereurope.eu/strategy/working-groups/
[24] https://registries.clarin-dariah.eu/courses/

stakeholder category will not suffice. To ensure success, the SSHOC project will take a harmonised approach and will ensure the direct participation of members of this stakeholder category.

SSHOC can help with one issue facing this group: the fragmentation of infrastructure and data across Europe and bound to individual institutions. This impedes the exchange of research data that is necessary for the scientific progress. By pooling, harmonizing and developing user-friendly tools, SSHOC aims to bridge this fragmented landscape and thus enable research institutions to make an even better use of research resources. SSHOC will also further support the intermediary role of this group by targeted communication, engagement and training activities.

3.4.2 Key messages, engagement channels and instruments

KEY MESSAGES

By collaborating with SSHOC, you can make sure that our research data and tools as well as our training services and materials match the needs of your students and researchers.

With SSHOC tools and services, research institutions will be able to easily deposit, repurpose and reuse research data.

SSHOC will facilitate universities and research institutions in the adoption of research data management and open & fair science principles while ensuring greater visibility of their research results.

SSHOC will contribute to increasing the interoperability of universities and research institutions' data and tools and ensure a greater verifiability and reproducibility of their research. This in the long run will result in more mature, more robust research methodology (which is still lacking in many Humanities and Social Sciences disciplines), and in increased trust in research results and research in general.

Surveys and direct contact, project partners' expertise, relations, channels and tools already in place, as well as project activities will be used to determine specific needs. Geographical and disciplinary characteristics and diversity will be considered. Later, the project will use webinars, trainings, publications and interviews to ensure the exchange of knowledge and good practices. The project will also explore the possibility of holding awareness days at universities and research institutions, to engage with this group.

3.4.3 Stakeholder-specific engagement activities

Various conferences and train-the-trainer bootcamps represent the main engagement channels for stakeholders within the group of universities and research performing institutions (e.g. The European Conference on the Social Sciences (ECSS, July 2019), Digital Humanities (DH) conference (July 2019), etc.). Such conferences are attended in many cases also by lecturers from many countries that can be multipliers, taking the information with them and integrating them in their teaching and/or institutional practices. The project will attempt to target such Conferences to co-locate its engagement events and/or be present with dissemination material. WP6 in collaboration with WP2 are leading the activity of keeping track of such events, for the project to be able to target appropriate audiences.

3.5 Policy-Making Organizations

3.5.1 Landscape

The European Commission describes EU policies and laws in the decision making process as "carefully designed to bring benefits to citizens, businesses and other stakeholders in the EU".[25] EU policies influence and set grounds for national policies, which might need to change or be updated (such as what happened after GDPR was enforced in May 2018).

Many EU and national policies influence the work of researchers. With regards to the policy vision of the EOSC, SSHOC will play a key role in the SSH context by helping to harmonize domain-specific data policies, to manage Intellectual Property Rights (IPRs) and ethical issues, and to address legislative or interoperability issues, which affect data handling across geographical and discipline borders. Ethical issues related to open access and the implementation of the FAIR principles will be addressed in T8.3 (Legal and Ethical Issues) for the need of international comparison.

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[25] https://ec.europa.eu/info/strategy/decision-making-process_en

3.5.2 Key messages, engagement channels and instruments

KEY MESSAGES

> SSHOC can provide a solid link to the needs of the SSH community. This will in turn assist you in ensuring that your policies achieve the desired goals in the most efficient way.

> The European Commission has prioritised the building of the EOSC as a major contribution to Open Science in Europe, and SSHOC is contributing to these efforts by the realisation of the SSH Open Cloud. By joining SSHOC events and discussions, you can make a meaningful contribution to developments in this area.

> SHHOC can help harmonize efforts regarding domain specific data policies and management of IPRs and ethical issues at local, national, regional and European level.

ENGAGEMENT CHANNELS AND INSTRUMENTS

The project will actively involve and support national decision-makers and policy makers. It will also make sure to raise awareness on how they can profit from the SSH Open Cloud at national level. Due to the specificity of national policy making organizations, WP6 suggests the use of national engagement channels to raise awareness about the work of the whole project and engage with policy makers. WP6 will reach out to policy making organisations to gather feedback about their needs and expectations from the SSH Open Cloud, the SSH research community and research infrastructures in general, as well as to identify which SSHOC outputs could be used for future policy development.

The project will also target policy making organizations via engagement in the RDA Data policy standardisation and implementation IG.[26]

3.5.3 Stakeholder-specific engagement activities

A series of geographically distributed **workshops** will be carried out by WP6 addressing different target audiences (including policy makers) and disciplinary perspectives. The aim of these workshops is to

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[26] https://rd-alliance.org/groups/data-policy-standardisation-and-implementation-ig

gather feedback from various stakeholders at a local level and inform project work based on the feedback and input received.

Furthermore, **consultation actions** will be set up involving, among others, national decision-makers and policy makers to foster stakeholder involvement in preparatory investigations and requirements analysis that will be the starting point for establishing an appropriate governance model for the SSH part of the EOSC. Through consultations with policy makers, the project also aims to ensure the equal participation of different domains (Humanities, Social Sciences, Heritage Science) in the SSHOC. This activity will be carried out by *WP8 Governance / Sustainability / Quality Assurance.* Further engagement with this stakeholder group at Governance level will be achieved through interaction with the EOSCsecretariat.

Policy-making organizations will be invited to two specific **cross-stakeholder events**, the mid-project Stakeholder Forum and the SSHOC Final Conference, where the project will showcase its progress and achievements and engage with a broader range of SSHOC stakeholders and other European initiatives.

3.6 Research Funding Organizations

3.6.1 Landscape

Research Funding Organizations are essential enablers of OS, especially through their mandates for grantees, and consequently, they play a key role in building the Open Cloud for Social Sciences and Humanities. Many research funding programmes and organizations at European and national levels offer funding opportunities for individuals and institutions to carry out research activities across the Social Sciences and Humanities disciplines and are working towards Open Access to FAIR data.

The European research funding landscape is characterized by complexity. The European Union with its specific research funding bodies and programmes is one of the key research funders in Europe, however, many national agencies are responsible for research and innovation at the country level. The mandate and policies of these national bodies can differ from country to country, but they are all key actors in making OS a reality.

As Research Funding Organizations are key drivers and enablers of achieving universal access to data and creating the EOSC, they must be aware of the creation, activities and value of the SSH Open Cloud. Furthermore, national research funding agencies play a crucial role in how OS is perceived at national level. Therefore, they must be involved and engaged throughout the project. They should provide input on the development of the SSHOC and align future funding activities with it.

3.6.2 Key messages, engagement channels and instruments

KEY MESSAGES

> Collaborating with SSHOC is an opportunity to strengthen ties with your European and national counterparts, and with other SSHOC stakeholders.

> Being aware of the SSH Open Cloud will help you align policies, mandates and funding mechanisms with new developments, in order to improve the impact of your funds and activities.

> SSHOC can help you to access national and international data that can be made comparable at European level and to harmonize efforts regarding domain specific data policies and management of IPRs and ethical issues.

> By making use of existing survey questions, multilingual question banks, common vocabularies, and proven sampling methods, the project will ensure that newly generated survey data are cheaper to produce, that they are embedded more easily into the existing data infrastructures and have increased use.

ENGAGEMENT CHANNELS AND INSTRUMENTS

Several channels have been identified to foster research funding organizations' awareness of, and engagement with, the project. Through workshops and strategic in-person meetings, for example, research funding bodies will have an opportunity to connect with the project as well as project beneficiaries and other stakeholders and adjust their funding policies according to the changing needs to achieve better impact of their funds. Other effective channels to engage with research funding organisations are conferences and third-party events, the SSHOC website, social media, factsheets, publications and newsletters.

3.6.3 Stakeholder-specific engagement activities

Research funding bodies will be invited to attend the **SSHOC Stakeholder Forum** in 2020. This SSHOC event will provide an opportunity for research funding bodies to connect with other SSHOC stakeholders and engage in dialogue as well as contribute to the shaping of the SSHOC. The project is intending to be present at several **third-party events and conferences**, which will provide opportunities to engage research funding bodies in discussions about the project. For instance, the14th RDA Plenary meeting in Finland, where the project will organize a side-event will be such an opportunity.

The project will also leverage on project partners' (such as SHARE-ERIC, CLARIN, DARIAH or CESSDA - just to name a few) existing communication networks at national and European level in reaching out to research funding bodies.

3.7 Private Sector and Industry Players

3.7.1 Landscape

By engaging with the private sector and industry, SSHOC can ensure a higher profile for greater usage of its assets, thus supporting industrial development. This in turn will contribute to the sustainability of the project. SSHOC is of interest to this stakeholder group with business opportunities to exploit the marketplace services and the on-boarding of domain specific skilled professionals on data stewardships. The private sector and industry players can be divided into two categories:

1. **Service Providers:** commercial service providers interested in promoting their services through the SSHOC marketplace. For this stakeholder group SSHOC also provides them with a means of interacting with researchers to improve their services

2. **Service Consumers**: organisations with whom tools and services for cross-national research could be shared.

Examples of private sector and industry players identified by the stakeholders mapping exercise of the project are:

TABLE 3: EXAMPLES OF PRIVATE SECTOR AND INDUSTRY PLAYERS

Service providers	Service consumers
- FigShare - Libnova - Academiclabs - Emerald Publishing	- Ipsos Mori - Kantar Public - GfK

● ExLibris ● Digital Science ● GEANT cloud catalog ● HNSciCloud ● EuroCloud community ● DG Connect E2 Software & Services cloud computing projects extract from CloudWATCH observatory assess the private sector partners	● Gallup

3.7.2 Key messages, engagement channels and instruments

KEY MESSAGES

> *For Service Providers:* SSHOC offers an opportunity to promote your services via the SSH Open Marketplace and a means of interacting with researchers to improve your services.

> *For Service Consumers:* SSHOC offers a way to access publicly funded open access datasets, services to help exploit open access data sets and a means of interacting with the groups producing the datasets and services.

ENGAGEMENT CHANNELS AND INSTRUMENTS

SSHOC will establish synergies with EOSC implementation projects[27] to address this stakeholder group and leverage existing connections:

- SSHOC and EOSC hub are establishing a task force on collaboration. Stakeholder engagement with the private sector should become a standing agenda item.

- The ongoing OCRE project[28] provides a channel for engaging the private sector suppliers via its procurement activity. A series of events have already taken place since March 2019 and more are being planned.

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[27] https://www.eosc-portal.eu/about/eosc-projects

[28] https://www.ocre-project.eu/

- The ARCHIVER Pre-Commercial Procurement[29] which is addressing the question of long-term data preservation and its Open Market Consultation activity and events offer an opportunity to engage with the private sector suppliers active in this domain.

Beyond the H2020 projects, the private sector will also be engaged by drawing on existing networks of companies, public-private partnerships, trade association and EC funded projects:

- Big Data Value Association[30] is an Industry-driven and fully self-financed an international non–for-profit organisation. BDVA has almost 200 members all over Europe with a well-balanced composition of large and small and medium-sized industries (over 30% of SMEs), as well as research and user organizations. BDVA has published a relevant paper (April 2019) TOWARDS A EUROPEAN DATA SHARING SPACE Enabling data exchange and unlocking AI potential[31] in which the EOSC is mentioned as a 'Prominent Data Sharing Ecosystems for Science'.

- The European Regions Research and Innovation network (ERRIN), whose Members are mainly regional authorities, universities, research organisations, chambers of commerce and clusters, has a working group on Opening Science[32] and ICT[33] which could be used as an entry point in order to engage with ERRIN

- Specifically, for SMEs, the Enterprise Europe Network (EEN)[34] helps businesses innovate and grow on an international scale. It is the world's largest support network for SMEs with international ambitions. EOSCsecretariat could participate in events organised by the national members of EEN in order to engage SMEs at a local level.

- Digital Innovation Hubs and Competence Centres: Digital Innovation Hubs are one-stop-shops that help companies to become more competitive regarding their business/production processes, products or services using digital technologies. They are based upon technology infrastructure (competence centre) and provide access to the latest knowledge, expertise and technology to support their customers with piloting, testing and experimenting with digital innovations. DIHs also provide business and financing support to implement these innovations, if needed across the value chain. As proximity is considered crucial, they act as a first regional point of contact, a doorway, and strengthen the innovation ecosystem. A DIH is a regional multi-partner cooperation (including organizations like RTOs, universities, industry associations, chambers of commerce, incubator/accelerators, regional development agencies and even governments) and can also have strong linkages with service providers outside of their region supporting companies with access to their services. "(European Commission)

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29 https://www.archiver-project.eu
30 http://www.bdva.eu/
31 http://www.bdva.eu/sites/default/files/BDVA%20DataSharingSpace%20PositionPaper_April2019_V1.pdf
32 https://www.errin.eu/working-groups/opening-science
33 https://www.errin.eu/working-groups/ict
34 https://een.ec.europa.eu/

- Digital SME Alliance[35] the European network of SMEs - The European DIGITAL SME Alliance is the largest network of the ICT small and medium sized enterprises in Europe, representing about 20.000 digital SMEs across the EU. The alliance is the joint effort of 28 national and regional SME associations from EU member states and neighbouring countries to put digital SME at the centre of the EU agenda.

- Data-Pitch DIH[36] (ends Dec'2019): will create a transnational, Europe-wide data innovation ecosystem that will bring together data owners and Big Data technology providers, with start-ups and SMEs with fresh ideas for data-driven products and services.[37]

- CS3 community[38] - community of providers, developers and users of innovative storage and sync & share systems. The CS3 services are integrated with user environments and higher-level application services. CS3 reports on the progress in data science at all levels: local laboratories, regional collaborations and global science. CS3 applications range from innovative big-data analysis to science outreach and education.

In addition, the SSHOC website, virtual events such as webinars and physical events such as workshops have been identified as useful channels for engaging with the private sector.

3.7.3 Stakeholder-specific engagement activities

Many engagement activities are planned in the project's timeframe with conferences, workshops and webinars being among the most common.[39] In addition SSHOC should ensure presence at:

- EOSC related events – EOSC hub weeks

- Industry focused event such as ICT 2019

- European BDV Forum flagship events - Yearly in October

- CS3 conferences - Yearly in January

3.8 Civil Society and Citizen Scientists

3.8.1 Landscape

Citizen Science refers to "the general public engagement in scientific research activities when citizens actively contribute to science either with their intellectual effort or surrounding knowledge or with their

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[35] www.digitalsme.eu
[36] https://datapitch.eu/
[37] www.datapitch.eu/wp-content/uploads/2017/06/PUBLIC_DataPitch_D1.1_DataPitch-Factsheet.pdf
[38] www.cs3community.org
[39] https://docs.google.com/spreadsheets/d/1uaJjpkfuE74y3NbSjXWw6N8XQZLky_X_TzlTaxmiu6g/edit#gid=362747526

tools and resources" (Serrano at al., 2014).[40] When talking about citizen scientists, we usually refer to a broad network of people from different disciplines that has at least some experience in the field (e.g. some data skills in mathematics and social science), and who help scientists in fields like development and deployment of technologies and education materials with the goal of unburdening the data scientists.

Key principles of citizen science defined by European Citizen Science Association (2015)[41] are:

- Citizen science projects actively involve citizens in scientific endeavour that generates new knowledge or understanding;

- Citizen science projects have a genuine science outcome;

- Both the professional scientists and citizen scientists benefit from taking part;

- Citizen scientists may, if they wish, participate in multiple stages of the scientific process;

- Citizen scientists receive feedback from the project;

- Citizen science is considered a research approach like any other, with limitations and biases that should be considered and controlled for;

- Citizen science project data and meta-data are made publicly available and where possible, the results are published in an open access format;

- Citizen scientists are acknowledged in project results and publications;

- Citizen science programmes are evaluated for their scientific output, data quality, participant experience and wider societal or policy impact;

- The leaders of citizen science projects take into consideration legal and ethical issues surrounding copyright, intellectual property, data sharing agreements, confidentiality, attribution and the environmental impact of any activities.

Citizen science is a field in development. Some relevant resources can be found listed in the Foster portal,[42] while LIBER recently launched a relevant working group.[43]

As Citizen Scientists are active in various fields and disciplines, they form a significant part of the user community of the future SSHOC as data producers and data (re)users. Therefore, engaging with this stakeholder group and acquiring feedback and input from them will contribute to a better-informed project work and to the success of the SSHOC.

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[40] Serrano, F., Sanz, Francisco, Schaefer, Teresa, Silva, Cândida, & Kieslinger, Barbara. (2014). *White Paper on Citizen Science*. Retrieved from http://www.socientize.eu/sites/default/files/white-paper_0.pdf
[41] https://ecsa.citizen-science.net/sites/default/files/ecsa_ten_principles_of_citizen_science.pdf
[42] https://www.fosteropenscience.eu/taxonomy/term/241
[43] https://libereurope.eu/blog/2019/03/28/explore-citizen-science-join-libers-newest-working-group/

Civil Society Organizations defined by project CONSIDER[44] are non-governmental, generally not-for-profit organizations, not representing commercial interests, and pursuing a common purpose for the public interest.[45]

For citizen scientists to be able to function, data need to follow FAIR principles and be available as open as possible, which are among the key principles of SSHOC project. Furthermore, the project will deal with interdisciplinary use of data, when involvement from this stakeholder group is expected in the usage of data. T9.2 is working on Ethnic and Migration Studies, T9.3 dealing with Electoral Studies where they will analyse national and international data on citizens' electoral behaviour and T9.4 dealing with Heritage Science and Humanities (with some past work on this topic done by Jennings, Dobreva-McPherson and Devreni-Koutsouki, 2015[46]) and *T4.6 Semantic annotation on Heritage Science Data*. On the other hand, WP4 is dealing with innovation in the data production where they will work on methods and tools to ease citizens burden, such as the use of web interviews instead of face-to-face (in European Social Survey and related surveys), automatic speech recognition and speaker attribution and a like.

In the EU context, the emphasis is on the ability of citizens "to do science" by involvement in both responsible research and innovation and open science.[47]

3.8.2 Key messages, engagement channels and instruments

KEY MESSAGES

> SSHOC will provide an open source platform that is customised to the needs of the European SSH community and can support your scientific and research activities.

ENGAGEMENT CHANNELS AND INSTRUMENTS

Main communication will go through the SSHOC website, social media (as defined in D2.1) and project partners' established channels. The project would however like to present SSHOC outputs (like the SSHOC Marketplace, where users will be able to find and evaluate all SSH tools and service solutions) at relevant Citizen Science events such as the ECSA2020[48] and engage with citizen scientists to receive feedback on their needs and user experience.

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[44] http://www.consider-project.eu/
[45] http://www.consider-project.eu/home
[46] Jennings, Edel, Dobreva-McPherson, Milena, & Devreni-Koutsouki, Anna. (2015). (PDF) Citizen Science and Digital Cultural Heritage: Potential for Wider Engagement with the General Public. http://dx.doi.org/10.13140/RG.2.1.2845.3843
[47] Citizen Science projects in the framework programmes FP7 and Horizon 2020 can be found in Policy Brief (2017) http://www.sisnetwork.eu/media/sisnet/Policy_brief_Citizen_Science_SiSnet.pdf
[48] https://www.ecsa-conference.eu/

3.8.3 Stakeholder-specific engagement activities

Bearing in mind the current situation in the EU, we can conclude that the data science skills of citizens in Europe should be improved. To do so, citizens need to be trained in data science and provided with ways of measuring[49] the effectiveness of this approach. The general public as well as citizen scientists will need to be engaged; to increase awareness of citizens' research and innovation activities and their potential for the society (create innovations, reduce unemployment, support policy making); and to boost the analytical skills of citizen data scientists by providing hands-on training, webinars and consultation services which explain how to discover, analyse and present data. The SSHOC project is planning several webinars and training activities. These will be promoted to citizen scientists, taking into consideration the insights from existing citizen science projects[50] so that EU related policies and research data sharing practices[51] are supported, as well as networking with similar projects[52]/platforms.[53]

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[49] Exemplar project https://mics.tools/.

[50] Shedding light on data management practices in Citizen Science, http://digitalearthlab.jrc.ec.europa.eu/activities/shedding-light-data-management-practices-citizen-science/57774; Data management in Citizen Science projects (Survey report), https://publications.europa.eu/en/publication-detail/-/publication/b6799013-1d83-11e6-ba9a-01aa75ed71a1/language-en

[51] Sowing the seed: Incentives and motivations for sharing research data, a researcher's perspective, http://repository.jisc.ac.uk/5662/1/KE_report-incentives-for-sharing-researchdata.pdf

[52] Developing a Citizen Science projects archive, http://digitalearthlab.jrc.ec.europa.eu/activities/developing-citizen-science-projects-archive/57710

[53] Citizen Science Platform– a tool to extend the evidence base for policy, http://digitalearthlab.jrc.ec.europa.eu/csp

4. Collaboration with other SSHOC Work Packages

4.1 Cross-stakeholder events (WP2)

In addition to targeted stakeholder engagement defined above, SSHOC aims to overcome silos and connect stakeholders through cross-stakeholder engagement activities. D2.1 defines how the SSHOC channels target all stakeholders identified. Partner and synergy networks should function as multipliers to reach the wider stakeholder networks.

SSHOC plans for two specific cross-stakeholder events:

- The mid-project Stakeholder Forum to showcase project progress and achievements and engage with a broader range of SSHOC stakeholders and other European initiatives (co-organized with WP2, M18)
- The SSHOC Final Conference (co-organized with WP2, M36)

4.2 Hosting and sharing data repositories (WP5)

WP5 is tasked to offer a service on the EOSC cloud platform, which will provide SSH institutions without a data repository system a data hosting and sharing facility to simply and effectively create an online repository for their designated communities. In parallel to an analysis of the preferred extra functionalities among the key stakeholders and the selection of these functionalities based on the broadest needs of the stakeholders, WP5's task 5.2 will collaborate with WP6 on organizing train-the-trainer workshops and research-oriented webinars on how to use this service.

4.3 Pilot studies (WP9)

WP9 is tasked to identify the challenges and obstacles that specific user communities experience when they use or contribute to the SSHOC. Engaging with the members of these communities is therefore crucial for gathering the right input and completing the pilot studies that will inform about the problems and obstacles regarding the usability of the SSHOC Marketplace and will also serve as best practice examples. Throughout the project, three pilot studies will be conducted of the following disciplines: Ethnic and Migration Studies, Electoral Studies, and Heritage Science and Humanities.

5. Monitoring and Evaluation

WP6 will monitor the following key performance indicators (KPIs) to measure and evaluate the progress and success of the community engagement activities during the 40 months of the project.

TABLE 4: KPIS FOR SSHOC ENGAGEMENT ACTIVITIES

Type of engagement activity	Specific engagement activity	KPIs	Leading SSHOC work package
Workshops	**Workshop** with partners that produce and process data in SSH to compare the services, methods, standards used by the different communities and identify a set of common metadata	**1** workshop (as per GA)	WP4, Task 4.7
	A series of **geographically distributed workshops** addressing different target audiences (e.g. data producers, data users, data experts, "non-savvy" researchers, librarians, secure data facility professionals, policy makers and civil society **(M6-M36)**	At least **6** workshops (1 from Humanities perspective, 1 from the Social Sciences perspective, and 4 cross-disciplinary Workshops will target approximately **20** people each # of attendees # of participants of specific stakeholder groups engaged	WP6, Task 6.2
Webinars	A series of **awareness webinars** to update on specific services and to showcase practical use	**6** awareness webinars # of attendees	WP6, Task 6.2

	cases within the SSHOC infrastructure **(M6-M36)**	# of participants of specific stakeholder groups engaged	
	Training webinars (targeting appropriate audiences such as data producers, data users and data experts) and focusing on the practice of working with data, and adopting and leveraging at best the SSHOC tools, services, and data in conducting research in the SS and H **(M6-M40)**	**6** training webinars # of attendees Ensure that the right stakeholders are targeted # of participants of specific stakeholder groups engaged	WP6, Task 6.5
	Researcher-oriented webinars on how to use the SSHOC data repository service	# of webinars	WP5, Task 5.2
SSHOC events	**Mid-project SSHOC Stakeholder Forum (M18)**	**1** stakeholder forum to engage with a broader range of SSHOC stakeholders and other European initiatives **100-200** attendees targeted # of attendees All stakeholder groups should be represented	WP6, Task 6.2
	SSHOC Final Conference (M36)	**1** final conference **100-200** attendees	WP6, Task 6.2 co-organized with WP2

		targeted	
		# of attendees	
		All stakeholder groups should be represented	
Third-party events		# of third-party events with SSHOC presence	
Trainings	**Training activities** (targeting appropriate audiences such as data producers, data users and data experts) and focusing on the practice of working with data, and adopting and leveraging at best the SSHOC tools, services, and data in conducting research in the SS and H **(M6-M40)**	**6** training workshops (themes addressed identified in GA) # of attendees Ensure that the right stakeholders are targeted # of participants of specific stakeholder groups engaged	WP6, Task 6.5
Train-the-trainer bootcamps	**Geographically distributed SSHOC train-the-trainer bootcamps** to ensure scalability, growth potential, broad geographical distribution and effective return on investment of project efforts regarding the building of the SSHOC Training Network **(M13-M24)**	**3** train-the trainer workshops # of attendees Ensure inclusive geographical distribution # of participants of specific stakeholder groups engaged	WP6, Task 6.4
Information materials	**Information sheets and materials** for relationship building and	**8** information sheets prepared	WP6, Task 6.2

	consolidation across the ERICs members, project partners, the relevant existing networks of researchers, and European research libraries, and for supporting local engagement **(M6-M40)**	# of information materials distributed List of events, where information materials were distributed	
Case study	**Case study** of how archaeological communities can be supported with the transition from their current data handling practices to connecting their data to the EOSC	**1** case study	WP5, Task 5.7
	Use cases and user requirements collected from potential users/stakeholders to identify and test required features for the Marketplace and to devise the data model and overall system architecture **(M1-M18)**	**22** interviews carried out # of user cases and user requirements collected All potential users and stakeholders should be represented	WP7, Task 7.1
	Pilot studies to identify the challenges and obstacles that specific user communities experience when they use or contribute to the SSHOC	**3** pilot studies be conducted of the following disciplines: Ethnic and Migration Studies, Electoral Studies, and Heritage Science and Humanities	WP9, Task 9.2 (Ethnic and Migration Studies), Task 9.3 (Electoral Studies) and Task 9.4 (Heritage Science and Humanities)
Consultation	**Consultation actions** involving national decision makers, service providers, policy makers, representatives of research communities and other professional	# of consultation actions # of attendees # of participants of	WP8, Task 8.1

	users to support the establishment of an appropriate governance model for the SSH part of the EOSC	specific stakeholder groups engaged	
	Setting up an **editorial board** to define a set of criteria, and an assessment process to ensure qualitative content and promote longevity and sustainability of the SSHOC Marketplace as well as to make sure that the Marketplace is going into the right direction	# of members # of members in the editorial board representing specific stakeholder groups	WP7, Task 7.4

Stock-taking and evaluation reports	**Stock-taking and evaluation reports** will focus on (a) the challenges that specific user communities experience when contributing to the SSHOC, (b) the availability of procedures, tools and services to address these challenges and (c) the extent that these procedures, tools and services are sufficiently applicable for specific user communities or require further tailoring	**1** report on challenges user communities face when attempting to contribute to the SSHOC (M4)
		
		  1 mid-term evaluation report (M20)
		
		  1 user community feedback and usage report (M32)
			WP9, Task 9.1

As community engagement is an integral part and basis of the success of many project-related activities such as general project communications activities (WP2) or building the SSHOC Marketplace (WP7), SSHOC's community engagement activities will indirectly contribute to the impact metrics of these activities as well and therefore is recommended to also monitor the following metrics under WP6's community engagement activities:

- Participation in third-party events

- Number of training materials, tools and services added to the SSHOC Marketplace

- Number of users of the SSHOC Marketplace

- KPIs of communications activities (SSHOC's Monitoring Dashboard:[54] e.g., number of people signed up for the SSHOC newsletter, website traffic, social media engagement. etc.) - see D2.1 - *SSHOC Communication and dissemination KPIs*[55]

The identified KPIs will be tracked regularly throughout the project life-cycle together with the monthly Flash Reports produced by WP2 on "visibility, engagement, and the dissemination potential of online activities".[56] In addition, WP2 will also produce a preliminary report (M24) and a final report on user engagement (M38) to evaluate the impact of community engagement activities of the project.

To ensure the broadest engagement of the project with the identified target communities, T6.2 will carry out individual interviews with task leaders to identify and monitor the progress of specific community engagement activities carried out and planned by each project task. These interviews will inform project progress reports and provide a general overview of the delivered and planned engagement activities. Furthermore, they will also help identify potential gaps and necessary adjustments to the community engagement strategy. WP6 has already started with the identification of the various task-related engagement activities and their target audiences. This will further be refined in the coming weeks.

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[54] SSHOC D2.1, p.35
[55] SSHOC D2.1, p.20
[56] SSHOC D2.1, p.19

6. Addressing Potential Risks

Potential risks which can hinder the success of the execution of the stakeholder engagement strategy are as follows:

PROJECT COMPLEXITY

SSHOC has a high number of consortium partners (20), collaborating organisations (28), WPs (10), tasks (44) and deliverables (101). This makes good coordination essential to the successful completion of the activities and appropriate stakeholder engagement. WP6 uses an overview of the various tasks, and targeted activities and audiences for each task, to minimize overlaps and ensure all relevant stakeholders are addressed and involved. This overview table will be updated periodically by the task leaders and interviews will be carried out by WP6 with task leaders to ensure the successful monitoring of the activities.

STAKEHOLDER COMPLEXITY

End-users are key to the success of the project and the SSHOC. They must be aware of the benefits of using the platform. However, the complexity of the landscape of SSH stakeholders can hinder the success of outreach and engagement activities. The SSH community landscape is highly fragmented due to two aspects. Firstly, researchers and other end-users are active in numerous SSH disciplines. Secondly, they are part of institutions with different internal structures and management policies. This makes it difficult to reach them properly and/or involve them in the process individually. To overcome this challenge, the project targets groups rather than individuals and has a comprehensive communications and outreach plan that will target the SSHOC stakeholder community widely through the identified channels such as the SSHOC website, newsletter, various SSHOC and third-party events as well as social media.

EOSC COMPLEXITY AND DEVELOPMENTS

While the EOSC is a complex concept and developments are continuous and simultaneous to the SSHOC project activities, this Community Engagement Strategy has been drawn carefully keeping a flexible timeline to provide some space for engagement activities to adapt periodically to EOSC development and EOSC relevant activities (p.eg. activities of the EOSCsecretariat and the other EOSC cluster projects and implementation projects)

GDPR

The possibilities of directly reaching out to individual stakeholders for engagement purposes are limited due to the new European General Data Protection Regulation (GDPR). For this reason, the project has put in place a "two-steps communications method". Through the Stakeholders Mapping Database WP6 aims

to identify and leverage on the direct connections between project partners and identified stakeholders and use the already established communications channels between them to reach out to our target groups indirectly. Furthermore, on the SSHOC website anyone can register to receive news and relevant information on the project. During the workshops and awareness raising activities, the organizers will also inform participants about the possibilities for contributing to the project and will ask stakeholders who show interest for explicit permission to communicate further with them.

7. Conclusion

The SSHOC Community Engagement Strategy describes why and how the project aims to engage with its stakeholder community. It explores the key stakeholder categories identified as target audiences of the project and, since SSHOC partners already represent a part of the SSHOC-relevant community it builds on existing networks, channels and tools, while also identifying potential gaps and risks to be addressed.

Building the Social Sciences and Humanities part of the EOSC is the core of the project. To do this, end users, like researchers, but also associations, intermediaries and other involved parties, as identified, need to be actively involved to ensure success, commitment and maximize impact. Each identified stakeholder group plays a crucial role in shaping and building the SSHOC. It is particularly important for the success of the project to engage with them and raise awareness about the added value of the SSHOC assets for day-to-day research work and Open Science in general.

The document outlines a strategy for engaging with the SSHOC stakeholders, identifies key messages for each stakeholder group as well as channels and instruments to reach out to them and engage with them, while being in line with the SSHOC Overall Communication and Outreach Plan. WP6 will monitor the progress of the planned engagement activities in close collaboration with all project WPs. There will be several iterations of the stakeholder mapping exercise and the engagement strategy is going to be updated regularly during the course of the project to ensure successful implementation and a wide stakeholder engagement.

This Community Engagement Strategy will be complemented by the training activities of a sound Building Expertise Strategy to be delivered in December 2019.