TRANSFORuM

Communication and Outreach Strategy

Deliverable 7.1

[April 15th 2013]

Deliverable	Work Package	Title	Lead beneficiary	Person months	Nature	Dissemination	Delivery Date	Scientific
7.1	7	Communication and Outreach Strategy	RC	1.00	R	PU	2	Yes

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Date	Author	Type	Circulation
2013-03-15	Ralf Brand	Initial draft	All TG leaders
2013-03-22	Ralf Brand	Incorporating comments from Henrik Gudmundsson, Florian Kressler, Rebecca Garcia, Laurent Guihery	RC internal
2013-04-04	Ralf Brand	Incorporating comments from Nicole Sillner (communication professional)	RC internal
2013-04-09	Ralf Brand	Incorporating results from Social Media committee	

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1 CONTEXT

1.1 Specifications in the Description of Work

1.1.1 Context

At the most basic level, the purpose of the TRANSFORuM project is to sensitise the largest possible number of stakeholders (individuals and organisations) to the four chosen goals[1] of the European Commission's White Paper "Transport 2050". The rationale for this objective is spelled out in the project's "Description of Work" (DoW) under Task 7.2:

> *"While the Transport White Paper in general is known among transport stakeholders, the awareness and interest for specific goals is often weak. The TRANSFORuM dissemination activities will therefore aim to 'translate' the four White Paper goals covered by the project into a tailored and attractive language for different stakeholder groups. This will be supported by illustrative examples from the four areas to facilitate a higher awareness and better understanding among stakeholders. The aim will be to show that the Transport White Paper's goals have a high potential to create win-win situations for society, the environment, the economy and the work of stakeholders from the transport sector."*

As Work Package 7 (WP) it is the duty of Rupprecht Consult (RC) to take the lead for the development of a communication and outreach strategy for this project. According to the DoW such a document has to "specify the project phases in relation to dissemination activities, the target groups which will be addressed by different tools and communication channels." The strategy has to spell out suitable approaches to communicate with "a wide range of actors that need to be involved for implementing the four selected White Paper goals".

Further specification of target groups for dissemination activities are currently running in parallel with activities led by VTI[2] as part of WP2, that is, the identification of key stakeholders, related on-going initiatives and multipliers at EU and national level. See the separate section about "target groups" for further details. RC will co-ordinate such activities and ensure that all consortium members stay in unsolicited touch with the stakeholders most closely related to their area of expertise.

These stakeholders will be regularly informed about the project's progress and invited to contribute their views to the discussion. Where appropriate they will also be invited to join workshops and meetings. The questions who should be contacted, when and by what means *exactly* are necessarily unanswered in the DoW. This document therefore articulates responses to these questions by, first of all, operationalising them into smaller and more manageable units and, in a second step, by articulating an integrated communication strategy, consisting of a set of dovetailed individual elements which are clearly recognisable as part of a wider project "brand".

Given the project's objectives and rationales it is of utmost importance for its communication strategy to be based on a two-way communication model. This means to both facilitate the input of possibly many stakeholders (even those who are unable to participate at face-to-face events) and to disseminate project results to them. In other words, we need cutting edge tools to *listen to* stakeholders <u>and</u> to *talk to* them. These two communication modes have to be essentially thought of as parallel and synergistic elements.

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[1] Related to the four thematic areas 1) urban transport, 2) freight, 3) high-speed rail and 4) ITS.

[2] STATENS VAG- OCH TRANSPORTFORSKNINGSINSTITUT, Sweden

1.1.2   Milestones and Deliverables of WP7 (all RC as lead beneficiary)

The DoW defines the following set of milestones and deliverables for WP7 which have to always be kept in mind:

No.	Title	Person months	Dissemi-nation	Month	Year
D7.1	Communication & outreach strategy	1.00	PU	Mar	2013
MS3	SharePoint for stakeholders operational			Mar	2013
D7.2	Promotional project leaflet, introductory brochure about the four thematic areas, and roll-ups	1.00	PU	Apr	2013
MS5	Project identity created			Apr	2013
MS6	TRANSFORUM website up and running and mailing list launched			Apr	2013
D7.3	1st Project newsletter & 4th Thematic Group newsletter to participating stakeholders	0.50	PU	Jul	2013
D7.4	2nd Project newsletter & 4th Thematic Group newsletter to participating stakeholders	0.50	PU	Jan	2014
D7.5	3rd Project newsletter & 4th Thematic Group newsletter to participating stakeholders	0.50	PU	Jul	2014
MS19	Joint Forum Meeting - final conference held			Dec	2014
D7.6	4th Project newsletter & 4th Thematic Group newsletter to participating stakeholders	0.50	PU	Jan	2015
D7.7	Roadmap & recommendations document accompanying the technical documents issued by WP6	1.50	PU	Jan	2015
D7.8	Strategic outlook document ('glossy version') accompanying the technical documents issued by WP6	1.50	PU	Jan	2015

1.1.3   Resources

A total of 25 person months is allocated to WP7, which are distributed among the consortium members as follows:

	Project Effort by Beneficiary and WP, Annex 1, p. 34
Rupprecht Consult	9.50
Statens Vag- och Transportforskningsinstitut	1.00
Uniwersytet Gdanski	1.00
Centre National de la Recherche Scientifique	**0.50**
Austriatech	2.50
Danmarks Tekniske Universitet	2.50
University of Oxford	1.00
Centrum Dopravniho Vyzkumu v.v.i	1.00
Kunglia Tekniska Hoegskolan	2.50
Karlsruher Institut für Technologie	1.00

Transportokonomisk Institutt	1.00
Institut d'études politiques de Paris	1.50

1.2 Project Phases

At the most basic level, TRANSFORuM follows a set of three main phases over its lifetime of 24 months:

1.2.1 Preparation and stakeholder recruitment

In this phase some general information about TRANSFORuM has to be produced and disseminated in order to draw general attention to the project and to inform key stakeholder-participants about the opportunity to co-shape the future of the European transport arena through TRANSFORuM as a channel through which ideas, concerns, statements of commitments can be communicated to other stakeholders and policy makers, including the European Commission.

The preparation phase has to seamlessly feed into the concrete recruitment process. It would be unacceptable if the information phase managed to generate interest among stakeholders but then got decelerated by an inconvenient process to express their interest, to register for events, to communicate their willingness to participate etc.

1.2.2 Interaction with stakeholders

The actual "hot" interaction phase with stakeholders begins – at the latest – with the *First Joint Forum Meeting* in Gdansk (June 24th – 25th 2013). Roughly 10 stakeholders per thematic group (40 in total) should arrive at this event relaxed (a specific stakeholder helpdesk at VTI is in charge of related issues such as travel logistics and accommodation), well briefed and prepared. A key communication task in preparation of this and one other following Joint Forum Meetings is therefore to provide sufficient, clear, succinct information well in advance. The individual participating stakeholders will be known by that time which will facilitate more direct and personal communication means and contents.

A professional moderation approach will be employed to ensure a productive, fair and balanced discussion during these events. This can be seen as part of the communication strategy but will be elaborated in a stand-alone document. The reporting and documentation of the discussions will have to follow a co-ordinated approach. A separate guidance document for all thematic group leaders will be prepared for this purpose. The minutes will follow a uniform template according to TRANSFORuM's visual identity. They will be made available to all participants.

A complementary input gathering approach will be the attempt to elicit stakeholders' views through online questionnaires and through personal, telephone and email interviews. It is difficult to formulate a universal communication technique for the latter purpose because, by definition, all contacts have to be highly personalised. We will obviously honour related preferences for certain communication channels, media and technologies as far as possible. The recruitment of participants in the online surveys, however, does need a well thought-through strategy, depending on the target group; see below.

1.2.3 Dissemination of results

The final results (*Roadmap*, *Recommendations* and *Strategic Outlook*) will be disseminated to the widest possible array of stakeholders; to those who attended TRANSFORuM events, to those who expressed an interest in the project per se and to those with whom TRANSFORuM won't have been

in touch by then but who we consider crucial players. For the former a direct and personal communication style will be employed, also to express TRANSFORuM's appreciation for their participation.

Many other actors, mostly organisations, whose personal contact details we do not have, can only be contacted in "mass" style. However, we will endeavour to build up a network of anonymous "followers" beforehand in order to get some factual information about the availability of the final results under these players' attention radar. The term "follower" in this context can be interpreted in the *Twitter* sense but should also include other communication channels. We will seek further advice from communication experts on how to maximise these potentials and include such services in the tendering process for graphic designers / communication advisors.

1.3 Target Groups

At any point over the lifetime of the project, due consideration has to be given to the professional roles and ethos, management conventions, time constraints, typical communication styles and routines, technological preferences, and other contextual factors within which these stakeholders operate.

TRANSFORuM's target groups vary to some degree depending on the project phase (and obviously the different thematic areas); as defined in section 1.2. The best suited communication approaches and tools vary accordingly.

1.3.1 Preparation and stakeholder recruitment

In the early stages a possibly wide array of stakeholders should receive the information that the project as such exists and that it allows certain opportunities to shape the future reality of European transport. The DoW distinguishes the following three target groups:

- collective stakeholders (e.g. European and national networks);
- individual stakeholders (e.g. implementers, practitioners, experts and researchers)
- dissemination contacts (e.g. professional magazines).

Across these generic types, the following thematic communities shall be addressed: research, technology, planning and scheduling, operations, energy, infrastructure, authorities at local, national and EU level, etc. Also representatives of on-going related activities[3] and other existing organisations[4] will have to be informed. This includes explicitly ERRAC, ERTRAC, WATERBORNE and POLIS.

Care has to be taken to avoid selection bias in favour of existing, incumbent big players. Quite plausibly, the future of a competitive and resource-efficient transport system will also be based on new, yet to be developed products and services. We therefore strive to also involve small, emerging players who might not yet have established associations representing their interest. This is part of a currently on-going effort as part of WP2, to identify a possibly representative, unbiased database of relevant stakeholders. The selection rationale will soon be articulated as D2.1 "Shaping the TRANSFORuM network (Working paper)".

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[3] e.g. Technology Platforms, 'European Green Cars Initiative' and 'eSafety Forum'

[4] e.g. FIA, UITP, EUROCITIES, European Intermodal Association

1.3.2   Interaction with stakeholders

During the actual interaction phases, several main target groups can be distinguished:

- Attendees at face-to-face meetings, i.e. *Joint Forum Meetings* and *Thematic Workshops.* By definition, the communication with these individuals will already be highly personalised.
- Participants in online surveys. While some of them will be known individuals, we also hope to recruit a good number of previously unknown respondents. This, however, requires a clever linkage from the general communication strategy to the survey recruitment strategy.
- Interviewees. A selected sample of known individuals will be approached personally to clarify and to follow-up upon certain issues, mainly those that emerged during project events. We will mainly rely on existing personal contacts for this purpose.

The communication with the above three groups has to be *two-way* because TRANSFORuM does not only want to *reach* them but also to *listen* to them; this is TRANSFORuM's very raison d'être. The term "target" group is therefore somewhat misleading. This is different for the following groups, because TRANSFORuM will mainly need to communicate *to* them.

- Network of interested stakeholders. These are relevant stakeholders who might already have expressed an interest in TRANSFORuM but, for whichever reason, were thus far unable to actively participate in its activities.
- Wider community of stakeholders. This includes stakeholders who either might have heard about TRANSFORuM but chose not to get in touch with us or those who might not even know about TRANSFORuM's existence. In practical terms, both groups have to be treated equally because we will not have a way of distinguishing between them in our communication strategy.

1.3.3   Dissemination of results

A similar binary distinction of TRANSFORuM's target groups can be made for the dissemination of results. The first group will consist of known individuals and organisations because we will have been in direct contact with them. A much more personalised approach can be used for this group and we expect to be able to draw their attention to the project findings through personal and mass emails, social media, possibly an RSS feed on our website in some cases personal phone calls and even visits.

In terms of how we can reach the second group (the not-individually-known stakeholders), there might actually be an overlap with the individually known stakeholders in certain communication channels such as social media – because we will not know who exactly is "following" TRANSFORuM or who regularly checks the project's website. What we can do, is analyse the website visitor statistics and possibly draw conclusions for further specifying our communication strategy.

In all project phases each consortium partner will make use of its existing networks to disseminate information about the project and its results. The networks might be discipline-specific, theme specific or geographically-specific. In the latter sense all project partners are considered as 'National White Paper Agents'. In this role all partners are expected to feed information into their national networks. This will include smaller translation tasks into national languages.

We anticipate to reach certain stakeholders through presentations at various events. This obviously includes TRANSFORuM's own final conference in Brussels in December 2014 but also events organised by third parties where project representatives can make an appearance. We will "cold-call" certain organisations with such an offer but expect to find such opportunities mainly through personal contacts; either pre-existing or developed over the course of the project.

2 OBJECTIVES

In light of the above – and with reference to the DoW – the objectives of TRANSFORuM's communication strategy are[5]:

- Informing all relevant stakeholders[6] (directly and through third parties, e.g. media and other multipliers) about the four chosen White Paper goals;

- Informing all relevant stakeholders about the opportunity to provide input to the further policy formation through participation in TRANSFORuM activities;

- Keeping all stakeholders informed about the process of TRANSFORuM's activities and events and wider issues that are related to the four chosen White Paper goals;

- Providing a "friendly face" of TRANSFORuM in the sense of a low-hurdle atmosphere (both psychological and technical) to get in touch with the project team;

- All communication tactis have to be ethically and legally on 100% sound turf. TRANSFORuM wants to communicate professionally, refreshingly, conveniently but also tactfully.

- TRANSFORuM's communication tools have to be efficient, making the best possible use of financial resources and staff time.

- Their combination also has to be effective. A degree of very staff-intensive "direct marketing" is thus acceptable as long as this plays a strategic role in a wider communication logic.

Ideally, TRANSFORuM's communication should not only rely on cognition-heavy content and form. The rationale for this consideration is fuelled by the acknowledgement that what TRANSFORuM considers the "best" argument does not automatically win most adherents[7]. Therefore, TRANSFORuM will endeavour to engage not only people's intellect but also – at least in order to gain initial attention – their affective dimension.

One such strategy is our attempt to seek endorsement by one or more widely recognised individuals whose name and face can "open mental doors". For example, we are currently trying to organise a letter of support from Matthias Ruette, Director General of the European Commission's Mobility and Transport . We will also use the name of some signatories of letters of support for the initial project proposal in similar ways. It would also be good to incorporate a degree of "refreshment", deliberate cognitive dissonance, surprise, playfulness etc. in TRANSFORuM's communication strategy. However, such approaches must not, under any circumstances, compromise the appearance of professionalism and ethical conduct of the project and the seriousness of the content it deals with.

3 COMMUNICATION CHANNELS

The following communication channels are structured according to the "carrier medium": Personal interaction, Electronic and Hardcopy. There is some inevitable degree of overlap between them.

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[5] Please note: The order of these objectives does not imply a hierarchical relationship between them.

[6] The expression "all relevant stakeholders" refers to related professional communities but also to "recipients" of policy measures and users of infrastructures, technologies and services;

[7] As has been demonstrated in the sociology of science and by scholars in the field of (STS) Science and Technology Studies, knowledge, arguments and consensus is always – and has to be – socially constructed.

3.1 Personal interaction

3.1.1 Direct marketing

TRANSFORuM is about involving the right stakeholders that have a real say in what feasible ways of implementing the Transport White Paper's goals could be. These stakeholders need more than standardised information. Important stakeholders want to see that the project will take into consideration their information needs and is serious about their input to discussion. Therefore, the thematic leaders will approach important organisations or individuals (e.g. EU level actors) directly via e-mail, phone, letters and even face-to-face meetings.

This is to involve them in discussions about pertinent matters and to better understand key stakeholders' needs and interest at a very detailed level in the sense of an in-depth qualitative methodology. For this purpose, thematic group leaders will compile short tailored information packages as discussion prompts and then try to elicit their views on how to reach the White Paper's goals.

In addition, RC will have a role as 'project reporter'. Interesting stakeholders – esp. "hard-o-reach" ones – that need special attention will be asked for dedicated meetings to be informed about the project and to provide their view on specific questions (approx. 5 meetings per year). That way, "key stakeholders that are not willing or able to join meetings/ workshops, but are needed to obtain crucial input to roadmaps and recommendations" (DoW) can still be involved. Project partners that are closely located to stakeholders that should be approached may support RC in this task. Interesting and relevant meeting locations will ensure a high interest of stakeholders.

3.1.2 Presence at other events

Consortium members will participate in relevant conferences where opportunities arise to promote the project's activities (piggy-back activities). All consortium members will be asked to report such presentations to RC. In addition, RC will send out regular reminders to all consortium members to ensure that related opportunities appear on every partner's radar. RC will also regularly elicit nominations of suitable events among its members, partners[8] (EC, EESC etc.) and selected stakeholders. Such nominated events have already and will be lodged in the events section of the project's SharePoint. The most strategically important events will be identified in consultation with WP and TG leaders. Our communication strategy has to be prepared for such activities through the provision of a presentation "kit" including a standard PowerPoint presentation about TRANSFORuM as well as flyers, one generic and four theme-specific roll-up banners etc.

3.1.3 Face-to-face communication

The pivot of TRANSFORuM's "listening mode" is the series of personal interaction events, that is, the two Joint Forum Meetings (Gdansk, June 2013 and Vienna, January 2014) and the two sets of theme specific workshops (one per TG between Oct. 2013 and Jan. 2014 *and* one per TG between Apr. and July 2014) in thematically relevant locations yet to be defined. The Joint Forum Meetings will be attended by 40+ stakeholders (10 per TG) and we expect around 10 stakeholders to attend each of the thematic workshops. In total, TRANSFORuM will thus engage with over 200 stakeholders during these events.

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[8] Partners and, where appropriate, stakeholders will also be kindly requested to mention TRANSFORuM in other events which they attend.

These events will be carefully prepared in logistical terms but also in the sense of providing the best possible briefing input for the attending stakeholders and of ensuring that the actual meetings are professionally moderated. The communication strategy leading up to these events has to be highly specific to the relevant project phase. For example, the announcement of and invitation to the Vienna meeting will have to already include some results of the Gdansk meeting. Likewise, the array of invitees for the Vienna event will have to be based – at least in part – on the results of previous stakeholder interactions.

Whereas the two Joint Forum Meetings and eight thematic workshops will primarily – but not exclusively – be designed as opportunities for stakeholders to provide input ("listening mode"), the Final Conference in Brussels in December 2014 (in the DoW also referred to 3rd Joint Forum Meeting) will mainly be a dissemination event[9]. The conference is planned as focused activity (one morning session with attached networking lunch) bringing together EU policy stakeholders as well as representatives from all other stakeholder groups. In the afternoon, final Thematic Workshops will be a held. Carefully planned dissemination activities will support the announcement and documentation of this event, which will also be made available via web streaming.

3.2 Electronic

3.2.1 TRANSFORuM Website

The TRANSFORuM website will be the core of the project's communication strategy and its main source of information. RC will be in charge of developing the concept for the website, for managing it and for its regular update. It should therefore be easy to update by RC staff without in-depth technical knowledge. RC requires Typo3 as content-management system.

The website could possibly modelled after the OPTIC website . A sub-contracted web designer will provide support in setting it up. Its launch is scheduled for the end of April 2013. RC has already registered the domain name www.transforum-project.eu. The website will be hosted at the provider http://all-inkl.com where RC has an All-inkl Business package. Related technical details are available at http://all-inkl.com/webhosting/business/. Ideally, the website should be optimised for both mobile and desktop browsers; this option should be accounted for as optional cost in subcontractors' bids.

The website will also play a key role in ensuring a legacy of the project beyond its actual lifetime. For this purpose it will be maintained for at least two years after the end of the project. Thus TRANSFORuM will leave a range of useful information and tools for stakeholders to work with (e.g. overview of funding schemes and other context conditions, good practice, roadmaps and recommendations, strategic outlook) and can trigger further discussions between relevant actors on ways to implement the White Paper goals or to set-up joint activities. The website can also continue to serve as communication platform between stakeholders to identify and discuss future win-win opportunities.

The target audience and consultation base of TRANSFORuM is the European Union 27+. Therefore, all information will be provided in English and selected material in the main sections (Home page, Background information, Events section, …) will also be available in the following project languages: German, Swedish, Polish, French, Danish, Czech and Norwegian. According to the DoW project partners agreed to conduct smaller translation tasks into their national language.[10]

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[9] At least in its early stage; the 2nd half of the event will of course provide further opportunities to comment on TRANSFORuM's findings

[10] Should the need arise – signalled through frequent requests from other countries – and the budget allow, we will keep the option open to translate key sections of the website also into additional languages.

The website will be feature-rich but clear and simple to navigate. It will be a "one-stop-shop" for anyone (general public and stakeholders) who wants to know more about TRANSFORuM. It's main features will include:

- Background information
    - Information about the Transport White Paper in general
    - Information about the chosen four goals in particular
- News section
    - Information about the project, its events, thematic group activities, outputs.
    - Interesting external developments in the four thematic areas
- Events section
    - TRANSFORuM-organised events
    - Related 3rd party events
- TG related sections
    - TG1 Urban mobility
    - TG2 Freight
    - TG3 High-speed rail
    - TG4 ITS
- WP related sections
    - WP3 Overview on main policies, funding mechanisms, actors and trends
    - WP4 Challenges and barriers for implementation of White Paper goals
    - WP5 International good practice case studies - "Transformation is possible!"
    - WP6 Roadmaps, concrete recommendations and detailed strategic outlook
- Document repository (project library)
    - All project outputs (flyers, working documents, roadmap, etc.)
    - Preparation material for attendees of TRANSFORuM events
    - Material of external organisations, including TRANSFORuM stakeholders
- Registration facility
    - Self-declaration as relevant stakeholder (to be fed into TRANSFORuM database)
    - Nomination of relevant stakeholders (to be fed into TRANSFORuM database)
    - Subscription to TRANSFORuM newsletters (project-wide and theme-specific)
    - Optional: Registration for the final conference (potentially also for other events[11])
- References (ideally always based on mutual link exchange)
    - Links to interesting sources
    - Links to related organisations (possibly categorised by TG)
    - Links to stakeholders' websites (possibly categorised by TG)
- Multimedia
    - Facility to embed multimedia material such as interview recordings or external videos
    - Facility to stream the live recording of the final project conference from Brussels
- Interaction
    - The website should feature some interactive elements (but no specific consultation platform) based on a consortium meeting decision from October 2012[12]
    - Moderated discussion board
    - "Questions and suggestions to the EC" section. If the EC wishes, a section with the EC's answers can be provided as well.

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[11] Please note: RC is currently in discussion with the consortium partner VTI who is in charge of all stakeholder logistics. Previous discussions indicated the possibility to use VTI's events registration facility simply by providing a link from the TRANSFORuM website to the VTI facility. No final decision has been reached yet though. We would therefore be grateful if bids could specify as a separate cost item the implementation of a conference registration facility.

[12] Minutes of October 2012 meeting: "The Consortium agreed that a tailored information newsletter (e.g. also to be sent to specific stakeholder groups) and the use of existing online forums seems more promising and realistic than establishing the project's own web 2.0 tools, which would lack the critical mass of users throughout most of the project duration."

- o   Regular short surveys (one question) on a specific aspect of the stakeholder discussion in TRANSFORuM
- o   Building-in the *option* to feature more extensive surveys to quickly test conclusions from forum meetings
- FAQ (only optional)
- Seamless connectivity with Facebook, LinkedIn, Twitter, YouTube etc.
- Legal disclaimer
- Contact details
- Site Map
- Facility to record and display site visit statistics (for internal access only)

The DoW mentions as MS3 the establishment of a SharePoint for meeting attendants, an online tool for document sharing for all stakeholders attending the TRANSFORuM meetings. However, after carefully weighing the pros and cons of such a tool the attendees of a consortium internal meeting in October 2012 decided that a static document repository ("project library" above), which is conveniently integrated into the website serves the originally intended purpose of a SharePoint even better.

3.2.2   Email

Email, both to individual recipients and mass mailings will play an important role for our project. The choice of when emails will be sent to whom is highly context specific. General conventions are thus difficult to formulate. What is important to note is the necessity of a clearly distinguishable TRANSFORuM identity in all email correspondence, both sending and receiving. Therefore, the email addresses helpdesk@transforum-project.eu and info@transforum-project.eu have been established. They can both be used to receive and to send emails. We are also currently discussing the benefit of establishing specific email addresses for each thematic group.

3.2.3   Newsletter

The DoW specifies a series of four electronic project-wide newsletters to be issued by RC, based on input from various WP and TG leaders, in project months 6, 12, 18 and 24. They are to coincide with four electronic theme-specific newsletters at each occasion. Both types of newsletters will be in electronic format and their attractive layout will clearly signal the affiliation to the TRANSFORuM brand. The project newsletter and the newsletter on the Thematic Groups will be promoted and distributed as an integrated document. If required, participants of the Thematic Groups can be approached by a more targeted newsletter (based on overall project newsletter).

Together this set of newsletters forms the following schedule:

D7.3	1st Project newsletter & 4 Thematic Group newsletters	Jul	2013
D7.4	2nd Project newsletter & 4 Thematic Group newsletters	Jan	2014
D7.5	3rd Project newsletter & 4 Thematic Group newsletters	Jul	2014
D7.6	4th Project newsletter & 4 Thematic Group newsletters	Jan	2015

Two types of mailing lists will be formed by July 2013, both based on the general TRANSFORuM stakeholder database (WP2; set-up and maintained by VTI) whose logical structure will allow the identification of relevant newsletter recipients.

- The project wide newsletter will include information about the project's progress, but also on other interesting developments related to the White Paper. A fixed section will include a stakeholder interview with prominent stakeholders and opinion leaders on 'White Paper

challenges and possible solutions' to prominently place an input for discussion. All consortium partners will feed the newsletter into their respective discipline-specific and national networks. If needed, they will also translate each newsletter into their respective language.

- Thematic-group specific newsletter: Each of the thematic leaders will be in charge of compiling a six-monthly electronic newsletter that provides information on the activities of the Thematic Group and other interesting news from the field.

3.2.4   Social Media and other online communication

The use of social media will be subject of forthcoming discussions of TRANSFORuM's "social media committee". What follows are some general thoughts which have yet to be sorted and prioritised. In order to make such decisions in a possibly informed way subcontractors' are requested to include in their offer a separately costed "social media coaching".

- Twitter[13]. Tweets could be used to publish news of the project, inform about TRANSFORuM events and alert followers to the availability of project results. Tweets will contain links to the project websites where followers can find more information.

- Facebook

- A TRANSFORuM group in LinkedIn could act as an interactive online discussion platform allowing open and free discussion between the participants and active exchange of experiences. This should be complementary to (and not distract from) any discussion facility on the TRANSFORuM website.

- TRANSFORuM will create an article on the White Paper for WIKIPEDIA®, expecting that people who search online for information about the White Paper get drawn to this page and from there to the TRANSFORuM project website. Quite possibly the WIKIPEDIA® page should be provided in different languages.

- Key outputs could be made available in a format that can be used by e-readers (Kindle etc.). The distribution of such documents would happen through the project website and possibly also through platforms such as iTunes store, GooglePlay, BlackBerry App World, Windows Phone Marketplace, Amazon Appstore, OviStore.

3.2.5   Third party channels

A strategic decision was made at a consortium meeting in October 2012 that "the use of existing online forums seems more promising and realistic than establishing the project's own web 2.0 tools, which would lack the critical mass of users throughout most of the project duration." Internally, this strategy of using third party communication channels is also being referred to as "piggybacking". To signal the spirit of this strategy other expression such as "to inoculate" or "to inject" TRANSFORuM themes into existing communication threads, websites and fora have been used internally.

All TRANSFORuM members are advised to be constantly on the lookout for such opportunities and to report them to the most pertinent WP or TG leaders[14]. It is mainly the latters' responsibility to

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[13] Unfortunately, the obvious Twitter identities are already taken

[14] Always with a copy to RC

channel condensed high-quality information from the project into these online tools and seek feedback from existing online communities. Currently, the following existing platforms seem suitable:

- Existing mailing lists, e.g. of the LINK and OPTIC project

- The online discussion forum of ELTIS and other similar fora.

- Existing professional journals

- Existing newsletter of other projects and initiatives

- Communication outlets of professional organizations

- Special mention deserves the EC consultation platform http://ec.europa.eu/yourvoice/ in this context. We will try to announce the TRANSFORuM consultation through this channel.

TRANSFORuM will also issue press releases to European media about important project milestones. Consortium members with existing personal contacts to relevant media are encouraged to also feed information into these channels. The most suitable media and the ideal moments for press releases will be carefully considered and will be discussed not only with WP- and TG-leaders but also, and importantly, with our advisory board and other trusted external partners.

We anticipate that most of the contents for third party channels will be sent in English. Where particular other opportunities exist, however, we will certainly consider the use of other languages, especially if they are already represented among consortium members.

3.2.6   TRANSFORuM PowerPoint Presentation

A default, "ready-to-go" PowerPoint presentation will be produced in eight languages. The presentation will introduce the White Paper goals and the activities of the TRANSFORuM project. It will be updated according to project progress and freely available on the TRANSFORuM website. In technical terms, the presentation will be provided in different PPT file versions as well as in PDF to ensure compatibility with different computer platforms. (As mentioned further below TRANSFORuM will also provide an empty PPT template to be filled by consortium members with relevant content for other, more specific audiences).

3.2.7   Outputs

Please note: Although TRANSFORuM's main outputs (e.g. roadmap, recommendations, strategic outlook but also the results of WP 3, 4 and 5) are listed below in the section "hardcopy" they will nevertheless also be published as digital documents for use on the project website, as email attachments etc.

3.3   Hardcopy

3.3.1   Project folders

The project will develop attractive and illustrated material in preparation of stakeholder meetings, including a promotion leaflet / flyer / brochuere (these terms are used interchangeably in this document). This will not only serve to inform the potential attendants of the workshops, but also be made available via the website to a wider group of actors. In particular, two types of flyers will be

produced, one about the project as a whole, the other as a set of four thematically specific flyers. Content-wise, the former will inform about the four selected White Paper goals, highlight the need for cross-sectoral, multi-level and supply/demand-side co-operation and emphasise related win-win potentials. It will obviously also inform more generally about TRANSFORuM's aims, methodology and activities. The theme-specific flyers will include details about each specific White Paper goal, related challenges, opportunities and best practice examples. Both types of flyers will be translated into seven other languages by the TRANSFORuM partners themselves. These will all be available as digital document only.

Please note: Only the English version of the project-wide brochure will be produced on paper, 1000 copies[15]. The printed version will also include a QR code which allows users of smartphones to directly proceed to the TRANSFORuM website for further information. (The non-english versions of any type of folder will *not* be printed on paper – unless funds remain at a later stage of the project. Bidders do not have to include such costs in their offers.)

These flyers will be distributed through various channels. Some will be mailed to key stakeholders and organisations and one copy each will be posted with written invitations to key stakeholders to participate in TRANSFORuM events. These stakeholders themselves will be encouraged to distribute flyers within their own network. Likewise, all consortium members are advised to distribute flyers at any suitable opportunity. In this context, it is worth mentioning that all project partners are explicitly considered as "National White Paper Agents" who are expected to feed related information – including our flyers – into their national but also profession- and discipline-specific networks.

3.3.2   Roll-ups

One generic roll-up about the project per se and four roll-ups about each of the thematic areas will be made available for promotion at events. Care will be taken that the content on these banners will not be out-dated after the first results and stakeholder opinions come in. RC will safeguard the generic roll-up and send it out to any consortium member who can use it at any suitable event. The four different TG leaders will be in charge of storing and sending-out their theme-specific roll-ups. All roll-ups will also contain a QR code to guide the audience conveniently to more detailed information on the TRANSFORuM website.

3.3.3   Main outputs (Roadmap, recommendations and strategic outlook)

TRANSFORuM's main outputs are a *roadmap* document, concrete *recommendations* for policy makers and implementors and a *strategic outlook*. Further details about the nature and content of these documents are available in the DoW. The relevant aspects to highlight in this communication and outreach strategy are:

- The full roadmap and recommendations document (deliverable D7.7) and strategic outlook (deliverable D7.8) will accompany the technical documents issued by WP6.

- And English "glossy" version of these two different publications (*Roadmap and recommendations = 1; Strategic Outlook = 2*) will be produced on paper in an attractive layout and format according to the same graphic charter as all other TRANSFORuM products. Bids from subcontractors are expected to provide different costs for different print runs (for 250, 500, 750 and 1000 copies.)

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[15] In line with the ambition to complement "cognition-heavy" asepcts of TRANSFORuM's communication strategy with affective elements, ideas shall be explored to print the flyer in an unconventional, possibly foldable layout which could even resonate with the yet to be developed project logo.

- Visually identical electronic version will be made available on the project website (possibly also some partners' websites), for use as email attachments etc. The default format will be PDF; also ePub and related formats will be considered for use on e-readers.

- A summary version of all key outputs will be made available in the eight languages of our project partners (incl. English). Bidders are expected to include separate cost options for the production of paper versions of these summary documents in eight languages (1000 copies in English and 100, 250, 500 in seven other languages).

- We explicitly keep the option open to produce more tailored documents that extract key messages from the roadmap for specific target groups.

4 Relationship: Phases, Target Groups, Tools

The following table summarises and illustrates the relationship between the various project phases, target groups and communication tools.

	Preparation and stakeholder recruitment	Interaction with stakeholders	Dissemination of results
Unknown relevant stakeholders (we aim to minimise this group)	Website Social media Trade journals 3rd party websites Existing networks Existing mailing lists	Online survey Social media	Website Social media Final conference Trade journals 3rd party websites Existing networks Existing mailing lists
Stakeholders known to be relevant	Website Social media Flyers Trade journals 3rd party websites Existing networks Existing mailing lists	Online survey Social media	Website Emails Social media Final conference Mailing of results Trade journals 3rd party websites Existing networks Existing mailing lists
Stakeholders who have expressed an interest but have not participated in any way	n.a.	Online survey Social media Interviews	Website Emails Social media Final conference Mailing of results Trade journals 3rd party websites Existing networks Existing mailing lists
"Light" interaction stakeholders (e.g. anonymous survey resondents)	n.a.	Online survey Social media Interviews	Website Emails Social media Final conference Mailing of results Trade journals

			3rd party websites Existing networks Existing mailing lists
Personal interaction stakeholders (e.g. forum and workshop participants)	n.a.	Online survey Social media Interviews Events	Website Emails Social media Final conference Mailing of results Trade journals 3rd party websites Personal contacts Existing networks Existing mailing lists
Close personal contacts (pre-existing and newly developed)	Personal contacts	Online survey Social media Interviews Events 1to1 Meetings	Website Emails Social media Final conference Mailing of results Trade journals 3rd party websites Personal contacts Existing networks Existing mailing lists

5   DUTIES FOR EXTERNAL COMMUNICATION SERVICE PROVIDER

The following services and products need to be provided by a sub-contracted external communication service provider (graphic designer etc.).

> *Note for external providers of graphic and communication services: The following information is only a non-comprehensive extract of key features of the above detailed communication strategy. Bids are unlikely to be successful unless all details provided above have also been taken into account.*

5.1   Visual project identity

TRANSFORuM needs a clearly distinguishable and easy-to-recognise, friendly, professional and programmatic visual identity which has to relate to the existing design of promotional White Paper material to strengthen recognition value. This visual identity has to be translated into a meaningful project logo, potentially a project font and graphic charter which informs the appearance of all its visual communication in the sense of a common style template for digital and hardcopy outputs (e.g. website, roll-ups, articles, newsletter, leaflets, publications etc.) This will be the main ingredient of the project's corporate identity or "brand". In the DoW the approval of the project identity is anchored as Milestone5 with a target date by the end of April 2013.

5.2   Templates

In addition to a graphic charter (incl. logo) described above as overarching product, the following other outputs will be expected. Please note: The items listed under "template" will be filled by RC with content.

- Templates
  - Letterhead
  - Report
  - Event agenda
  - Working Paper
  - PowerPoint template

Please note: For the following items content will be provided at some later stage and we expect that the service of incorporating the actual content (provided by RC) into the template should be part of designers' offer. However, we do need to see a sample layout already in order to judge the visual cohesion of the whole product family.

Ideally, the website should be optimised for both mobile and desktop browsers; this option should be accounted for as optional cost in subcontractors' bids.

- Website with the following functionalities (to go live by April 30 2013)
  - Easy to update by RC staff through an intuitive system[16]
  - Selected pages can be easily toggled into different languages
  - List of sections (only indicative) with subheadings (see 3.2.1 for details)
  - Ability to incorporate webstreaming material
  - Facility to record and display site visit statistics

- Leaflets / brochures / folders
  - 1 generic, project-wide leaflet
  - 4 theme-specific leaflets
  - Specification for both types of flyers
    - Tryptich A3 folded or 2 page A4 (we also welcome other creative ideas)
    - 1000 copies[17]

- Template for four newsletters

- Roll-up banner

- Publications (design and future printing costs)
  - See details under 3.3.3.

5.3 Evaluation criteria

The subcontractor will be selected on competitive grounds on the basis of best value for money as long as the following criteria are met or exceeded:

- Essential criteria

  - Provision of all products and services asked for under "Duties for external communication service provider;

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[16] RC has already registered the domain name www.transforum-project.eu. The website will be hosted at the provider http://all-inkl.com where RC has an All-inkl Business package. Related technical details are available at http://all-inkl.com/webhosting/business/.

[17] Please note: Only the English version of the project-wide brochure will be produced on paper, 1000 copies. The seven non-english versions of any type of folder will not be printed on paper – unless funds remain at a later stage of the project. Bidders do not have to include such costs in their offers.

- o Understanding of and consideration for the spirit and purpose of the TRANSFORuM communication strategy;

- o Demonstrable past experience with similar tasks;

- o Utmost reliability;

- o Ability to commit staff and resources required to work to the schedule specified below;

- o All images used in publicly available material have to be copyright free or copyright cleared;[18]

- o Coaching in state-of-the-art communication techniques, incl. social media included;

- o Established legal entity with standard liability regulations, insurance etc.

- Desired criteria

  - o Logo can be meaningfully reproduced in grayscale, possibly even black/white;

  - o Existing environmental policy of the bidder;

  - o Face-to-face interaction physically possible;

  - o Plausible ideas for other communication tools including ideas for "take-home" material like cups, pens, flash-drives … only more creative, ideally with a programmatic link to TRANSFORuM's themes and something that won't gather dust in the recipients' offices.

5.4 Production schedule *(counted in working days after contract signature)*

- 1-3 days: Face-to-face meeting to discuss further details

- 5-8 days: First outline of certain alternatives to determine the remaining corridor of options

- 10-14 days: Supply of honed-in near-final drafts

- 15-20 days: Supply of graphic charter

- 20-26 days: Supply of all services and products (except the actual reproduction of hardcopies)

Please note, top priority are the project website and the generic project leaflet. Some other deliverables such as newsletter templates can be delayed a little bit.

5.5 Deadline for submission of offers

Deadline for the submission of offers is March 25 2013, 17.00 o'clock Central European Time.

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[18] Not for bidding subcontractors: RC has a small repository of copyright-free images. In order to err on the safe side financially, however, bidders are advised to assume that all illustrative material will have to be procured from external sources.