



FP7-ICT-2011-8

# MARKOS

The MARKET for Open Source

An Intelligent Virtual Open Source Marketplace



## WP7 - Dissemination

### D7.1.1 – Dissemination Plan

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**Author:** Ilaria Lener, T6 ECO

**Partners contributed:** ATOS, SF

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**Executive Summary:**

This report describes the strategy and the set of actions that will be implemented within the project life cycle in order to assure the full achievement of dissemination goals.

The definition of the dissemination plan starts from the idea that the MARKOS system will give a considerable contribution in supporting a variety of stakeholders, such as software architects, developers, integrators, project managers and legal analysts.

On this regard, the identification of MARKOS targets as mentioned in this report reflects the stakeholder roles identified during the requirement phase developed within the work package 1 (deliverable 1.1.1a), so far. It is worthy to mention that the stakeholder taxonomy could be expanded, in particular thanks to the inputs coming from the work package 8 (Exploitation). As consequence, the dissemination plan itself should be intended as part of an iterative process, whose targets will be redefined in the view of market analysis, feedbacks gained during the prototype's validation phase, and exploitation/sustainability development.

In this perspective, a section of the dissemination plan is dedicated to present how the dissemination interacts with both the exploitation and validation processes.

Beside this, the plan provides a targeted strategy for each of the identified stakeholders. A full elaboration of dissemination tools is also included.

Moreover, the overall dissemination plan is organized in 5 phases over the project lifetime, according to the main project milestones (1-initial outreach, 2-architecture & prototype preview, 3-stakeholder feedback, 4-final scientific achievements and sustainability focus, 5-final validation) whose objectives, assets and communication tools are described in depth.

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# DISSEMINATION PLAN

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**ABBREVIATIONS**

FP7	Seventh Framework Programme
IPR	Intellectual Property Rights
WP	Work Package
OSS	Open Source Software
FLOSS	Free/Libre Open Source Software
IoS	Internet of Services
FI	Future of Internet

## 1. INTRODUCTION AND BACKGROUND

### 1.1. The MARKOS Project

The MARKOS project aims to facilitate the software developer's discovery and analysis of open-source software suitable to their technical and legal needs.

To this end, MARKOS will create a prototype of an interactive application and Linked Data API providing an integrated view and semantic query features on the Open Source Software (OSS) projects available on the web, focusing on functional, structural and licensing aspects of software codes.

The innovative aspect of the MARKOS project will be to offer semantic search and browsing to navigate the structure of the software code at a high level of abstraction, in order to facilitate the understanding of the software from a technical point of view.

Moreover the MARKOS system will focus on the software integration aspects, showing and exploiting, in particular, the relationships between software components released by different projects, giving an integrated view of the available Open Source software at a global scale.

The MARKOS system itself will be OSS, which, thanks to the offered functionalities, is expected to facilitate software development based on the Open Source paradigm in a global context.

Request for global knowledge of available, reusable source codes in Open Source Software (OSS) projects highlights the need to free the software analysts and developers from the technological barriers caused by the heterogeneity of approaches adopted by each OSS project to provide similar information on the software characteristics. However, technological heterogeneity is not the only obstacle. Strong legal competencies are required for evaluating how to combine software components adopting different licences.

At a glance, the MARKOS project is expected to give a considerable contribution in terms of:

- Enabling software developers to use an intuitive and advanced searching platform with an advanced service front-end allowing the easy identification of the more suitable Open Source solutions needed;
- Providing the analysis of code dependencies, software structures and potential license infringements at a global level instead of single projects;
- Facilitating the publication of the description of Open Source software as linked data and the production of new tools for software analysis and development leveraging this semantic data;
- Allowing a faster adoption and integration of Open Source components and libraries, while reducing license incompatibility risks;
- Strengthening the European community of developers of Open Source software, reducing time to market and establishing a validated path to integrate Open Source components among them and without the risks linked to complex and incompatible licensing schemata.

### 1.2. Dissemination Plan, Aims and Objectives

MARKOS dedicates a specific workpackage to the dissemination activities in WP7. Its general objective is to spread the project concepts, developments and findings to all stakeholders. This outreach and connection with stakeholders also provides a feedback mechanism to help influence further MARKOS development.

The Deliverable 7.1.1 – Dissemination Plan is one of the first outputs included within the WP7 at the dependencies of the *Task 7.1 “Awareness and on line Dissemination Strategy and Plan”*.

This Deliverable 7.1.1 “MARKOS Dissemination Plan” is aimed to define the overall project’s dissemination plan, including a more punctual identification of the stakeholders to be addressed, outlining more in detail the dissemination activities proposed in the first months of the project and expected to be evolved continuously throughout the project life cycle.

In this perspective, the Deliverable 7.1.1 presents:

- An introduction including a general overview on the MARKOS project goals and of dissemination structure;
- A specification of the communities and the stakeholders to be addressed by the project (section 2);
- An elaboration on the dissemination tools available to MARKOS to reach the targeted audience;
- An overview on the main phases of MARKOS dissemination activities, structured according to the main project milestones, including a detailed specification of related objectives, communication tools and project assets;
- An insight on the relationship between the dissemination activities and both the exploitation (WP8) and validation process (WP6).

Due to the complexity of the MARKOS project and possible specificities which will certainly raise in the next months according to the evolution of technical and market research, the dissemination activities as described in this plan could be further scoped and adapted. The most immediate example is the forthcoming market analysis study (D8.1.1) that will help scope the project’s dissemination targets further, as well as its core messaging which can reflect the value proposition, delivery models of the platform (i.e. public website portal) and sustainability development.

It is worthy to mention that the workpackage 7 is organised in several tasks, each covering different aspects of the dissemination strategy and contributing to the general “picture”, which the project aims to design:

The *Task 7.2 “Development Publicity and MARKOS website”* includes the preparation of dissemination materials and tools, such as the project website and leaflets.

In addition to this, as all partners are expected to contribute to the dissemination activities according to their own specificities and role within the project and the field. Individual dissemination activities will be set up and described in dedicated reports.

According to the aims of this task, a set of several Deliverables is expected:

D 7.2.1 MARKOS Dissemination Setup

D 7.2.2a MARKOS leaflet on MARKOS introduction

D 7.2.2b MARKOS leaflet on MARKOS Architecture

D 7.2.3a Draft Report on individual dissemination activities

D.7.2.3b Final Report on individual dissemination activities

*Task 7.3 “MARKOS Workshop”*

According to the Description of Work, an international Workshop will be organised close to the end of the project ((D.7.3.0. MARKOS Workshop – Month 29, or nearby). The idea is to promote the

dissemination of final project results to potential users. Therefore the Workshop will be possibly organised in conjunction with an established conference on Open Source or related subjects. One of the conference which could fit the interest of MARKOS is FOSDEM 2014, being a free event offering Open Source communities a place to meet, share ideas and collaborate and renowned for being highly developer-oriented and bringing together 5000 and plus stakeholders from all-over the world.

Anyhow, in order to support and integrate the already planned validation and testing activities, the consortium is considering the idea of both:

- Anticipating the above mentioned workshop at an early stage of the project (between M12 and M18); and
- Organizing additional workshops within the several conferences the project is expected to attend in the OSS field or related subjects (as mentioned in the following Section 3.5). Those events would be very useful for gathering information to develop the MARKOS system, more than just to disseminate the final project's results.

*Task 7.4 “Collaboration with ICT IoS and FI Projects and beyond”* aims to build collaborations with other projects in order to align results, both in terms of research and business in the field and to join forces to reach the target audiences with combined effort.

The MARKOS project has already started to identify the projects with which the collaboration is expected. In most cases the synergies have been planned in relation to existing involvements of MARKOS partners within those projects and initiatives.

More in detail, projects to collaborate with have been identified among the Call 8 IoS funded projects, and possibly even more will be identified during the project lifetime (in particular in the perspective of validating the MARKOS system) according to the forthcoming achievements.

The general aim of this activity is to maximise the impact of the research projects funded by the EC in the field, assuring a sound impact of project results.

A report on the collaboration will be provided at the end of the project to show the achievements in this (D.7.4.1 Collaboration with ICT IoS and FI Projects).



## 2. MARKOS COMMUNITIES

MARKOS objectives towards Open Source Software create parity with the evolution and growth of OSS towards developers and IT stakeholders. The added-value capabilities of MARKOS facilitate OSS discovery and analysis for a variety of stakeholders, such as software architects, developers, integrators, project managers and legal analysts.

To reach these identified dissemination targets, several communications methods have been selected, including:

- The MARKOS project website with updated information on the project progress and the main achieved results;
- Monthly updates on SourceForge.net and Slashdot.org with 4.3 Million unique visitors per month;
- Publication of scientific papers on high impact international journals and in conference proceedings as well as participation in conferences;
- Face-to-face venues for MARKOS stakeholder dialog, such as organized workshops
- Articles in technical online media and OSS online services and newsletters;
- Meaningful linkages to other EU similar projects and initiatives;
- Promotion of project results through the partner's web sites, newsletters and other communication channels such as Fraunhofer FOKUS test beds and laboratories, whose goal is to bring together customers, vendors, and administrations to discuss IT-strategies and solutions.

This report explains in details all the different stages of such a wide dissemination strategy and the way it will be implemented over the project lifetime in order to amplify the project results.

In this perspective, the section 2 is aimed at identifying the profile of MARKOS stakeholders as emerged so far, in line with the first results coming from the requirement definition phase (WP1 – deliverable 1.1.1a, Month 5). As already mentioned, this dissemination plan will evolve throughout the project, not only through the MARKOS capabilities implemented via the technical roadmap, but also other non-technical activities such as the forthcoming market analysis in preparation for Month 7 (D8.1.1).

### 2.1. Stakeholder Roles

MARKOS has a range of dissemination targets based on the stakeholder roles identified during the requirements phase of the project, termed by the project as “System Stakeholders” and “Project Stakeholders”. This stakeholder taxonomy is a representation for MARKOS's development design.

The **System Stakeholders** are those that directly use the system, works with the results of those who use the system and will be impacted by the deployment and operation of a system. The capabilities and value of MARKOS is oriented towards these roles.

*Software Architect:* Any MARKOS user interested to any information useful to design or understand the architecture of software.

*Software Integrator:* Any MARKOS user interested to any information useful to integrate different software component.

*Software Developer:* Any MARKOS user interested to any information useful to develop a new

software component or to evolve an existing one.

*Project Manager:* Any MARKOS user that is the manager of one or more software projects.

*Software Consumer:* Any MARKOS user interested, at least, to high level info on software and projects.

Meanwhile, the **Project Stakeholders** are those that have a vested interest in understanding how the product/system/solution is developed and will be involved in marketing, selling, installing, or maintaining the system.

*Data Integrator:* Anyone interested in using the data provided by the MARKOS service to provide an added value service.

*Service Provider:* Anyone interested to install and/or customize the MARKOS software to provide a MARKOS service instance (e.g. forges, search services).

*Copyright Lawyer:* A professional lawyer or attorney with expertise in copyright law and, in particular, Open Source license compatibility issues.

## 2.2. Reaching Stakeholders

MARKOS forms dissemination targets based on its identified stakeholders. As this dissemination plan is an iterative process, these targets will be refined on the basis of results coming from exploitation/sustainability development and from stakeholder feedback gained during the first prototype's validation period.

The subsequent sections show a general strategy to the development teams of established FLOSS communities, legal community, a wider software & services area (e.g. system integrators) and fellow researchers.

Addressing the above-mentioned communities, MARKOS is aimed to enhance synergies among them in order to support developers, in particular analysts and architects, and how they face common challenges, such as understanding license issues.

### 2.2.1. FLOSS Communities

MARKOS facilitates the discovery and understanding of open-source software, acting as a platform for FLOSS developers to reach their full potential in adoption, as well as allowing themselves to examine and more efficiently interpret the broad spectrum of the potentially compatible software of their peers.

The value proposition towards our primary stakeholders begins with that of discovery of their solutions, similar to the effect of an online marketplace model adding visibility to smaller application developers, or Google's transformation of the internet that soon led to SEO as a priority in website development.

On the other side of the process is the use and adoption of such open-source software. OSS is becoming increasingly popular, yet current FLOSS development teams are still held back from finding compatible solutions due a highly complicated environment of dependencies and licenses.

MARKOS also adds a layer of more efficient understanding of the software, allowing users to become familiar with the components, such as their interfaces and dependencies. This matrix of dependencies reflects the dynamic nature of the principal MARKOS stakeholder: the role of the developer overlaps as both a provider and user via MARKOS - supplying and adopting the discovered OSS solutions. From a communications standpoint, this convergence of roles for the same professional profile brings a common dissemination messaging to MARKOS' campaign.

Supporting MARKOS will provide development and marketing value through both of these aspects: an intelligent search engine in a fragmented and complex landscape, an analysis tool to greatly streamline software and component familiarity, and an additional distribution and support recruitment channel in a visibility context.

To address Open Source communities we plan to engage both with BerliOS and SourceForge hosted projects. Globally we can potentially connect with over 400.000 projects.

Beside this, MARKOS intends to communicate project's advancements as well as project's findings and outcomes through other means such as Geeknet Media channels, including:

- FreeCode (formerly known as FreshMeat), the Web's largest index of Linux, Unix and cross-platform software, and mobile applications ([www.freeCode.com](http://www.freeCode.com))
- Slashdot, a website based on and running the Slashdot-Like Automated Story-Telling Homepage software ([www.slashdot.org](http://www.slashdot.org))

MARKOS has also a 'vertical' Open Source community to target, that includes all Open Source projects we're interested in and that we plan to collaborate with. Among them:

**FLOSSMole:** including data about more than 500,000 different Open Source projects and their developers - that is used by the crawler as a source of information to retrieve data about Open Source projects hosted on forges covered by FLOSSMole. Another important project is Allura Apache (podling), that is the SourceForge Open Source platform used to deliver the forge service to our communities.

**Bitergia:** The Spanish start-up is actively participating in the Apache Allura podling, hence MARKOS collaboration with them might be done via Apache. This has licensing implications, because all code developed at Apache should be released under the Apache License. While this is definitely not a concern for Geeknet Media, since we decided to submit our Allura platform to the Apache Incubator and we're ok with the licensing requirement, others may have problems with that. Even in this case given the highly modular architecture of Allura it would be possible to integrate components with Allura without actually releasing it under the Apache umbrella. Of course this would affect software sustainability, because if integrated privately it won't be possible to take advantage of the maintenance activity happening at the ASF.

**OSS Watch:** OSS Watch has a strong background on OSS evaluation; they're likely to be willing to participate to the exploitation phase.

### 2.2.2. FLOSS Legal Community

Support to the FLOSS Legal Community comes from the ability of the MARKOS system to help developers to analyse licence compatibility issues, taking into account component use relationships.

Another possible scenario could see the developers first searching for all the components implementing the needed interface and then asking MARKOS to filter out components which seem to have licensing issues. Thanks to its legal analysis tools, MARKOS is able to help developers to analyse license incompatibility issues, providing the information needed by legal departments to check the analysis, along with information useful for developers to overcome the issue, such as a list of alternative components which seem to have compatible licenses. We expect the analysis capability of MARKOS to be useful also for discovering licensing issues in existing Open Source projects, helping to promote legal certainty and reduce legal risks when using Open Source Software.

### 2.2.3. Wider Software and Services Area

MARKOS will be able to provide overall outcomes that are not only novel and significant approaches to existing OSS communities, but also to the wider software and services IT landscape at large.

As recent studies illustrate<sup>1</sup>, there is a growing diversity among Open Source adopters in specific community projects, with broad developer networks and commercial community projects, which have vendor independent support channels. In this scenario, as the IT community is unaware of the diversity among OSS projects, the need of MARKOS tools becomes extremely relevant. Indeed, the need of an automatic service providing an integrated view on the Open Source projects available on the Web, focusing on functional, structural and licencing aspects of software code becomes of paramount importance in OSS adoption and integration within enterprises.

It is important to underline that the current economic crisis will force companies not only to find new solutions but better efficiency for software production in order to be competitive. Thanks to its solutions MARKOS will empower the European software industry with a set of tools for quicker, more effective and reliable way to allow their developers and software designers to handle the integration, adoption and customisation of Open Source solutions as viable alternatives. Similarly, MARKOS could help SMEs that are creating their own in-house solutions, supplying them with the OSS building blocks while avoiding the pitfalls of license conflicts and incompatibility.

Bridging the vendor and customer is the potential for IT consultants and integrators to leverage MARKOS has a tool to their services, as well. In the past there has always been a demand for large brands based on the reliability and sustainability of their solutions, yet increasingly stable and supported open-source alternatives can bring a cost savings to the client. Such a maturity and accessibility in OSS allows the “middleman” to find success in this environment, as well, in both a technical (provision, integration, support) and legal (license) context.

Fraunhofer Fokus test beds and interoperability laboratories will be of support in industries engagement, according to their provider-independent, technology-focussed, enterprise-oriented characteristics. Their aim is to bring together customers and developers, offer interesting opportunities and a previously unavailable mixture of open and closed source products and solutions. Commercial vendors and software developers as well as administrations are active partners of the laboratories. The

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<sup>1</sup> Gartner “Hype Cycle for Open-Source Software, 2011”.

laboratories are internationally very well established and organize 150 events yearly, where providers and operators meet in and discuss strategies and solutions. Above all, the ELAN-Laboratories of Fraunhofer FOKUS include international companies such as IBM, Microsoft, Oracle and other target groups and vendors identified as interesting for the MARKOS project.

Atos and Engineering, leaders in IT services and systems integration, are industry partners in MARKOS and will leverage their role as stakeholders, as well, particularly in the industry-oriented conferences and media.

#### 2.2.4. *Research & Scientific Community/Academia*

The way MARKOS intends to reach this community relies on the planned publication of 15 peer-reviewed articles in conferences and scientific journals.

The timing for the submission of the articles is not yet clear at this stage of the project (neither if they will be accepted or not), while it is clear that they will be focused on the following topics:

- Software engineering in general and in particular;
- Mining software repositories;
- Software reverse engineering.

A very detailed list of top conferences and journals on software engineering has already been identified (see Section 3.5 below).

In addition to this, it is worthy to mention existing contacts with the University of Notre Dame (<http://www.nd.edu/~oss/Data/data.html>) which is historically interested into mining forges data, and SourceForge provides them regularly with a dump of the whole projects' database. We expect them to be willing to participate to the exploitation phase.

##### 2.2.4.1. *Collaboration with other EU projects initiatives*

Part of our dissemination approach (Task 7.4) is to establish and maintain meaningful linkages to other similar EU projects through the consortium partners as well as to the offices of the relevant European Commission support networks.

Shared opportunities for dissemination are being explored (such as the involvement in the validation process) and it is planned to implement relevant scientific and research linkages in the next months both to create and join clusters with related initiatives.

In this perspective the *Internet of Services Collaboration Meeting 2012*, organized by the European Commission on October 2012 to launch the Call 8 projects was already a good opportunity for networking. Possible collaborations with the following projects have been envisaged:

#### **PROSE**

This is a Coordination Action Project, which aims to contribute to the adoption of Open Source software on ICT projects, by increasing the lifetime of the software developed inside European projects and thus maximizing projects' impacts, through the creation of a coordination platform for software projects, as well as promoting dissemination and training events on Open Source.

Collaboration with MARKOS could be focused on legal constraints, business aspects to develop OSS, training and tools to develop OSS. Beside this, as this is a Coordination Action, the presence of MARKOS on the PROSE platform could increase the project visibility and sustain the validation and dissemination goals. Geeknet is partner in the project. Since the PROSE platform will be hosted on a SourceForge neighbourhood, we could easily mirror our project by using the already existing mirroring facility in use to replicate BerliOS projects at SourceForge.

Collaboration with this project has been already enhanced with the participation into an online survey aimed at defining the Forge Platform Requirements.

### **OSSMETER**

OSSMETER will extend the state-of-the-art of automated analysis and measurement of open-source software, and develop a platform that supports decision makers in the process of discovering, comparing, assessing and monitoring the health, quality, impact and evolution of Open Source Software.

Therefore, a wide range of possible common developments are envisaged which will be defined in the next months.

### **SUCRE**

PSNC is partner in this project consortium, which is aiming at consolidation of the European cloud computing and Open Source communities by creating a critical mass of stakeholders who will work together on promoting the use of Open Source in cloud computing among others, one of the SUCRE objectives is to voice success stories and EU projects' result beyond frontiers and import best cases studies from the cloud and Open Source Japanese landscape to Europe. To do so, SUCRE is willing to produce a series of dissemination products such as four issues of the International Cloud and Open Source Magazine. In this light, MARKOS Consortium has been invited to verifying possible cooperation.

Beside this, one of the main considerations raised is that MARKOS Consortium is very well settled in the area as its partners participate into other Consortia operating in the IoS community, which will be of help in building a strong community around the MARKOS project to support both the dissemination campaign and the validation process.

To foster to collaboration with other projects, MARKOS representatives will participate to events,/Conferences organized or supported by the European Commission, such as Collaboration Meetings or the eChallenges Conferences and the Future of Internet Assembly (FIA) events.

#### *2.2.5. Policy Makers*

MARKOS can reach policy groups, as well, particularly those oriented towards the adoption of OS solutions, strengthening European SMEs through software and service solutions, and investigating procurement opportunities. On the base of the forthcoming project's achievements both technical (as for the definition of system requirements) and non-technical (as for the exploitation achievements) the Consortium will identify initiatives, which could help leverage projects' results.

A channel which MARKOS intends to use for spreading the project achievements to relevant policy makers is **JoinUp** ([www.joinup.ec.europa.eu](http://www.joinup.ec.europa.eu)), a collaborative platform created by the European Commission and funded by the European Union via the Interoperability Solutions for Public Administrations (ISA) Programme, offering a set of services to help eGovernment professionals to share their experience with interoperability solutions and support them to find, choose, re-use, develop, and implement Open Source software and semantic interoperability assets.

Moreover, at the end of the project, a special issue of Newsletter will be addressed to local, national and European policy makers including a selection of those project's outreaches, which could be of interest in terms of policy recommendations.

### 3. ELABORATION ON DISSEMINATION TOOLS

Section 3 describes in detail the dissemination tools which MARKOS is willing to use in order to reach the targeted stakeholders.

#### 3.1. Website

A dedicated project website ([www.markosproject.eu](http://www.markosproject.eu)) has been set up in the early stage of project development (by Month 3).

The website has been conceived as the central engine of access and dissemination of the project results. It is accessible to the public for the purpose of dissemination and promotion of project contents and results, aimed at attracting also non-expert users.

The MARKOS web site has several specific objectives:

- It intends to perform an *informational role* by publishing core information about the project including outputs and achievements in an accessible and easy way;
- It intends to perform a *promotional role* in particular for the validation process of the MARKOS system.

According to its various nature and scopes, the website is organised in several pages:

##### Home (including static and non-static sections)

The homepage includes static and non-static sections.

In particular, the non-static refers to:

- List of upcoming events
- Blogroll, listing links which could be useful to our users;
- Word Cloud;
- Post box, dedicated to inform the users on the main news related to the project or the field of action.

##### Objectives

This section describes the general project objectives, including links to the Work-packages pages. These will be updated according to the project developments by each WP leader.

##### Expected Impacts

Impacts of the MARKOS project are described here and are detailed according to the different stakeholders we expect to reach. Details on MARKOS Architecture are also included.

##### Consortium

An overview on the whole Consortium, roles and responsibilities in the project are described here. This page includes links to the web site of each partner organisation. On the other hand, partners are invited to link their website to the MARKOS one, in order to maximise the dissemination of the project results.

##### Downloads

This section will contain all dissemination materials produced over the project lifetime. In addition to this, public Deliverables will be available here.

##### Event Calendar

The calendar provides information about the most relevant OSS events



### Open Source

This page includes OS News section and OS Links

### Contacts

Useful contacts are reported in this section, such as the ones of the Project Coordinator and the Technical Manager.

## **3.2. Factsheet and Leaflets**

The MARKOS project Factsheet was produced on June 2012, before the beginning of the project, following an EU request. The Factsheet provides general information on the project such as the goals, objectives, expected impacts, innovative approach and, of course, Consortium.

The release of 2 leaflets is planned:

- The first (D 7.2.2a – Month 5) has been produced at the very beginning of the project (Month 1, instead of Month 5 as planned in the DoW) on the occasion of the IoS Collaboration meeting, organised by the European Commission in October 2012 in Brussels in order to support the collaboration among Call 8.1.2 projects.

The leaflet presents the general objectives of the projects, expected impacts and first use cases scenarios. In addition, the leaflet introduces the activities of Dissemination, Validation and Exploitation addressed to the different project stakeholders, aiming to attract those to be involved in the process from the very beginning.

The Consortium is considered to release an updated version of this leaflet in the following months, in order to provide more detailed and concrete inputs on the first project achievements, such as the “user stories”.

- A second leaflet is planned at Month 20 (D 7.2.2b) and will be focused on the description of the MARKOS Architecture, which, at that stage of project, will be more defined in depth.

## **3.3. Newsletters and Articles on technical online media and OSS online services**

Several newsletters and 12 Articles will be released during the project lifetime in order to inform the stakeholders about the main project developments and achievements. The newsletters will be launched on six-monthly basis, or each time the project will have important messages to disclosure to the targeted stakeholders.

Moreover, at the end of the project, a special issue of newsletter will be addressed to local, national and European policy makers including a selection of those project’s outreaches, which could be of interest in terms of policy recommendations.

Both the newsletters and articles will be published on the project website and released on the main relevant OSS FLOSS communities, first of all:

- BerlioS - The Open Source Mediator ([www.berlios.de](http://www.berlios.de)), 50.000 users registered, 5.000 Open Source projects hosted);

- Source Forge ([www.sourceforge.net](http://www.sourceforge.net)) Over 40M unique visitors per month; Over 3.5M registered users; Over 300k projects;

- Slashdot.org with 4.2 Million users per month, over 5000 messages per day.
- FreeCode, over 500,000 users per month.

Beside this, 12 articles on technical on line media and FLOSS online services will be released. The starting plan in the DoW was to have 4 articles released per year. More than a fixed number of articles per year, the consortium is willing to publish articles in line with the achievements. It is sensible to expect that the articles will be published as outputs of the first prototype release (Month 12), as follow up of the first validation phase (Month 15), or close to the final design (Month 22) and the following second public release (Month 27).

### 3.4. Press release

One press release was planned at the start of the project.

The consortium discussed postponing the press release launch from the very beginning of the project to a second stage, in order to provide more detailed information about the first project achievements.

The consortium is now considering the idea to launch 2 Press Release:

- The first at Month 12, at the time of release of the first prototype;
- The second at Month 27, at the time of release of the final prototype.

### 3.5. Peer Reviewed Articles and Conferences

The Consortium plans to submit 15 peer-reviewed articles within top Conferences and Journal of interest.

Here follow a list of targeted conferences and journals which the MARKOS Consortium consider the most relevant for the project:

#### Conferences:

- ACM Sigsoft International Symposium on the Foundations on Software Engineering (ASE)
- ACM/IEEE International Conference on Automated Software Engineering (FSE)
- ACM/IEEE International Conference on Software Engineering (ICSE)
- Apache Con (NA or Europe)
- Computational Models of Argument (COMMA)
- European Conference on Software Maintenance and Reengineering (CSMR)
- IEEE International Conference on Program Comprehension (ICPC)
- IEEE International Conference on Software Maintenance (ICSM)
- IEEE Working Conference on Mining Software Repositories (MSR)
- International Conference on Artificial Intelligence and Law (ICAIL)
- Legal Knowledge and Information Systems (JURIX)
- Open World Forum (OWF)
- O'Reilly Open Source Conference (OSCON)
- Working Conference on Reverse Engineering (WCRE)
- World Wide Web Conference (WWW)
- International Conference on Web Engineering (ICWE)
- Future Internet Assembly (FIA)
- eChallenges Conference

### Journals/Magazines:

- ACM Transactions on Software Engineering and Methodology (TOSEM)
- Argument & Computation
- Artificial Intelligence and Law
- Communication of the ACM (CACM)
- Empirical Software Engineering Journal (EMSE)
- IEEE Computer (Computer)
- IEEE Software (IEEE SW)
- IEEE Transactions on Software Engineering (TSE)
- Information and Software Technology (IST)
- Journal of Software Evolution and Processes (JSME)
- Journal of Systems and Software (JSS)

### 3.6. Branding

At the beginning of the project, the MARKOS logo has been developed.

Here below is the official brand of the project, which will be used in any activities related to MARKOS project, depending on the needs of the activity (for press releases, presentations, workshops, newsletter articles, institution web-page, etc.).

The idea behind the logo is strictly linked to the objectives and ideas on which the MARKOS project is funded, in particular:

- The variety of colours represents the variety of OSS projects and the Communities to be involved in the MARKOS process;
- The coloured circle, the most harmonious geometric figure, represents the integrated view of MARKOS project;
- The well-balanced structure of rectangles aims to represent a well-structured set of semantic query features.

The MARKOS logo:



### 3.7. The Dissemination Matrix

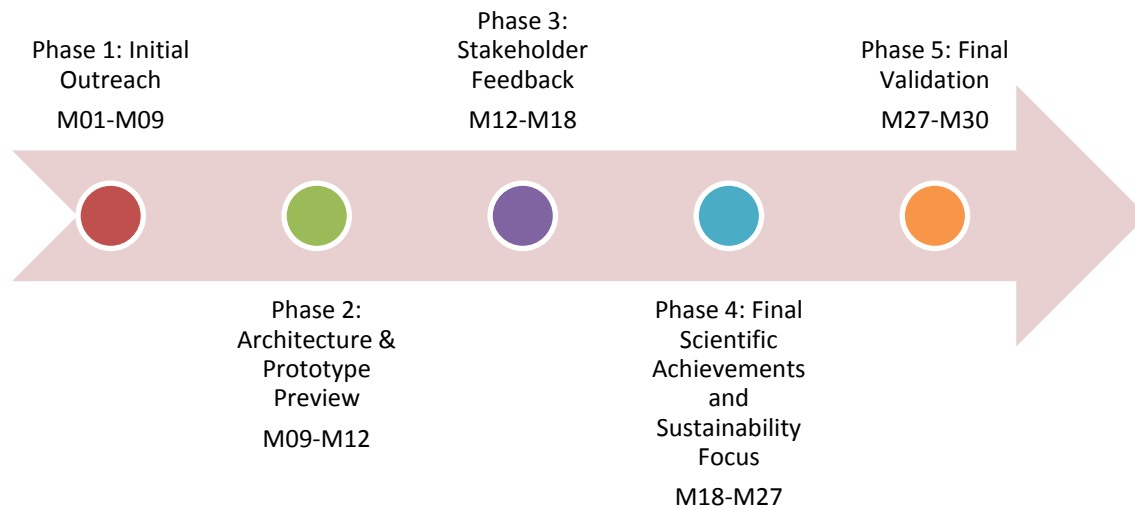
Following the description of targeted stakeholders (section 2) to be reached and the elaboration of dissemination tools (section 3), the table reported below summarises the specific tools, which will be used to address the dissemination messages to each stakeholder category:

<i>Dissemination Tools</i>	<i>FLOSS Communities</i>	<i>FLOSS Legal Community</i>	<i>Wider Software and Services Area</i>	<i>Research &amp; Scientific Community/Academia (including other EU Projects)</i>	<i>Policy Makers</i>
<i>Project Website</i>	X	X	X	X	X
<i>Dissemination Materials (Factsheet / Leaflets)</i>			X	X	X
<i>Newsletters</i>	X	X	X		X
<i>Articles on technical on line and OSS on line services</i>	X	X	X	X	
<i>Press release</i>	X	X	X		X
<i>Peer Reviewed Articles</i>				X	X
<i>Conferences/Events attendance/Workshops</i>	X	X		X	X

### 4. MARKOS: DISSEMIANTION PHASES OVERVIEW

This Section presents an overview on the different dissemination phases, which MARKOS plans to develop over the project lifetime.

As shown in the figure below, the overall process is organized in 5 steps according to the main expected project steps of developments. For each phase, an overview on the objectives, project assets and communication means is provided.



#### 4.1. Phase 1: Initial Outreach

October 2012 to June 2013

Timeline: Kickoff (M1 - Oct. 2012) to Milestone 2 First Design (M9 - June 2013)

##### *Objectives:*

- project announcement and general overview
- establishment of communication channels
- initial stakeholder outreach/dialog on MARKOS / OSS challenges
- leverage market analysis to refine stakeholder priorities and messaging

##### *Project Assets:*

- project overview and objectives
- stakeholder problems to address
- user scenarios tailor-made to identified stakeholders

##### *Communication Means:*

- project overview leaflet in print (D7.2.2.1)
- project overviews tailor-made to multiple stakeholders
- short articles adapted from tailor made project overviews for external online news portals
- Events: stakeholder dialog on MARKOS / OSS challenges

#### 4.2. Phase 2: Architecture and Prototype Preview

June 2013 to September 2013

Timeline: Milestone 2 First Design (M9 - June 2013) to Milestone 3 First Prototype (M12 - Sept 2013)

##### *Objectives:*

- disseminate architecture on scientific level
- anticipate upcoming demo and capabilities
- supporting set up mechanisms to capture external feedback and influence 2nd development cycle and sustainability plans

Project Assets:

- architecture and detailed capabilities
- first prototype preview, including mock-ups of interface

Communication Means:

- 1-sheet preview flyer for prototype
- external forum participation (viral marketing)
- Newsletters/Articles on FLOSS Communities
- scientific paper topics: architecture
- Events: showcase architecture, networking for demo user groups

### 4.3. Phase 3: Stakeholder Feedback

September 2013 to March 2014

Timeline: Milestone 3 First Prototype (M12 - Sept 2013) to Milestone 5 Final Requirements (M18 - March 2014)

Objectives:

- gather external stakeholder feedback on initial MARKOS prototype / demo; focusing heavily on first months of phase so that feedback can be analyzed into requirements (includes extension past internal validation period that ends in Milestone 4 First Validation)
- use stakeholder feedback to influence 2nd development cycle
- concrete dissemination to stakeholder on capabilities via live demos

Project Assets:

- integrated first prototype of MARKOS platform
- architecture
- initial outcomes of implementation WPs

Communication Means:

- press release #1
- updated MARKOS website to launch first prototype external testing
- Newsletters/Articles on FLOSS Communities
- MARKOS workshop to showcase demo (D7.3.0)
- external forum participation (viral marketing)
- scientific paper topics: architecture and initial outcomes of all implementation WPs
- Events: hands-on demo at stakeholder events for feedback

### 4.4. Phase 4: Final Scientific Achievements & Sustainability Focus

March 2014 to December 2014

Timeline: Milestone 5 (Final Requirements - M18 - March 2014) to Milestone 7 (Final Prototype - M27 - Dec. 2014)

**Objectives:**

- stakeholder marketing to support MARKOS developed sustainability plans

**Project Assets:**

- sustainability plans
- initial prototype (continued use until final prototype)
- final requirements and architecture
- final implementation releases

**Communication Means:**

- online article opportunities
- MARKOS Architecture Leaflet (D7.2.2.2)
- external forum participation (viral marketing)
- newsletters/articles on FLOSS Communities
- scientific paper topics: final requirements and architecture, final outcomes from implementation work packages
- Events: research outcomes, recruit stakeholder support for sustainability plans

**4.5. Phase 5: Final Validation**

December 2014 to March 2015

Timeline: Milestone 7 (Final Prototype - Dec. 2014)) to project finale (March 2015)

**Objectives:**

- showcase final prototype and scientific outcomes
- marketing to transition from research project to sustainability plans

**Project Assets:**

- final prototype
- final scientific outcomes
- final sustainability plans

**Communication Means:**

- press release #2
- scientific paper topics: consolidated project results
- Newsletters/Articles on FLOSS Communities
- Newsletter issue addressed to policy maker
- Events: showcase final project results and sustainability plans

## 5. DISSEMINATION IN RELATION WITH EXPLOITATION AND VALIDATION

The MARKOS dissemination strategy has been conceived to be implemented in synergy with the Exploitation Plan (WP8). The stakeholders taxonomy as defined in this first stage will be expanded via the input of WP8, which will help further scope the project's dissemination targets.

The main idea supporting the exploitation plan is to get a clear understanding of the MARKOS related market and analyse the economic forces acting on each actor involved in the business scenario, in order to identify weakness and strengths in the relationship between different actors.

The general objectives of the Exploitation could be synthesized as follows:

- To gather clear, up-to-date and comprehensive information relating to the market
- To analyse from a business perspective the interaction among actors in the scenarios, deriving a value chain and improving synergies among actors
- To monitor the work undertaken in other work packages, in order to collect information and data necessary for drafting short reports, articles and other means of dissemination
- To share the best practices of the project
- To develop individual strategies for each partner in order to create value for the project results. MARKOS partners, in fact, will develop specific exploitation plans and tailor made exploitation strategies on how to capitalize the project results after the end of the project. This should lead at the sustainability of the outputs after the project end. Both the market analysis and the business scenario definition will support this goal.

Towards this process, the WP8 will support the identification and specification of dissemination targets to be addressed along with the dissemination messages. The forthcoming market analysis, in preparation for Month 7 as Deliverable 8.1.1 will give the first contribution to the evolution of the dissemination plan.

More in general, WP8 expected outputs will put in evidence the added values that the MARKOS system provides with respect to the actual market conditions. The added values themselves will be part of the dissemination messages to be addressed to the different targets.

Beside this, reciprocal exchange of synergies between the dissemination and the validation process (WP6) is expected.

The validation of MARKOS system will be developed in two dimensions: in the own project partners' environment and in the Open Source Communities (external validation). A User Interface front end will be used to conduct a comprehensive validation of the MARKOS system both, in the perspective of the achievement of scientific and technological challenges and also in order to assess the system in real life scenarios.

On this regard, dissemination and validation will interact as described below:

- The dissemination will be an interface to assure the full involvement of different stakeholders in the external validation process, addressing tailored made messages via the different means of communication available;
- On the other hand, assuring the collection of feedbacks from external users, the external validation is expected to support the dissemination in addressing contents of forthcoming dissemination materials. Inputs from external validation will make possible the identification of added values brought by the usage of the MARKOS system, which will be part of the message of the dissemination campaign.



## 6. CONCLUSIONS

As emerges from the previous sections, the dissemination plan of the MARKOS project is challenging and aims to address the project outputs to a wide range of stakeholders. This implies the identification of different targeted messages to transmit, as well as the use of specific dissemination tools suitable for each stakeholder category.

On the top of this, the market analysis will result on the definition of the stakeholder taxonomy in the short future (month 7), which will bring further insights to the analysis conducted so far. In the same way feedbacks gained during the prototype validation phase will provide more elements of elaboration.

Accordingly, a fine-tuning process will be put in place in order to assure that all the stakeholder categories, that could benefit from the MARKOS system, are included in the dissemination activities; moreover, that the tools and dissemination means will underlie a continuous verification process.

In this perspective we consider this dissemination plan as a “blossoming flower”, fed by project outputs and being enriched by its achievements during the entire project life cycle.