Abstract: This document describes the planned dissemination and use of knowledge activities, including the organization of and participation to events, the expected collaboration with other projects and the expected results. It is updated every 12 months.
# DNA2.3.1 - DISSEMINATION AND USE OF KNOWLEDGE PLAN

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1. INTRODUCTION

1.1. PURPOSE AND OBJECTIVES OF THIS REPORT
This document outlines the initial dissemination and public relation activities for EMI.

1.2. DOCUMENT STRUCTURE
Section 2 provides an executive summary of this document. Section 3 describes the web site, the
corcepts behind it, and motivates the choices done for its implementation. Section 4 outlines the
dissemination events already organized or planned for the next year, while section 5 shows the EMI
graphic and branding strategies. Section 6 describes the dissemination activities with respect to the
ongoing collaboration programs Section 7 provides an implementation plan for the outlined strategies,
while section 8 describes plans for business communities outreach. Section 9 provides some
conclusion remarks.

1.3. REFERENCES

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| R1 | Liferay  
http://www.liferay.com/  |
| R2 | GNU Lesser General Public Licence  
http://www.gnu.org/licenses/lgpl.html.  |
| R3 | JSR 168 Portlet Specification,  
| R4 | JSR 286 Portlet Specification 2.0,  
| R5 | GridTalk : http://www.gridtalk.org/  |
| R6 | ISGTW (the Digital Scientist from January 2011)  
http://www.isgtw.org/  |
| R7 | eScienceTalk  
http://www.e-sciencetalk.org/  |
| R8 | Scientific Computing World, issue 114, October/November 2010, Warren Clark:  
Supercomputing Stateside, p. 37  |
| R9 | First EMI Technical Conference  
| R10 | EGI technical forum home page  
http://www.egi.eu/EGITF2010  |
| R11 | Google Analytics  
http://www.google.com/analytics/  |
| R14 | Partnership for Advanced Computing in Europe (PRACE)  
www.prace-project.eu/  |
| R15 | ISGTW issue after EMI kick-off  
http://www.isgtw.org/?pid=1002515  |
| R16 | ISGC2011 web site  
http://event.twgrid.org/isgc2011/index.html |
| R17 | ISGTW interviews John White  
2. EXECUTIVE SUMMARY

The EMI project aims to provide production quality middleware services for distributed computing infrastructures (DCIs) and their scientific research communities, and candidates itself as one of the major middleware providers for the large European DCIs. It's clear how dissemination activities play a key role on fostering middleware adoption by large communities. Main target of dissemination activities are thus communities that establishes DCIs. Dissemination efforts will be directed towards broadcasting the EMI project progresses and achievements, in order to expand its initial users-base, extending it from the traditional scientific research environment to the industrial and business activities, where possible. The EMI middleware will be based on the ground of existing solutions developed in the past. Another considerable effort will be devoted toward their interoperability: services developed by EMI are currently strongly integrated with those provided by EGI, and there is an active work on achieving comparable interactions with PRACE [R13]: the full roadmap of collaborations is described in the Collaboration Programs deliverable (DNA2.1.1)[R12].

Web presence is nowadays essential for networked activities. On this regard efforts on the web site have begun since project Day-1: they are described in section 3, together with the main concepts that led its actual design, and improvements planned during the course of the project.

EMI will employ the traditional channels of communication and dissemination for scientific research environments: events and conferences. EMI will organise one international event per year, mainly focused on open source software for distributed computing infrastructures. Participation to relevant events, to broadcast the project outcomes to the most appropriate audience, is also planned, including large scale events, where participation of private companies is expected, so that EMI can bring present its products to these parties and verify their interest. Participation to events is necessarily complemented by another important aspect of dissemination, the graphic and branding strategies, which aim to make the EMI logo widely known, visually supporting its international recognition.

Given the strong liaisons with European DCIs outlined in [R12], it's convenient to also develop common dissemination strategies, exploiting the common users-base to foster common discussions in order to enforce relationships and address common needs. An implementation plan summarizing the outlined strategies is provided in section 7.
3. EMI WEBSITE

The public EMI web site [R13] uses a Content Management System (CMS) to manage its structure and its content. This allows the administrators to rely on a set of already implemented common features and tools and harness the power of the underlying Database Management System (DBMS) which greatly simplifies the tasks of maintaining a rich content web site.

This section includes a description of what has been done, the planned additions and what we expect an informative web site should bring to the project.

3.1. CONTENT MANAGEMENT SYSTEM AND STRUCTURE

The selected CMS for the web site is the Liferay platform[R1]. Liferay is an enterprise level portlet-based CMS. In the following sections we will describe how it was selected and outline the main characteristics of the tool.

3.1.1 Motivations for the Choice of the CMS

The decision to use Liferay was based on a survey conducted by Andrea Caltroni of the NA2 Team during the first month of the life of the project, and an informal evaluation of the existing open source tools suitable for this purpose.

The requirements collected internally by the NA2 team were:

1. Open source license.
2. Widely adopted in the scientific and industrial world.
3. Wide community of developers.
4. Broad availability of plugins.
5. Using an open source DBMS (preferably MySQL.)
6. Written in Java, PHP or Perl (preferably Java.)
7. Possibly used in other scientific communities using Grid infrastructures.
8. Availability of features to easily convey content from different remote sources.

The tools investigated were:

1. Liferay (Java, http://www.liferay.com)
2. Drupal (PHP, http://drupal.org/)
3. OpenCMS (Java, http://www.opencms.org)
5. Twiki (Perl, http://www.twiki.org)

This is a list of considerations which led to the decision.

1. Pretty soon the importance of having a tool written in Java was paramount given the flexibility of the language and the skills of the people in charge of building the site. This pretty much restricted the choice to Liferay and OpenCMS.
2. Tools like MediaWiki and Twiki, although of excellent quality, are too much focused on a particular layout structure to produce a general purpose portal.
3. Joomla! And Drupal, although widely adopted, had the disadvantage of being written in PHP.
4. The portlet technology was also deemed to be very appropriate for our use case given the need to gather content from multiple external sources into a web page.

Its wide adoption among the industry as well other fields was a strong point toward Liferay over OpenCMS. The other requirements were all satisfied by Liferay and the feedback from the existing users was quite good too.

3.1.2 Description of the Tool

The Liferay Enterprise Portal is an open source enterprise portal written in Java and distributed under the GNU Lesser General Public Licence [R2].

Liferay is built on the portlet standards (JSR 168 and JSR 286,[R3][R4]); portlets are the default way to aggregate content on the portal's pages. Portlets are pluggable user interface software components. They produce fragments of markup code that are assembled into a portal page within a layout defined by the user. A portal page is displayed as a collection of portlet windows, where each portlet window displays a portlet. Hence a portlet resembles a web-based application that is hosted in a portal. The only difference is that it is restricted in a window inside a page.

Liferay offers a number of third-party community-contributed portlets and themes, many of which are officially certified by Liferay itself (more than 60).

These portlets implement features such as document library, image library, blog, Wiki, RSS feed display, Calendar, internal email, message boards, social network hooks, tag cloud management, simple poll, alerts and announcements and many other. This on top of classic portal features such as authentication and authorization (with single sign-on), content aggregation, role-based content delivery.

Liferay also allows for the creation of communities and organizations of users. Each user, community and organization has her own private and public pages. The guest community is the default community and hosts the public pages associated to the host name. In our case the guest community has been replaced by the EMI community.

The Liferay administrators can define user groups, password policies, categories and tags, user-defined workflow procedures applied to the creation and publication of web content and many other customizations and configuration parameters.

3.1.3 Structure of the Web Site

The public web site has a main menu on the top section of each page for first and second level navigation.

Second level navigation is repeated on a left side menu together with third level pages. Some pages might not have this side menu where it is not deemed necessary.
Now a small note on how Liferay organizes users, to understand how we use this feature. Users can be assigned to Organizations and they can join Communities either by invitation or openly. Organizations are intended to reflect physical organizations with their branches, locations and a hierarchical structure. Communities are meant to group users based on a shared interest, task, project, etc.

For each event (conference, etc) where a set of pages are needed, a community is created and its public pages are used to manage the content associated with the event. For an early example you can have a look at the First EMI Technical Conference pages associated to the First EMI TC community at the following URL: http://www.eu-emi.eu/web/first-emi-tc/home.

Community sub-sites might use a customized page layout to take into account the specific needs of the content of an event.

Major customizations to the default installation include an EMI theme and an EMI specific 3-column page layout for the main home page.

A portlet to manage surveys has also been created since none was freely available. It uses the Spring Framework to manage the MVC (Model-View-Controller) design, Hibernate for ORM (Object-Relational mapping) of the model and management of the data connection layer, JSP/JSTL for the creation of dynamic content on the pages and a separate MySQL database for the data. This portlet is in the final stages of development at the time of writing. A first version will be available at the end of January 2011. At some point in the future this tool should replace the ones currently used to manage EMI surveys (Zoomerang and Surveymonkey).

The creation of the custom themes and layouts has been performed using the Liferay SDK (Software Development Kit).

As far as the initial data is concerned, all partner organizations have a corresponding Liferay organization and thus the ability to create private and public pages if they need it.

Each visitor can register to gain access to features reserved to registered users and EMI users are added by the administrator to the EMI community.

NA2 people have special privileges to add and modify content for the EMI organization.
3.2. CONTENTS AND THEIR MANAGEMENT
Content has been initially organized in the following areas:

- **Home page.**
- **About.** Contains information about the project and its environment.
- **Middleware.** Contains links and material to help users use the EMI software.
- **Internal.** Contains links to internal resources.
- **Events.** Contains information about events EMI is organizing or taking part in.

The first level page is a summary page with a description of the area itself and descriptions and links to the sections.

3.2.1 The Home Page
The home page is divided in three main areas:

1. The top menu. This is described in the sections below.
2. The left column. This column contains the EMI news, a list of the events and other news concerning the relationship between EMI and the outside and collaborating environments.
3. The central column. This contains an article about a specific feature of EMI, which is displayed on the home page for a fixed time and then rotated with other articles. All the published articles will be available in the EMI Highlights section.
4. The right column. Contains a What's New box with a summary of the parts of the site which have been recently added or updated. Below this box, there is a collections of RSS feeds from the four middlewares with specific news about middleware updates and advisories.

3.2.2 The About Area
This area currently contains the following sections:

- **Contacts.** How to contact the project teams, management and support.
- **Partners.** A list of EMI partners with links to the organizations' home pages.
- **Collaborations.** What EMI is doing in terms of collaborations with other projects.
- **Jobs.** Job offers from EMI partners.
- **In the Press.** A collection of links to articles about EMI in the general and specialized press.
- **EMI Highlights.** A collection of all articles published in the central column of the home page. The first series is about the middlewares represented in EMI and contributing to the EMI distribution.

3.2.3 The Middleware Area
The sections are:

- **Technical Areas.** A description of the technical areas of the project.
- **Product Teams.** The list of product teams and the products they develop and maintain. This area will focus on the actual products instead of the product teams in the future.
- **Downloads.** How to get the EMI software, the available documentation and how to contact the support teams.
3.2.4 The Internal Area
The items of this menu are links to the internal resources of the project:

- Project Page. The intranet web site of the project.
- Mailing Lists. The list of mailing lists and instructions on how to manage one's subscriptions.
- Wiki. The internal wiki. This is the main source of information for EMI members guiding them through the life of the project.

3.2.5 Events
The main page contains a list of articles about events EMI is organizing or taking part in. These events are the same ones listed in the EMI News column on the front page but with a more substantial description and complete information.

The Calendar subsection offers a graphical representation of these events through the incorporation of a Google calendar.

3.2.6 Content Management
At this time the content for the site is supervised and assembled by the EMI NA2 members with the contribution of other project members when needed.

The strategy is to plan in advance a series of contributions on the technical aspects of the middleware and its components, the support infrastructure, events and other key information areas and ask the relevant people in the project to produce those content. Furthermore, future articles will certainly see highlights on the EMI 1 release, and the other components, such as the EMI Execution Service (ES), expected by mid 2011, that will represent major EMI advances.

These articles will be used then as the basis to populate the other areas of the site and will be regularly updated by the authors.

An example of this is the central column article on the home page. NA2 members plan a series of articles about a specific subject and subsequently ask the relevant EMI people to produce the articles. This material is then revised and published by NA2.

3.3. PLAN FOR THE IMPROVEMENT OF THE WEB SITE

3.3.1 Event Pages
Each major event will have its own community and public pages where all the relevant information will be collected as well as advisories and important announcement.

There will be a standard set of actions to advertise these sub-sites so that every interested parties will be aware of its existence. This will include the proper links on all EMI sites, messages on the internal and external mailing lists and announcements at meetings, phone conferences and other events happening before.

3.3.2 Involvement of the Information Sources
In the future, as soon as other members get confident with the organization and administration of Liferay, the plan is to delegate the maintenance of some parts of the site to the actual sources of the information providing all the assistance needed. A specific training might be arranged if requested.

3.3.3 Channels of communication
Every attempt will be performed to create a channel of communication between NA2 and the rest of the project to gather all possible suggestions, requests, issues concerning the structure of the web site
so that they can be addressed. Currently, a mailing list has been setup (emi-web@eu-emi.eu), published on the web site itself, with the purpose of fetching ideas or suggestions for possible topics by site visitors (not necessarily project members).

### 3.3.4 Google Analytics

Google Analytics [R10] is a web-based tool that generates detailed reports about visitors to a web site, providing elaborated info about their provenance and type of visit done. For instance it is possible to see how many visitors came from a search engine (and which keyword they used), their geographical provenance, how much time they spent on the site and the page they visited. It is also possible to set up goals (like viewing a particular page, or downloading a file) and assign a value to them, such to measure achievements of objectives. The EMI website has been connected to Google Analytics, with the aim of better understanding the web site usage trends and thus acquire suggestions for improving not only the web site itself but the whole dissemination strategy.

![Dashboard](image)

**Illustration 1: Number of visits**

A sample visits statistic from the first day of connection to Google Analytics is shown below. Combining the different statistics reported, it is possible to figure out clearly how well the web site is working: for instance, in the above graph one can clearly see a peak on November 22. Restricting the timeline to that day, and visualizing the geographical distribution of visitors (Illustration 3), it can be seen that 50 visitors out of 84 were from Czech Republic. This is perfectly explained by the All Hands Meeting running during those days in Prague, but had it been another external event, data comparison would have given an idea of the event impact on the web site.
383 pages were viewed a total of 2,361 times

| Illustration 2: Top Content |

**Map Overlay**

34 visits came from 14 countries/territories

**Illustration 3: Map Overlay**
3.3.5 Specific Upcoming Improvements
The creation of a specific RSS feed for the EMI distribution is planned. This will be placed on the home page and will contain all the technical news and advisories; when EMI 1 will be released, RSS feeds will be comprehensive of new components releases.

The Downloads Area will be greatly improved with the help and in close cooperation with the SA1 activity, by linking the official repositories for release download.

The Product Teams Area will be removed (January 2011) and the focus will move to the Products instead. The initial introductory content for these pages will come from specialized articles written by the product teams for the central article on the home page of the site.

3.4. EXPECTED RESULT
The expected result of this effort is to have a functional web site where each piece of information is easy to find and addresses the need of the user.

To measure the use and satisfaction of the users we will:

- monitor usage (through Google Analytics), analyze and publish the reports and considerations about the trends;
- create surveys and publish the results;
- keep track of the number of issue/suggestion submissions, the time it took to reach a solution and the outcome;
- monitor the visibility of the site on the press and at events to insure it is the point of reference of EMI on the web.
4. EVENTS

The dissemination and public relations task of NA2 has the objective to identify and organize the activities to be performed in order to promote the exploitation of the project’s results and the widest dissemination of knowledge from the project. On this purpose particular attention will be given to EGI, PRACE and other DCIs that represent largest stakeholders of EMI products, but we will consider also other communities that could possibly extend the initial users-base and go even beyond known DCIs in more scientifically-driven research infrastructures. ESFRI’s and similar environments are being evaluated.

Conference and events are a traditional source of information for these communities. Participation or organization of such events aims to raise users' awareness about EMI activities but also stimulate common discussion with stakeholders about goals, strategies and, if possible, act also as training/demo venue. When possible, partnering on the organization of such events with the relevant actors will be pursued, as this eventually leads to an increased 'presence' of the project into the event, and thus a major effectiveness of the dissemination message.

Equally important is participation to the major computing events in the field of computer science, in order to raise project visibility and enhance opportunities for the start of new collaborations. This will be also relevant to gain insights about future trends and technologies that might be interesting for EMI.

4.1. ORGANISATION OF EVENTS

Direct organization of events has the main goal to broadcast EMI outcomes to its users, disseminating project achievements and future strategies, serving also as place for training and demonstrations.

4.1.1 EMI Technical Conference

EMI will organise one major international Technical Conference per year. This event is expected to initiate a tradition of showcasing European excellence in open source software production. The event will be structured around the software itself, with traditional EMI plenaries and technical area sessions. For a deeper insight in the software features for those who already know the EMI product, there will be the direct participation of the developers in user-oriented sessions called “meet the experts”.

The first such event will take place in Vilnius on April 11-15, 2011; it is organised with EGI and will be held in concomitance with the first EGI User Forum [R 9]. As EGI is currently the main EMI customer, this co-occurrence gives EMI the opportunity to benefit from the widest presence of users, both current and potential, and will kick off the EMI Technical Conference format and style in view of future such events which could hopefully become in time, as the project reaches more achievements and thus more users, larger and autonomous from other events. On the utility of sharing the organization of EMI events along with other similar ones or on the opportunity to start thinking of autonomous organized ones, there is an open debate going on in the EMI management boards.

The first EMI-TC might also coincide with the release of the EMI 1 distribution and thus will be geared towards a structured presentation of the results achieved by the project in terms of usability of the products, the enhancements in terms of interoperability, stability and new features planned for this release. The program will feature also installation workshops for the core EMI components, highlighting major changes introduced by the EMI 1 release. The TC will be the occasion to discuss the critical issues affecting the release distribution, through a direct interaction between users and developers (the “meet the experts” sessions), anticipating this new tradition of an added layer of direct feedback for the EMI products at future EMI technical conferences.

In total, 32 abstracts, over 154 submissions for the whole EGI User Forum, will be delivered by EMI project members, so distributed:
• Demonstrations 1
• Oral Presentations 21
• Posters 3
• Workshops 7

while the abstract spread among classification tracks is the following:

• Data Management - Results 0
• Data Management - Technology 7
• DCI - Implementation 5
• DCI - Standards 4
• Demonstration - Application/User 0
• Demonstration - Technology/Service 1
• Desktop & Volunteer Computing 0
• High Performance Computing - MPI Environments 2
• High Performance Computing - Results 0
• Poster 4
• Producing & Deploying Technology 5
• User Environments - Applications 0
• User Environments - Portals 0
• User Support Services - Application/Community; User Environments - Applications; User Support Services - Infrastructure 1
• User Support Services - Application/Community 0
• User Support Services - Infrastructure 3
• Virtualised & Cloud Computing 0

An EMI-event mailing list (emi-events@emi-eu.eu) has been also created for a better and punctual correspondence among the actors involved.

Interactions with the EGI-event team have occurred in order to optimize the relevant presence, by a consistent presence of EMI members in the event program and organizing committees, and a significant number of tracks (6) are named after the EMI project.

For the second and third project years, the EMI-TC could be held earlier in the year (e.g. February), presumably to correspond with the middleware previews for the EMI 2 and EMI 3 releases. Precise dates of the next events will, anyhow, be decided along with the PEB and accordingly with the possible new results of the project and the new issues to be discussed. The aim of the events is that of increasing the level of interaction between the middleware providers and the user base, and to prepare the grounds for a big European computing event to be internationally recognized as “a major event” in the field, in support of all technological innovation in the area of open source software and middleware and where operational issues could be discussed in depth, along with a wider discussion on the common rules that in the future all major European involved actors should assume. In this respect, the event will also host policy sessions on the future of technological innovation in Europe and discussions of models for providing a sustainable environment in support of innovation efforts.
4.1.2 EMI Flexible Inreach and Outreach

In addition to the large EMI Technical Conference, the project will hold one smaller event per year, organised in a flexible manner in response to ongoing market analysis and other forms of communication set up by the other NA2 tasks and other project activities. Surveys, questionnaires and other forms of communication are being organized to be distributed among the existent and possible-to-be users, even commercial ones, for a reciprocal better understanding of the features of the EMI product and the necessity of the users.

The Flexible Inreach and Outreach events may include training sessions, sessions for collaborating projects, sessions on specific middleware issues, or any activities identified as relevant to current or potential EMI stakeholders.

In particular, a survey to better understand the needs of user from many research and business communities has been prepared with the NA2 training team, in order to organize an inreach/training event specifically tailored to answer to the users requirements. In accordance with the expressed preferences, the event is planned to be held by the end of February/beginning of March, organized as webinar/live event, and will cover aspects related to quality assurance, guidelines for usage of tools used by EMI, and certificate management guidelines.

Further inreach events will be proposed in the second half of 2011, following the same flexible procedure, by means of a web survey for preliminary collection of users preferences on topics and delivery method/period. User feedback on past events, or project management needs might also influence this process, inserting for instance new topics or changing some aspects of delivery method.

This kind of event may or may not be exclusively organized by EMI. For the first year of the project, a more useful activity was the participation of EMI in some aspects of the organisation of the EGI Technical Forum held in Amsterdam on September 13-17 2010 [R 10]. In particular together with the EGI-TF Programme Committee, it was agreed on the possibility for EMI to have some specific issues to be inserted in the parallel session of the programme.

EMI had thus a dedicated session at the EGI-TF Technical Forum to formally present the project (A. Di Meglio), its collaboration program and strategies for communicating with user communities (D. Cresti), and to hear specific evaluations by invited representatives of user communities. The EMI session was held in the Graanbeurszaal room, which was filled over capacity with a lively and interested audience. A half hour for discussion was allotted at the end of the session and the discussion of the plans presented continued well over the end of the session. The EMI session was blogged about by GridTalk at http://gridtalk-project.blogspot.com/2010/09/european-middleware-initiative.html.

Several EMI members gave talks in other EGI-TF sessions, including:

- EMI and the DCI Collaboration (A. Di Meglio)
- Infrastructure Area (L. Field)
- LB Service -- beyond glite-wms-job-status (Z. Šustr et al.)
- MPI Support in gLite (E. Fernández)
- ARC CE for EGI – demo (O. Smirnova)
- Argus Security (V. Tschopp)
- UNICORE Security Basics (K. Benedyczak)
- EMI Release Plan Overview (A. Di Meglio)
- EMI Release Process (C. Aiftimiei)
- Security Aspects of CREAM-CE (M. Sgaravatto et al.)
- AMGA demo (T. Huh et al.)
• The seven-step to Interoperability in the context of EMI (M. Riedel)

For presentation materials please refer to [R9].

An EMI in-reach session was also held during this event with the aim to allow technical people to get more awareness on the peculiar technical features of each middleware consortia (dCache, gLite, UNICORE, ARC) and understand how these can be better integrated and made interoperable in the unified EMI middleware.

The EMI activities in participating in EGI’s event planning will of course continue throughout the life of the project. At the same time, EMI’s future Flexible Outreach workshops will ensure that the project remains visibly proactive and responsive to the needs of its users.

4.2. PARTICIPATION TO EVENTS

Aside from the direct organization of events, it is equally important to participate to the most important and established computing events, in order to disseminate EMI outcomes to the largest and most qualified external communities, with final goal of extending the initial users base.

EMI NA2 plans to establish specific outreach activities to be implemented during its participation at events, increasing its effort to provide attractive web features that will draw audiences to respond to outreach activities and participate in market analysis polls on the site itself. Follow-up activities relating to EMI’s presence at events should be tailored to audience response compatibly with the effort available in the project and in particular in NA2. Contacts established must be pursued in a manner that is efficient and not overly constrained. To this end, the website is being enhanced with social networking tools, and strategies for interacting with dissemination partners such as GridTalk and iSGTW are being set up.

Hereafter follows a selected list of collected/categorized events attended: events where EMI had a booth, posters or other, and a list of events in 2011 where EMI participation is planned

4.2.1 Participation to the Gridka School, Karlsruhe – September 6-10, 2010

EMI NA2 held regular teleconferences with the GridKa school organisers. The GridKa School trainers speaking on EMI topics were contacted and encouraged to view the EMI project as a potential source for training materials, slides, and updated information on the products which they were covering in their talks. GridKa School trainers were put in direct contact with the EMI technical training contacts for their middleware, and encouraged to send their training materials for review by EMI before the School.

EMI provided a speaker on the topic of Grid Security to the GridKa School. NA2 intends to work with the GridKa school again in 2011, while the 2010 event will serve as a model for other future events. Further details can be got at the school home page: http://gridka-school.scc.kit.edu/107.php

4.2.2 Booth at EGI-TF Technical Forum: Amsterdam, September 13-17 September 2010

Within the First EGI-TF, EMI has been present with an exhibition booth where posters on the four main technical areas (data, infrastructure, security and computing) and a general one on the project aims and milestones were purposely produced and exhibited.

As a result of this participation, it can be said that the booth was visited by the majority of participants of the conference and was the place of more deep discussion on technical topics with the visitors, technical experts and users from other projects present on site. As this was the first place where EMI officially presented itself as a new born project, it is assumed that the experience has to be repeated in the same context and in other similar eventual ones, in order to enhance and disseminate the knowledge and the awareness of the EMI technologies. Technical support, for future similar events, is strongly encouraged. In particular is requested the presence of experts related to the four main technical areas, in order to answer to the visitors question and satisfy request for more information.
Another solution could be the presence at the booth of a general technical expert who could act as the reference contact for a deeper follow up, even after the event itself, together with the relevant experts.

4.2.3 Participation to ICT2010: Bruxelles, 27-29 September 2010

A joint booth with several EU funded projects was organized at the event. A poster with all logos and brief presentation of the project was exhibited. EMI was included in it and did result among the participants to the event. EMI also presented its standardisation and interoperability strategy at the Standards for e-Infrastructures & Future Internet Research networking session.

4.2.4 Participation to Super Computing 2010: New Orleans, 13-19 November 2010

EMI participation at SC10 was not done through the official channels: meaning the project did not have its own booth. This must be booked a year in advance so it wasn’t possible for EMI to book one last November, since the project was not yet legally funded at that time. An attempt to be present anyhow, was made, through the hosting offered by projects, institutes and partners of EMI, which had a booth on their own.

Dissemination material have been distributed to these and other booths which may have potential links with EMI. Some extra booths potentially interested to EMI were contacted and spread out of disseminating material occurred.

An EMI poster on the Cream-CE service ([http://www.eu-emi.eu/cream](http://www.eu-emi.eu/cream)) as part of the EMI middleware, with technical details on its evolution was presented along with the EMI logo and its future perspectives within the project in the Italian NGI booth.

A purposely realized small brochure ([https://twiki.cern.ch/twiki/bin/view/EMI/MiscGraphics](https://twiki.cern.ch/twiki/bin/view/EMI/MiscGraphics)) and a branding sticker with the EMI logo were distributed at the following projects and Institutes booths: EGI; INFN/IGI; NorduGrid; Juelich Supercomputing Centre; PRACE; TU Dresden; KISTI; STFC.

A brief article on EMI project was published on the special edition of Scientific Computing World, edited for SC10 [R8].

4.2.5 ISGC2011, Taipei, 19-25 March 2011

The International Symposium on Grids and Clouds [R16] is one of the most important distributed computing forum in Asia Pacific, with a long established tradition on promoting the awareness of grid and cloud computing activities and advance the e-Science application in Asia-Pacific. For the 2011 edition (ISGC 2011), organized in conjunction with OGF-31, two EMI presentations have been accepted will thus be part of the scientific program.

- Patrick Fuhrmann, DESY, DE - Title, "EMI Data, the Unified European Data Management Middleware", in the "Data Infrastructure" Track
- Jon Kerr Nilsen, Oslo, NO - Title, "EMI Proposal for a Storage Accounting Record Standard", in the "Middleware & Interoperability" Track.

Furthermore, EMI project manager Alberto Di Meglio will chair the “Grid and Clouds” session, featuring also a keynote speech. EMI dissemination material will be included in the conference kit distributed to participants.

4.2.6 ISC11: Hamburg, 20-22 June 2011

Another event, which is assumed to be of interest for EMI presence with a booth, is the ISC11 exhibition. The ISC is a yearly, important European event in the sector of HPC and Super Computing, thus, the right occasion to become part of this European appointment, traditionally held in Hamburg in concomitance with the related conference, which this year is planned for June 2011. A booth for EMI has been already requested to the organizers. A confirmation is expected for the beginning of 2011. Having a booth within this exhibition will give the chance to meet visitors, researchers, users from other major DCI’s, projects and most important commercial enterprises who have their own booth
there and could be potentially interested to EMI and become new users of EMI products. It will be the occasion to collect contacts and to show, through the mean of technical presentations made by EMI technical experts, posters and brochure, the ongoing developments of the project. Along with the exhibition, it is planned to apply to some calls of the scientific program of the related conference, in order to have the chance to become part of the program, as well, and to promote a different point of view of the conference topics choice, which typically cover more HPC issues and very few HTC related.

4.2.7 SC11: Seattle, 12-18 November 2011

In order to reach out in a proper way and with more effectiveness a widest audience and new possible users, it is already planned for the next edition of Super Computing (SC11) an EMI booth where more dissemination material can be produced or updating of the existing one can be done and offered to visitors.

It is planned to perform live presentations and demos on site, and face-to-face meetings with current and new potential users, aiming at showing the technical features of the EMI product and, most of all, aiming to promote the product as a competitive one. Technical’s availability and commitment to this purpose will be requested.

A request for a booth reservation has been sent to the organizers of the event and a confirmation is expected for February 2011.

4.2.8 Other Events

An ongoing investigation is currently taking place, in order to individuate other environments worth attending for 2011. It has to be said that most events internationally organized are HPC or cloud oriented, thus it is a commitment of the task to investigate more on HTC eventual events and, if possible, to become direct actors of some conferences, by suggesting and proposing topics for a different orientation, as well as individuating aspects of common interest.

A preliminary list of these events includes:

- ISC Cloud: [http://www.isc-cloud.com](http://www.isc-cloud.com)
- Collaboration Workshop 2011: [http://www.software.ac.uk/home/CW11](http://www.software.ac.uk/home/CW11)
- Nordugrid2011: [http://indico.hep.lu.se/conferenceDisplay.py?confId=1047](http://indico.hep.lu.se/conferenceDisplay.py?confId=1047)

The UNICORE summit and NorduGrid2011 could be of particular importance, being so far a traditional event for communities using UNICORE and ARC.

Another commitment is that of investigating the possibility for EMI to be present in events organized by research environments not familiar with EMI project and products and, furthermore, in commercial and business environments where the evolution of the project will allow the possibility to propose interesting issues for the market.
5. GRAPHICS AND BRANDING

5.1. GRAPHIC MATERIALS

The current EMI logo is a composite of parts of the logos from ARC, gLite and UNICORE. It has been produced in two versions: one in shades of blue, as seen for instance in the headers of the EMI deliverables, and one in silver, which can be seen on the EMI website:

![EMI Logo](image)

*Figure 1: EMI logo, silver version*

This logo is now fairly well recognized, and since the EMI product package is currently named after the project, NA2 does not intend to change it in any substantial manner. As the project progresses and prepares for a sustainable future, the (re-)naming of the product (currently named after the project) and a long term professional logo will become a priority for NA2.

In addition to providing graphical templates for EMI presentations and posters, NA2 produced a set of five posters, displayed for the first time at the EGI Technical Forum in September 2010. This set is composed of a general EMI poster and four technical area posters:


The posters reflect the spirit of unity among the middleware providers, which are shown to be working together in each of the technical areas. These posters supercede an earlier EMI poster that was created for the 2010 UNICORE Summit of May 18-19, which focuses primarily on the individual descriptions of the consortia (see [http://www.eu-emi.eu/documents/10147/13754/EMI_poster_A0_CMYK.pdf](http://www.eu-emi.eu/documents/10147/13754/EMI_poster_A0_CMYK.pdf)).


5.2. BRANDING STRATEGY – PLANNING AND POSSIBLE IMPLEMENTATIONS

Branding is not merely a matter of graphics, but rather a means to increase product awareness via the pervasive placement of a recognizable symbol of the product – the logo – in all contexts where this...
product is relevant. It is this pervasiveness that the project needs to achieve, and the effort required for this is not trivial, and not a concern only for NA2.

In all cases where a specific collaboration is established, the EMI logo will be associated with the relevant collaboration activities. In particular, the project also has created a variant of the logo for the Works-with-EMI program, a highly structured technical collaboration with producers of software that uses EMI components in its functioning. Please see deliverable DNA2.1.1 – Collaboration Programs for further details.

Figure 2: The Works-with-EMI logo

An early attempt at pervasive branding was made to advertise EMI’s presence at the SC10 event, despite the project lacking a dedicated booth. For this occasion NA2 produced adhesive stickers with the logo and the URL of the public website for distribution to all booths that had been identified as being “related to EMI”.

The criteria for being “related to EMI” were essentially considered to be the following:

1. Being a project partner
2. Being a user of some EMI product
3. (Where appropriate, being a collaborating party)

Criterion (1) was fairly straightforward; criteria (2 and 3) were somewhat more complex. Large DCI’s such as EGI are easy to identify, whereas the user communities themselves are not so easy to track. As the project progresses and EMI releases are adopted, the project will establish specific tools to better identify the EMI users, and thus support branding strategies with real use cases and success stories. In particular, other NA2 tasks such as NA2.5 – Sustainability and User Community Relations will be performing various surveys of its user base; the data gathered in these activities will be used to improve the pervasiveness of branding efforts.
6. COLLABORATIONS AND COORDINATION OF PUBLIC RELATIONS

Coordinating public relations with partner projects is a must of the collaboration plan in order to reciprocally promote the exploitation of the projects' results and the widest dissemination of knowledge. Particular attention is dedicated to EGI, PRACE and other DCIs that represent the largest stakeholders of EMI products, but considering also other communities that could possibly enlarge the initial users-base. Other ESFRIs, and projects such as WeNMR have been contacted, and discussions are now ongoing to better understand their possible interest in the EMI middleware and to establish common collaboration actions.

Besides the programmed events, like conferences and meetings, where it will evaluated the opportunity to be present, a particular attention is given to their other means of communication, as newsletters or other in order to investigate if there is a possibility to get a spot once in a while to collaborate with a scientific article or a brief interview with the main characters of the project, such as a technical area leader or a ECB member.

Contacts with some specific press of the computing/grid/cloud sector have been made in order to start a collaboration, once in a while, through the mean of a published article or of an interview. These are: ScienceTalk, iSGTW, IOP, ESFR News, Scientific Computing World, etc. A more complete list of specialized press is being investigated to this purpose.

6.1. JOINT DISSEMINATION WITH OTHER PROJECTS

6.1.1 Dissemination oriented FP-projects

Some contacts have been established with eScienceTalk[R6] (formerly GridTalk[R5]) and iSGTW[R7] in order to investigate the best form of visibility for EMI. An article has been issued soon after EMI kick-off meeting[R15], and it has been proposed the publication of few articles on technical features and the proposal was accepted, i.e. [R17] featuring and interview to Security Area Leader. Interviews to the leaders of the other Technical areas (Compute, Data, Infrastructure) will be proposed in order to better explain which are the topics they are working on and which are the future expectations from it. The technical areas leaders availability on this is strongly requested. The series of interviews is planned to start a couple of week before EMI 1 release, in order to boost the expectations and make sure it is properly advertised; it will continue then as major project milestones will be reached, for instance with the release of EMI Execution Service and other products representing major advances for the project.

6.1.2 Participation to ICT2010: Bruxelles, 27-29 September 2010

A joint booth with several EU funded projects was organized at the event. A poster with all logos and brief presentation of the project was exhibited. EMI was included in it and did result among the participants to the event. In particular interactions occurred with the following projects: eScienceTalk, EGI-Inspire, e-IRGSP2, EuMedGrid-Support, EPIKH, GISELA, Africa ROC, EuIndiaGrid-2, HP-SEE, EUAsiaGrid, IGE, CHAIN.

The event was a strongly EU oriented one, being all the exhibitors and participants from EU funded projects. The booth was visited by many EU decision makers.
6.2. COORDINATION OF DISSEMINATION WITH PROJECT PARTNERS

As a result of a MoU between EGI and EMI, some interactions have occurred with the EGI dissemination and training teams, in order to evaluate some common and joint strategies. The immediate commitment is the co-organization of the EGI-UF/EMI-TF in Vilnius, and the coordination of training strategies in order to develop them complementarily, where EMI will be focusing on middleware installation, configuration.

The understanding is formalized by three milestones:

- M4.1: Advertise the start of the collaboration in each party website with a dedicated static page, article and press releases
- M4.2: Joint technical sessions at EGI and EMI community events disseminating the progress and results of the collaboration
- M6.1: Training sessions at EGI and EMI events with EMI training EGI.eu and NGI trainers as required

For the second year, these activities are expected to continue, and expand: for instance, a high level dissemination of sites' feedback after EMI 1 adoption, or success cases of applications running on EGI infrastructure and benefiting of EMI improvements, can represent an effective proof of a successful collaboration.
7. IMPLEMENTATION PLAN

This section summarizes the guidelines driving the outlined strategies, synthesizing their goals and means through which they will be pursued.

These factors can be classified as critical for a successful delivery of the dissemination activity:

- **effective communication within NA2**: this will be reached through weekly NA2 phone conferences, and by the usage of internal mailing list (emi-na2@eu-emi.eu). This list is accessible from the outside, and can be used in particular by other project members to reach the whole NA2 community.

- **close collaboration with PEB and PO**: the constant participation of activity managers to PEB meetings (either face-to-face or by phone), will ensure that NA2 activity will be matching project needs and expectations, ensuring a constant exchange of information between NA2 and the rest of the project, and making also NA2 initiatives consistent with the project advances.

- **raise a sense of community among EMI users**: for the project sustainability it's vital that all EMI users start as feeling part of a large community. Joint dissemination efforts with EGI and other communities using EMI (or part of it) are the initial mean by which this objective will be pursued, together with the creation of web dedicated areas for discussions, and broadcasting of press release to specific media.

<table>
<thead>
<tr>
<th>Instrument</th>
<th>Procedure</th>
<th>Quantity</th>
<th>Audience</th>
<th>Timing</th>
<th>Done Y1</th>
<th>Plan Y2</th>
</tr>
</thead>
<tbody>
<tr>
<td>EMI web site</td>
<td>Link published on all dissemination material</td>
<td>1</td>
<td>All</td>
<td>Continuous update</td>
<td>1</td>
<td>0</td>
</tr>
<tr>
<td>Event participation/organization</td>
<td>Presentations Booths Material</td>
<td>(Co-)organization of two major events plus participation to 2/3 externals per year</td>
<td>Resource providers, scientific communities, business users</td>
<td>User and IT conferences (EMI Technical conference, SC, ISGC....)</td>
<td>7</td>
<td>8</td>
</tr>
<tr>
<td>Branded material (stickers, gadget...)</td>
<td>Produced for events</td>
<td>As appropriate for the event</td>
<td>Event participants</td>
<td>Linked to events programs</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td>Posters (General and Technical areas)</td>
<td>Produced for EGI Technical Forum</td>
<td>1 for each area, pdf copies available for download on public web site</td>
<td>General public</td>
<td>Update as needed</td>
<td>1serie</td>
<td>2 updates at least</td>
</tr>
</tbody>
</table>
Publications on (e-)magazines (ScienceTalk, iSGTW, IOP, ESFR News, Scientific Computing World)  
Creation of articles for targeted media  
Variable  
According to the media audience  
New releases, milestone achievement or on request.  
2  
4 at least

Table 1: Implementation plan

7.1. METRICS

The effectiveness of dissemination strategies is hard to be measured directly, unless exhaustive surveys are performed. Table 1 reflects, for some of the actions, their key performance indicator (KPI) as reported in EMI description of work, but those number could not be adequate to describe the overall performance of the activity, as they do not describe their real success rate, that needs to be deduced differently.

Organization or participation to large-scale events aims to disseminate as much as possible projects achievement and strategies. Obviously, when organizing events, success can be measured by the number of attendees, and when participating to computing events, can be considered a success to get in touch with major actors of other projects, big enterprises, possible future users of EMI products; it is a success to collect as many contacts as possible in order to start serious collaborations.

Therefore, in order to achieve new contacts and relations it’s not sufficient to exhibit posters or to spread out brochures, but it's needed to deliver technical presentations or demo showing the strong point of EMI software. This cannot be done without the support of EMI technical experts, so an important task for NA2 will be to coordinate presence of technical experts enforcing the impact of EMI presence in such events. Results of these events can be estimated by asking attendees to the conference to fill a form expressing their satisfaction rate for the proposed content. The form might be either web or paper based, depending on the particular type of event: for instance if the participation has been done through a booth in a computing event, then it will be easier to provide a paper form to attendees, while in a large conference would be better to invite listeners to visit the web site and answer few questions. Beside the number of answers to these questions, a valuable support in this case is given by Google Analytics, as shown in 3.3.4; as it allows to distinguish the geographical provenance of visitors, length of their stay on the web site and the path they followed, thus permitting to see how many attendees have really visited the web site and for how long. And this is valid not only for events, but, as said in section 3, GA is a valid instrument to measure the overall success of dissemination activity, at least toward a general audience.

Finally, another metric, at least from the qualitative point of view, could be the number of papers and journal articles referring EMI, or citing usage of EMI technologies.

A table reporting NA2 related KPI is reported below

<table>
<thead>
<tr>
<th>Code</th>
<th>KPI</th>
<th>Description</th>
<th>Method to measure</th>
<th>Estimated target</th>
</tr>
</thead>
<tbody>
<tr>
<td>KNA2.1</td>
<td>Number and quality of events organised</td>
<td>Number of events organized or co-organized by EMI</td>
<td>Follow-up metrics by means of real time online polls and other tools. For example: Did you like our presentation? Was it easy to understand?</td>
<td>2 per year</td>
</tr>
</tbody>
</table>
### KNA2.2 Number and quality of published material

| Journal papers or articles and presentations at relevant conferences produced from EMI research activities | Periodic reports | 4 per year |

### KNA2.3 Number and quality of training events

| Number of training events organized by EMI and number of trained people | Follow-up metrics by means of real time online polls and other tools. For example: Did you like the training course? | 4 per year |

#### 7.2. RISKS AND POSSIBLE MITIGATION

The possible risks of the outlined strategies can consist in a lack of effectiveness of the dissemination efforts, due to different possible reasons: for instance, because the level of information provided might differ from the one needed/expected, being too much technical or too few. To mitigate these risks, follow-up surveys will be conducted by NA2, in order to measure users' perceptions and correct strategies if necessary.
8. OUTREACH TO THE BUSINESS COMMUNITY

It is known that the EMI middleware is tailored to the research community, and the project’s current technical plan is aimed at satisfying the needs of these particular customers. This does not necessarily entail that the EMI products are not commercially viable; some components could catch the interest of major technology providers, as informally seen e.g. during demos at the SuperComputing. Events.

The EMI products will continue to be represented at such events (see above) and is of course open to collaborations with private partners; the effort in this direction should however be tempered by realistic expectations and opportunities must be chosen carefully to avoid wasting project resources on unattainable goals.

One opportunity that NA2 is investigating is participation at the Cloud Computing World Forum (http://www.cloudwf.com). Part of EMI’s technical plans already include development aimed at integrating Cloud technology with the EMI middleware; this integration holds great potential for creating a much broader market by leveraging the Cloud connection.
9. CONCLUSIONS

This document has reported the activities performed in the initial phase of the project by Dissemination and Public Relation task, and the main initiatives planned for the next year. The essential activities for the project start up have been all carried out (web site, logo, graphics), and will support the project as long as it progresses. Dissemination activity will be now focused around the EMI releases: the next major event (EMI technical conference in April) will be in coincidence with the first major release, and thus the event will see structured presentations, demonstrations and training on it. The dissemination process will continue in parallel on major computing events, and through alternative channels like web sites or mailing lists; will be used also project-partner's channels in order to exploit common users-base and strengthen the dissemination message.