

Forum and information pack for key stakeholders

30 June 2022





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Authors	Linda Henriksson (Linda Henriksson (CARR)				
Co-authors	Gillian Arigho (CARR) Stephen Walker (CARR) Rory McGlynn (CARR)					
Reviewers	Emma Teodoro (UAB) Elisa Rossi (ENG)					

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PROJECT PARTNERS

Logo	Partner	Country	Short name
CERTH CENTRE FOR RESEARCH & TECHNOLOGY HELLAS	ETHNIKO KENTRO EREVNAS KAI TECHNOLOGIKIS ANAPTYXIS	Greece	CERTH
Future Intelligence	FINT FUTURE INTELLINGENCE LIMITED	Cyprus	FINT
WHAT TERROCOME ON DEPAND	IDRYMA TECHNOLOGIAS KAI EREVNAS	Greece	FORTH
EVT&	EVT EYE VISION TECHNOLOGY GMBH	Germany	EVT
VISUAL COMPONENTS	VISUAL COMPONENTS OY	Finland	VIS
Y O U B I Q U O	YOUBIQUO SRL	Italy	YBQ
ΠΑΝΕΠΙΣΤΗΜΙΟ ΘΕΣΣΑΛΙΑΣ χρόνια δημιουργίας	PANEPISTIMIO THESSALIAS	Greece	UTH
ENGINEERING	ENGINEERING – INGEGNERIA INFORMATICA SPA	Italy	ENG
innovalia METROLOGY INNOVATION AND ACCURACY	UNIMETRIK SA	Spain	UNIMET
UNIVERSITAT POLITECNICA DE VALENCIA	UNIVERSITAT POLITECNICA DE VALENCIA	Spain	UPV
CARR	Carr Communications Limited	Ireland	CARR
UAB Universitat Autònoma de Barcelona	UNIVERSIDAD AUTONOMA DE BARCELONA	Spain	UAB
TRILATERAL	TRILATERAL RESEARCH LIMITED	Ireland	TRI
(()) KLEEMANN	KLEEMANN HELLAS –INDUSTRIAL COMMERCIAL SOCIETE ANONYME FOR MECHANICAL CONSTRUCTION SA	GREECE	KLEE
Televes	TELEVES SA	Spain	TVES
MICROCHIP	MICROCHIP TECHNOLOGY CALDICOT LIMITED	United Kingdom	MTCL



LIST OF ABBREVIATIONS

Abbreviation	Definition
EC	European Commission
EU	European Union
FAQ	Frequently Asked Question
GA	Grant Agreement
SEO	Search Engine Optimisation
Т	Task
WP	Work Package
QR	Quick Response



Executive Summary

This deliverable introduces the OPTIMAI Forum that will be used as a networking and stakeholder engagement tool during the lifetime of the project and beyond. Details on the platform selected for the Forum and its features as well as a plan for its use are included in this report.

As the title suggests, in addition to the Forum, this deliverable introduces an information pack for key stakeholders. The pack consists of relevant resources that communications partners and amplifiers can use across their own dissemination activities and channels. The elements included in the pack form a comprehensive set of resources developed to help partners and other stakeholders such as industry and worker-led communities, networks and associations raise awareness about and interest in the project. They facilitate effective communication and help multiply the key messages while keeping with the OPTIMAI project brand.

The main outputs of this deliverable are therefore a) the description of the Forum and the rationale behind it, and b) dissemination materials produced for the new Downloads section of the OPTIMAI website. Each individual part of the information pack is briefly introduced and described in this document. The purpose of this supporting document is to provide OPTIMAI partners and reviewers with an overview of the design, functionality and rationale behind different elements of the pack and their place on the website. Screenshots and images are included throughout the document to illustrate the materials being described.

The information pack is not a static resource. It will continue to be developed further throughout the project, with new materials being designed and added as results become available.



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1 Introduction

This deliverable is produced as part of Task 8.2 Clustering, networking and knowledge transfer activities. By utilising the existing communication pathways of established organisations and networks, we can achieve the level of impact needed to ensure adoption of the OPTIMAI results.

Parts of the information pack have been developed by CARR since the beginning of the project, including a project brand, posters, leaflets, roll-up banner, videos, website and social networking profiles, newsletters and infographics. This pack will continue to develop over the second half of the project, with additional elements created and existing materials updated to reflect results as they become available. Suggested content will also be provided for the websites and social media channels managed by relevant communications partners.

1.1 Purpose of the document

The purpose of this document is to describe the role of the Forum and the information pack, and introduce each of the components of the pack to the reader. The report provides an overview of where and how the communications resources will be presented and how they can be used.

Moreover, this deliverable depicts each element of the packs by providing some background on design, potential use and intended audience. As all project partners are involved in the dissemination efforts, it is important that all partners have the opportunity to contribute to the resources that are available and request communications materials that may not already exist. The purpose of this document is also to ensure that all partners are familiar with the content of the information pack.

1.2 Intended readership

The dissemination level of this deliverable is public and is therefore intended for any stakeholder interested in the OPTIMAI project. This report will be of particular interest to partners (both internal and external) involved in the OPTIMAI communication, dissemination and networking activities.

Parts of the information pack will be publicly available through the project website and these resources can be accessed, downloaded, and used by anyone with online access.

1.3 Relationship with other OPTIMAI deliverables

This deliverable is linked to the deliverables listed in Table 1.



Table 1: Relationship between D8.5 and other OPTIMAI deliverables

Deliverable no	Title of deliverable	Link to D8.5
Various deliverables from WP 3, 4, 5, 6	The technical results to be disseminated are described in a number of deliverables	Outputs of technical WPs will be discussed on the Forum
D2.3	State of the art survey	Clustering with relevant projects discussed in D2.3
D8.1	Project website and branding	The resources included in the information pack are available on the project website
D8.2	Communication and dissemination strategy	The strategy feeds into the development of D8.5
D8.4	Report on communication and dissemination activities - 2nd version	D8.4 will report on the implementation of the Forum and the use of the information pack



2 OPTIMAI approach to stakeholder engagement

This section builds on D8.2 Communication and dissemination strategy where the OPTIMAI target audiences were introduced.

2.1 Stakeholder mapping

Since the discussion on target audiences in D8.2, stakeholder mapping has continued as part of T8.2 which involves building networks, creating links with relevant stakeholders and projects as well as engaging in knowledge transfer activities throughout the lifetime of the project. As stated in the GA, "Networks will be established with industrial and academic experts and worker representatives to boost innovation within quality control and zero defects in manufacturing in Europe. Pre-existing communication pathways will be used to achieve the impact needed to ensure the wide adoption of the project's state-of-the-art outputs. Collaboration opportunities with other DT-FOF-11-2020 projects will be sought to facilitate effective communication and ensure far-reaching impact".

In order to utilise the pre-existing communication pathways as effectively as possible, the project stated by identifying and mapping relevant stakeholders, related projects and initiatives as well as potential communication partners on a local, national and European level. An initial list of stakeholders was created in the first year of the project. The stakeholders were grouped around the five main categories of target audiences discussed in D8.2:

- Technology providers
- End users
- Actors in smart manufacturing
- Facilitators
- Enablers

An international and EU level stakeholder list including media contacts complements the lists of national stakeholders formed through each partner's own network of contacts. Combined, these form a rich and diverse portfolio of stakeholders representing a broad range of sectors and geographical areas. Project partners act as agents liaising with their networks, facilitating a smooth sharing of knowledge and stimulating engagement.

An internal networking workshop was organised in June 2022. The purpose of the workshop was to involve all partners in the expansion, maintenance and strengthening of key communications partnerships. Partners were invited to add individuals and organisations from their own networks to the OPTIMAI stakeholder map in the shared workspace.

2.2 Identifying multipliers

Multipliers or amplifiers are individuals or organisations that can contribute to dissemination via professional networks. These are influential in triggering dialogue, shaping opinion and bringing



about change in policies related to the manufacturing industry. Multipliers may disseminate through networks, interviews, articles and social media profiles. Examples include professional networks and associations, educators and trainers, media representatives, actors within civil society, standardisation bodies and European Commission services.

2.3 Key messages by stakeholder group

As stated in D8.2, key messages need to be tailored to each target audience, and they tend to vary based on the context in which they are used. OPTIMAl's long name, which also serves as a key message, is "Optimising manufacturing processes through artificial intelligence and virtualisation". It crystallises the essence of OPTIMAl in eight words.

Examples of selected messages crafted for each stakeholder group are presented below.

Messages for *technology providers* include:

- OPTIMAl's digital twins will be Al-enabled and will provide virtual replicas to specific outcomes, thus simulating real production in real industrial environments.
- OPTIMAl's cutting-edge Human-Computer Interfaces (HCI) place the human at the heart of the operations, as they are developed based on computer vision methodologies and Al in order to understand operators' intentions and proceed with actuation or recalibration.

Messages for *end users* include:

- The OPTIMAI solutions are directly applicable in industry. Once they have been tested
 and validated in the selected pilot demonstrations in a broad set of industry domains,
 their adoption and replication in different fields will be facilitated for the widest possible
 impact.
- OPTIMAl covers multiple industrial sectors and geographically dispersed industrial actors, and thus broadens the impact of the results on European industry.

Messages for *actors in smart manufacturing* include:

- OPTIMAI is at the heart of 'Smart Manufacturing Industries' and plays a key role in increasing and improving green employment in Europe.
- The OPTIMAI concept will foster more attractive high tech work places to boost competitiveness and to offer appealing, sustainable job opportunities to the next generation of workers, engineers and researchers.

Messages for *facilitators* include:

- OPTIMAl contributes to the resilience of industry by introducing digital techniques for flexible and adaptable production methods.
- OPTIMAI is shaping production processes so that they respect the boundaries of our planet.

Messages for *enablers* include:



- OPTIMAI is at the heart of 'Smart Manufacturing Industries' and plays a key role in increasing and improving green employment in Europe. It is estimates that 55 jobs will be created directly and 125 jobs will be created indirectly in the manufacturing industries through OPTIMAI.
- The project accelerates the growth of the smart manufacturing sector by improving efficiency through sustainable automation. The transition towards Industry 5.0 is already underway, and OPTMAI plays a key role in driving this transition towards more sustainable, human-centred and resilient Factories of the Future.
- OPTIMAl ensures regulatory compliance to keep workers safe and satisfied.



3 OPTIMAI Forum

An OPTIMAI Forum has been developed to support and facilitate networking and external communications activities for the remainder of the project and beyond.

As outlined in the Grant Agreement: "A Forum (a dedicated online platform) and an information pack (D8.5) will be created to foster networking with key stakeholders. The Forum will also facilitate effective knowledge transfer for policy, industrial, research and societal use by allowing professionals in the same industry or with similar interests to make contacts, share content, keep informed and join discussions on relevant topics."

WP8 Leader CARR researched three categories of potential platforms (Social Media, 3rd Party Discussion Platform and Dedicated Forum Component) to serve as the Forum. Table 2 to Table 7 present the options considered in order of preference, along with pros and cons for each.

3.1 Platforms considered for the OPTIMAI Forum

Social Media Platform: LinkedIn Group

LinkedIn Groups provide a place for professionals in the same industry or with similar interests to share their insights and experiences, ask for guidance, and build valuable connections.

Table 2: Forum pros and cons - LinkedIn

Pros Cons Limited branding opportunities. Global membership base – it is the Forum is 'owned' by LinkedIn. world's largest professional network with more than 830 People may be members of many million users in over 200 countries Groups on LinkedIn, so there is a need to differentiate OPTIMAL and territories [1]. Forum from others. Strong advantage is that the discussion takes place on a It can be challenging to grow a platform that people visit as part of LinkedIn Group and get members their normal routine. to join and participate in the discussions. It is possible to establish a community of professionals who LinkedIn groups are not 'Open', meaning the Group content is not share a common interest in visible to those outside of it. manufacturing. Can leverage the audience that OPTIMAI already has to build membership. Members of the group can invite other LinkedIn members in-app to join the Group. OPTIMAI can post blog posts on the LinkedIn app and forward the post



to the group newsfeed (i.e., no switching between platforms required to view blog/long-form material).

- Potential members can be located through tracking specific hashtags.
- Many stakeholders and relevant projects have already established accounts on LinkedIn.
- Stakeholders tend to seek out industry news on LinkedIn, as opposed to entertainment or general news.
- Groups (listed) appear on members profiles under 'Interests', giving more visibility.

Social Media Platform: Facebook Group

Facebook is the largest social media site, in terms of number of users. Their Group function is a popular asset of the site, commonly used by niche and local communities to communicate about relevant topics.

Table 3: Forum pros and cons - Facebook

Pros Cons Global membership base - more Groups won't show up on Google than 3 billion users [2]. searches, whereas Pages will. Members of a Facebook Group are Groups do not provide insights and more active than members of a analytics regarding the activity of groups with less than 50 people. Facebook Page. OPTIMAI does not have a Facebook Group Admin can set up a list of questions for interested members account. that they must answer to qualify to Individual stakeholders may be join, to be more 'selective' with the hard to locate due to personal audience. privacy settings. Can stream Zoom meetings & Relevant H2020 / Horizon Europe other meetings live to Facebook projects may not have Facebook Groups, allowing members to pages, and will therefore miss out watch and comment on the on another group of stakeholders. material. Group members can create events within the Group. 'Open' Groups are visible to all Facebook users, increasing the potential for member acquisition.



Social Media Platform: Twitter Lists

Twitter Lists are not a forum page. Lists allow the customisation, organisation and prioritisation of the Tweets a user sees in their timeline. Lists can be created by users themselves, or they can choose to join lists from created by others. Viewing a List timeline will show a stream of tweets from only the accounts on that List.

Table 4: Forum pros and cons - Twitter lists

Pros		Cons
•	Global membership base – 290 million daily users [3] and is a popular marketing channel amongst public and private entities. Can leverage the audience that OPITMAI has already built on Twitter, which stands at over 700 followers currently. Can share Lists across social media via a link. It can be self-sustaining: Content from a variety of sources will show up in one stream, centralising information and updates for users interested in #ZDM, #EUManufacturing, etc. Popularity of hashtags makes finding suitable accounts to add to Lists simple. Many stakeholders and relevant projects have established accounts on Twitter.	 Not a dedicated page moderated by OPTIMAI. Cannot control what other people post; can only remove the user from the list. Users cannot invite other users to join a list, it is only accessible through a link. Twitter characters are very limited, so users would have to follow a link/leave Twitter to view long-form posts. Not popular - the Lists feature was introduced in 2009, however not many interact with it or are aware of it.

3rd- Party Discussion Platform Plugin Integration: Reddit / Disqus

Integrating 3rd-party forum websites such as Reddit or Disqus allows the project to tap into the user-base of the forum website, while displaying the interactions on the OPTIMAI website.

Table 5: Forum pros and cons - Reddit

project website, although the / Disqus. engine powering it is a 3rd party • Smaller membership base.	Pros		Cons
website - a discussion about a		project website, although the engine powering it is a 3rd party service. Usually these discussions would appear in-context on a	 Forum and users 'owned' by Reddit / Disqus. Smaller membership base. Lack of familiarity of the platform



- specific page or article, for example rather than appearing as a dedicated area within the site.
- Users registered to these forumspecific platforms will already be familiar/comfortable with contributing to discussions.
- Users are required to make a Reddit / Disqus account to engage in discussions.
- May be difficult to get stakeholders to visit and engage on another platform.
- Slows down website, affecting user experience and possibly lowering SEO rating for a page.
 Links in comments to other forum discussions make it easy for people to get distracted and leave a page.

A Dedicated Forum Component Built into the OPTIMAI Website: **BBPress plugin for WordPress**

BBPress is a WordPress plug in to create forums with. This plugin provides a communication platform, which people or groups can freely exchange ideas, discuss topics, ask questions, etc., and all engagements take place through the OPTIMAI WordPress site.

Table 6: Forum pros and cons - BBPress plugin

It integrates with any WordPress theme, providing consistency in branding. Can easily create multisite forums and maintain them from one dashboard. Creates dedicated platform for users to engage with EU

• Can build own online community.

Manufacturing content.

 Fully 'owned' by OPTIMAI, no involvement with 3rd party or social media sites.

Cons

- Broadly speaking, the duration of peak project activity usually does not sustain for a sufficient period of time to achieve a critical mass of engagement with users/members.
- Not tapping into the user's daily routine of engaging on apps that they already have accounts with.
- Difficult to attain users.
- Smaller membership base.
- Lack of familiarity on platform.
- Can slow down the operation of the website, affecting user experience.

A Dedicated Forum Component Built into the OPTIMAI Website: **BuddyPress plugin for WordPress**

The BuddyPress plugin is used to create an intimate social network within a WordPress site. With BBPress, users can register profiles on the website, create user profiles, send private messages to each other, add each other as friends, and more.



Table 7: Forum pros and cons - BuddyPress plugin

Pros		Cons					
•	Turns WordPress sites into social networks, allowing admins to build their own online community. Can create sub-committees within user groups, meaning industry professionals could be gathered		Same above.	the	BBPress	cons,	as
	under common interests.						

3.2 Platform selected as the OPTIMAI Forum

The platform that has been selected for the OPTIMAI Forum is a LinkedIn Group.

The group called *OPTIMAI – Forum for Industry 4.0 Stakeholders* was established in May 2022 and can be found and joined <u>here</u>.

OPTIMAI has already established a profile via LinkedIn. The LinkedIn Group function is a means for professionals in the same industry or with similar interests to share content, keep informed and join discussions on relevant topics. It also provides an opportunity for Group Members to make business contents, ask questions, and establish themselves as industry experts.

Groups are accessible from the LinkedIn website and mobile app. Once a person becomes a Group Member, they can read the latest conversations on the Conversations page, or start, or participate in discussions. They can also send a free message to other Members if they want.

Groups are all about building relationships and encouraging conversation and two-way discussion about subjects and ideas that members share an interest in.



Figure 1: OPTIMAI Forum as listed LinkedIn group



3.3 Forum activities

Encouraging Forum engagement:

Once a LinkedIn group has attracted the right members, it is vital to maintain and grow the group. Actively engaging the members, encouraging them to get involved in discussions and return to the group regularly, is necessary for growth. Recommended techniques proposed for growing membership:

• Group name

- Expand the group name from the initial name ('OPTIMAI Project') to include keywords that people would use when searching for groups within LinkedIn.
 - This has been done and the group has been renamed OPTIMAI Forum for Industry 4.0 Stakeholders.
- By ensuring the group appears in search results, it will bring more organic growth to the group.

Invitations

- Create personalised invitations to the multipliers and thought leaders we want to join the group, use tailored key messages to include the link to the OPTIMAI LinkedIn group (with a customised URL that's easy to remember), as well as outlining some of the reasons for joining.
- o Include a call to action (e.g., 'join the group today').
- Send invitations across both the OPTIMA LinkedIn and Twitter accounts.

Engaging new members

 Set up an auto-send message or email to new members, asking them to introduce themselves to the community

Regular messages

- Send regular messages (monthly) to members, offering new information about the project, e.g., downloadable materials from the information pack, news updates, or invitations to upcoming webinars.
- Use the opportunity to ask members to grow the community and spread the word to their contacts by adding a note at the end of the email.

• Create discussions

- The content used on a LinkedIn group needs to be useful to members and add value and meaning to their work in some way.
- Create a calendar of content and discussion topics, selecting those that members can identify with in their professions.
- Ask members to share their experiences and encourage them to actively participate in the discussions.



- Recruit project partners to post discussion topics so there is a variety of contributors and all the posts are not coming from the same person.
- o Ask members for their input on a topic or article shared.

Stay relevant

- o Focus all discussions on the needs, concerns, and issues that the members are facing in their work.
- o Post articles that are relevant to the group's interests.
- o State the relevance to members when sharing articles with the group.
- Make sure to include plenty of industry updates, not just focusing solely on promoting the OPTIMAI project.

• Spread the word

- Ask industry influencers and partners' contacts to tell their networks about the group and encourage them to join.
- o Include the link to the LinkedIn Group in all forms of communications, where appropriate and possible, e.g., in a YouTube video description.



4 OPTIMAI Information pack

This section introduces the OPTIMAI information pack that has been created for key stakeholders. The pack consists of relevant resources that communications partners and amplifiers can use across their own dissemination activities and channels. The elements included in the pack form a comprehensive set of resources developed to help partners and other stakeholders such as industry and worker-led communities, networks and associations raise awareness about and interest in the project. They facilitate effective communication and help multiply the key messages while keeping with the OPTIMAI project brand. Most materials are available to the public through the project website. These include the OPTIMAI brand kit, leaflet, poster, infographic, factsheet, banner and FAQs. These resources can be accessed in the Downloads section of the website where they can be both viewed and downloaded. Any of the resources can be translated into Greek or Spanish or any other local languages if requested.

Materials exclusively available to project partners include editable versions of communication resources such as the PowerPoint presentation template and the conference poster template. These are available in the shared workspace Nextcloud. Partners can edit and populate the templates and tailor them to specific dissemination activities. Stakeholder details containing personal data such as names and email addresses are also only available to the project team.

4.1 OPTIMAI brand kit

The OPTIMAI brand kit includes guidelines for using the OPTIMAI brand and assets. It describes the use of the project logo, colour palette, font palette, imagery and templates. The PDF version of the brand guidelines can be found here.



Figure 2: Brand guidelines



4.2 OPTIMAI leaflet

An initial OPTIMAI leaflet introducing the project was designed in Y1. An updated version was produced in Y2 to include the infographic and a QR code. The PDF version of the leaflet can be found <u>here</u>.



Figure 3: Leaflet front and back fold





Figure 4: Leaflet inside fold

4.3 OPTIMAI poster

An initial OPTIMAI poster introducing the project was designed in Y1. An updated version was produced in Y2 to include the infographic and a QR code. The PDF version of the poster can be found <u>here</u>.



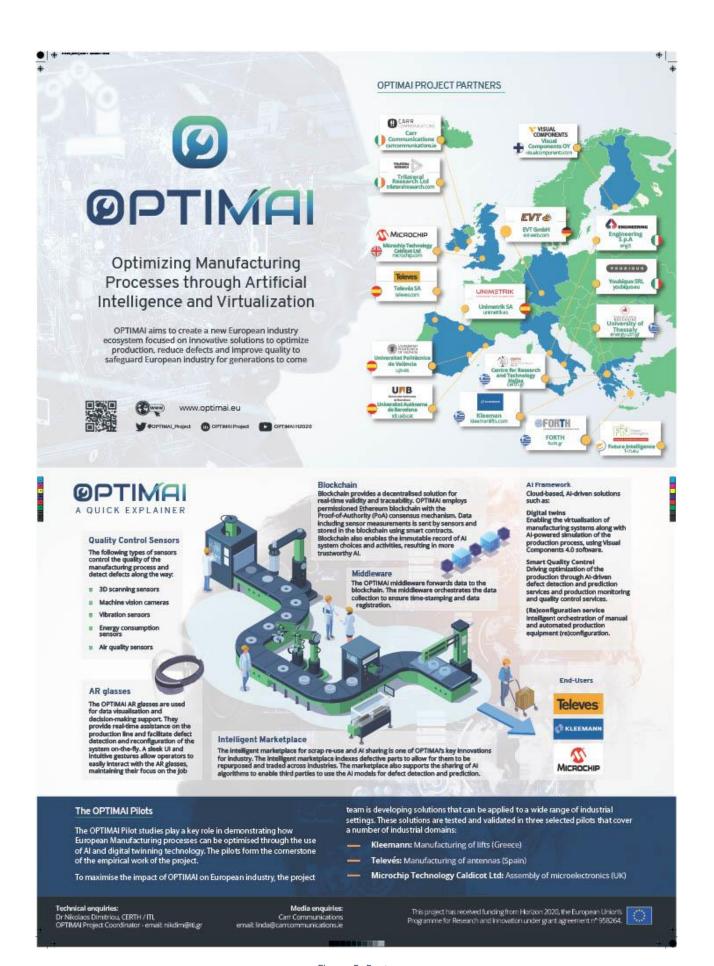


Figure 5: Poster

4.4 OPTIMAI conference poster template

A conference poster template with editable text was designed in Y2. The template can be used by all partners when preparing posters for conferences and other events. It offers a consistent visual look and includes the OPTIMAI branding, partner logos and funding statement while allowing partners to plan the content to suit their needs. The poster is A0 vertical and accessible through the shared workspace. The dimensions and specifications can be modified upon request.





Title of Poster

Subtitle of Poster

Insert list of authors and organisations



This project has received funding from the European Union's Horizon 2020 research and innovation programme

INTRODUCTION

The content is presented in two columns - a left block and a right block. A block can be used to contain text, an image or a combination of both. In cases where a the space available in each pair of blocks is not sufficient, each section can be resized vertically by grabbing a title bar and its corresponding blocks and moving them up/down with arrow keys.







A block of text, on average, can contain between 500 and 600 characters including spaces. The working total will depend on paragraph spacing within each block. The recommended font and size for body text is Open Sans at 36pt. The recommended alignment for paragraphs is "fully justified". Do not adjust blocks or sections sideways, only up or down.

METHOD

The poster should be readable from a distance of two metres. The recommended font and size for title text is Overpass at 60pt. The recommended font and size for subtitle text is Overpassat 46pt. The recommended resolution for images is 300dpi

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RESULTS

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DISCUSSION

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REFERENCES



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PARTNERS

VISUAL COMPONENTS















KLEEMANN















Figure 6: Conference poster template



4.5 OPTIMAI presentation template

The OPTIMAI presentation template made in PowerPoint is used by all partners at meetings and in presentations. It is available in the shared workspace.



Figure 7: PowerPoint presentation template

4.6 OPTIMAI infographic

The OPTIMAI infographic is a visually appealing explanatory graphic describing the OPTIMAI concept. With the shopfloor in the centre, it offers an overview of the technologies, solutions and end users. The PDF version of the infographic can be found here.



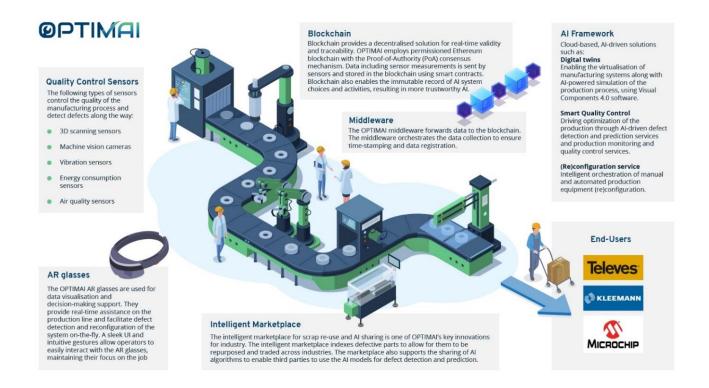


Figure 8: Infographic

4.7 OPTIMAI architecture infographic

A high-level functional architecture view infographic has been drafted. Once the architecture specifications (D2.5) have been finalised, a more detailed architecture infographic will be created and published.





Figure 9: Architecture infographic

4.8 OPTIMAI factsheet

The factsheet available to download on the <u>CORDIS page</u> contains the technical details of the project, including the topic, funding scheme, legal names of beneficiaries and funding details by partner. The PDF version of the fact sheet can be found <u>here</u>.





Figure 10: Fact sheet

4.9 OPTIMAI roll-up banner

An initial OPTIMAI roll-up banner was designed in Y1. An updated version was produced in Y2 to include a QR code. A PDF version of the banner can be found here.





Figure 11: Roll-up banner

4.100PTIMAI FAQs

A set of frequently asked questions (FAQs) and answers has been curated and uploaded on the project website. The purpose of the questions and answers is to provide easily accessible bite-sized information about the project to a wide range of key stakeholders. The list of questions and answers can be extended throughout the second half of the project if relevant.

Questions included:

- What is OPTIMAI?
- How is the project funded?
- Who coordinates the project?
- What partners are involved?
- How long does the project run for?
- What are the key results?
- How will the OPTIMAI solutions be tested and validated?



• How can I get involved?



Figure 12: Project FAQs



5 Conclusions

This deliverable has introduced the OPTIMAI Forum, the rationale behind it and the plan for its development and implementation. This deliverable has also described the content, function and visual look of the information pack produced for key stakeholders. It has described the different components of the pack and provided illustrations of each. The resources outlined in this deliverable have been published in the Downloads section of the OPTIMAI website in M18. These include the project leaflet, poster, roll-up banner, infographic and factsheet. Editable materials, such as the PowerPoint presentation template and the conference poster template, are provided to project partners within the internal document repository Nextcloud. As mentioned in the introduction to this deliverable, the set of resources presented in this deliverable is an initial information pack. The pack can be expanded and modified as the project progresses and more results become available.

The Forum and information pack will ensure that stakeholders are engaged and interested in the OPTIMAI outputs, that there is a platform enabling active dialogue and interaction and informative resources facilitating the sharing of project updates and results. They facilitate the uptake of the results and their extension and application beyond the lifetime of the project.



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