06-12-2022

Milestone M3.7 (M70)
Stakeholder Engagement Plan Y4 Update

Milestone M3.7 (M70)

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Abstract
This Milestone is the third and final annual update on the GN4-3 Stakeholder Engagement Plan introduced in Month 12 of the project. Covering Year 4, it gives the adoption status of the engagement plans and methodology; an update on the instruments supporting the stakeholder engagement activities; and an overview of new engagement channels. It also offers an end-of-project review of the success of the framework, and the outlook for its use in GN5-1.
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Executive Summary

This Milestone is the third and final annual update following the introduction of the GN4-3 Stakeholder Engagement Plan in Month 12 of the project and subsequent implementation progress updates in Months 24 and 36. Covering Year 4, it reviews the adoption status of the engagement plans and methodology, including the main challenges and changes; provides a last update on the instruments supporting the stakeholder engagement activities; and presents an overview of new engagement channels introduced to address new or evolving demands. It also offers an end-of-project review of the success of the stakeholder engagement framework and concludes with the outlook for its use beyond GN4-3.

The GN4-3 Stakeholder Engagement Plan defines, for each Work Package, the stakeholders, engagement channels, frequency and purpose of engagements. The framework provides transparency and alignment but also flexibility for the specific activities planned across the project.

The COVID-19 pandemic required the project to switch from mainly face-to-face engagement to virtual engagement, in which it has developed significant experience and expertise and which has resulted in increased active participation from attendees. While in-person events and meetings have now resumed, virtual meetings are set to continue, whether through adopting a hybrid format, recording meetings and making them available afterwards, or, for regular meetings, alternating between formats. In Year 4, no new stakeholder management instruments were introduced, the emphasis being on refining and enhancing those already in place. In response to emerging needs, new engagement channels were established for both subject-specific and strategic-level collaboration, including Quantum NREN Coordination Meetings, Task Forces on eHealth and Distributed Ledger Technologies (TF-DLT), and a dedicated NREN CEO track at TNC22.

The Stakeholder Engagement Plan and its Y2 and Y3 updates introduced a set of seven quality control instruments to support coordination, reporting, monitoring and evaluation of the project’s stakeholder engagement activities, namely: enhanced GN4-3 event reporting; bi-annual reviews; the Project Management Board (PMB) as a discussion platform; a project customer relationship management (CRM) system; a service uptake key performance indicator in WP3; a dedicated WP3 Task 1 Liaison Contact for each Work Package; and an outreach checklist for new services. Of these, it has been decided not to enhance event reporting, as this would significantly increase the overhead of the Work Packages; the most appropriate and effective format for a periodic review has proved to be an annual review based on a structured, consistent set of questions; extensive work has been carried out to define requirements for, implement and start using the CRM; and since service adoption is being tracked by various other means, it has been decided that an additional key performance indicator is not necessary. All instruments in place at the end of the project will continue in GN5-1.

During Years 1 to 3, six engagement channels were introduced, to address new and changing demands. These are: Chief Technology Office(r) Workshops, Spotlight Programme, South East Europe User
Forum, EuroHPC NREN Coordination Meetings, GÉANT Infoshares and NREN Expert Interviews. In Year 4, four additional channels were established: Quantum NREN Coordination Meetings, TF-eHealth, TF-DLT, and a dedicated NREN CEO track at TNC.

Since its introduction, the GN4-3 Stakeholder Engagement Plan has proved its usefulness in supporting and coordinating stakeholder engagement across the project. It has demonstrated its ability to accommodate the complexity of the project structure and the diversity of its community, to allow the flexibility needed to adapt to changing requirements, and to keep effort overhead to a minimum. While the set of stakeholders has remained unchanged, the instruments for reporting, monitoring and evaluation and the channels for engagement have evolved and increased in number to ensure the framework remains effective and valuable as a practical working tool. It provides a strong foundation on which to build in GN5-1.
1 Introduction

This Milestone is the third and final annual update following the introduction of the GN4-3 Stakeholder Engagement Plan (Deliverable D3.1 in Month 12 [D3.1]) and subsequent implementation progress updates (Milestone M3.3 in Month 24 [M3.3] and Milestone M3.5 in Month 36 [M3.5]).

The GN4-3 Stakeholder Engagement Plan was introduced at the beginning of the project to provide an overview of its stakeholder engagement approach and activities. Acknowledging the autonomy of each Work Package and the coordination role of Work Package 3 User and Stakeholder Engagement (WP3), the plan sets out to define the various stakeholders and the engagement channels on a Work Package level. The framework enables a comprehensive overview of the activities being planned whilst allowing flexibility to adapt to changing requirements over time.

The objectives of the GN4-3 Stakeholder Engagement Plan are to:

- Increase transparency of stakeholder engagement activities across the project.
- Support alignment between Work Packages and avoid both gaps and duplication.
- Support WP3 in its coordination and support role across the project.

Engagement activities change over time to reflect changes in the project’s needs and stakeholders’ requirements. The plan can therefore be seen as a starting point and reference for any future work. The annual updates (Milestones M3.3, M3.5 and M3.7) document the key changes in each reporting period.

WP3 is tasked with overseeing stakeholder engagement and also stakeholder management.

Over the course of the project, a set of reporting, monitoring and evaluation instruments were introduced to support coordination across Work Packages. These instruments, as well as the Work Package-specific engagement plans, have been reviewed annually and adjusted as needed (see [M3.3], [M3.5]).

This document follows the structure of M3.3 and M3.5 and reviews the adoption status of the engagement plans and methodology, including the main challenges and changes, in Year 4, the final year of the project (Section 2), provides a last update on the instruments supporting the stakeholder engagement activities in GN4-3 (Section 3) and presents an overview of notable new engagement channels introduced over the course of the reporting period (Section 4). In addition, it presents an end-of-project review of the success of the engagement plan, supporting instruments and activities undertaken (Section 5) and concludes with an outlook on how the engagement plan is envisioned to be used beyond GN4-3 (Section 5).
The three appendices give the questions asked at the annual stakeholder engagement review (Appendix A), the Work Packages’ feedback from the most recent annual review (Appendix B), and the latest outreach checklist for new services (Appendix C).
2 Adoption of Engagement Plans and Methodology

The GN4-3 Stakeholder Engagement Plan defines, on a Work Package-specific level, the stakeholders, engagement channels, frequency of engagements as well as the purpose of engagement. This framework has provided a clear yet flexible structure for the specific activities planned across the project.

One year into the project, the COVID-19 pandemic hit, forcing a community with predominantly face-to-face engagement to rethink its approach and adapt to fully virtual engagement, whilst individuals and organisations alike were facing changed and more pressing priorities to address the impact of lockdown (see [M3.3]). Following a nearly two-year-long hiatus in face-to-face meetings, the maturity level of virtual engagement increased significantly. This became apparent in:

- Increased diversity of virtual formats.
- Active exploration and use of online tools to support interactive engagement, e.g. Zoom breakout rooms, online white papers, Google Docs, polls and voting tools such as Mentimeter.
- Increased active participation from attendees.
- Recordings of meetings being made available to those not able to join at the given time.

With the occasional exception, face-to-face meetings resumed after the two-year break. For many NRENs and GÉANT staff, TNC in summer 2022 was the first “in-real-life” community meeting in a while.

However, virtual meetings are here to stay. More consideration is now given to whether meetings need to happen face to face. Following the abovementioned evolution in the use of virtual formats, not all meetings need to happen in person to “count” or to be effective. Moreover, many NRENs have established green agendas as part of their business operation, with the aim of reducing the carbon footprint of their activities. Across the project, it is now more common to mix both formats, either by enabling hybrid meetings, recording meetings and making them available afterwards, or, for regular meetings, alternating between virtual and physical meetings (e.g. General Assembly, Service and Technology Forum (STF), South East Europe (SEE) Directors Forum, Special Interest Groups (SIGs) and Task Forces (TFs)).

In the reporting period, no new stakeholder management instruments were introduced. The focus was on refining and enhancing those already in place (described in Section 3).

Several new engagement channels were introduced on both subject-specific and strategic levels. New subject-specific channels include Quantum NREN Coordination Meetings, TF-eHealth and the Task Force on Distributed Ledger Technologies (TF-DLT). On the strategic level, a dedicated NREN CEO track took place at TNC22. (Further details are provided in Section 4.)
3 Instruments to Improve Reporting, Monitoring and Evaluation

The GN4-3 Stakeholder Engagement Plan and its subsequent updates M3.3 and M3.5 introduced a set of quality control instruments to support coordination, reporting, monitoring and evaluation of stakeholder engagement activities across the project.

The instruments were/are:

1. Enhanced GN4-3 event reporting.
2. Bi-annual reviews.
3. Project Management Board (PMB) as discussion platform.
4. Project customer relationship management system (CRM).
5. Service uptake key performance indicator (KPI) in WP3.
6. Dedicated WP3 Task 1 Liaison Contact for each Work Package (added in Y2, see [M3.3]).
7. Outreach checklist for new services (added in Y2, see [M3.3]).

The following sections review the implementation status of each of these instruments to date (discontinued instruments will not be covered in detail), with an indication of whether they will be continued beyond GN4-3.

3.1 Enhanced GN4-3 Event Reporting

This instrument aimed to enhance the understanding and support coordination of outreach activities by adding a new column to the Event Reporting Template, indicating the stakeholder engagement purpose of each event or activity. It was ultimately decided not to pursue this further, as the additional overhead outweighed the gained benefit. Discontinued; see [M3.5] Section 3.1 for details.

This instrument will not be reconsidered for GN5-1.

3.2 Bi-annual Reviews

The primary objective of introducing bi-annual reviews was to enable a periodic, structured review of the stakeholder engagement plans and activities of each Work Package to support successful
operation and delivery of engagement activities across all Work Packages. A secondary objective was to bring more attention to and raise awareness of the engagement activities carried out.

Whilst initially intended to be carried out via dedicated bi-annual review meetings, this instrument evolved over the duration of the project. Different formats and frequencies were explored to identify the most efficient and effective approach, including dedicated meetings between the Work Package Leaders (WPLs) and a WP3 Task 1 representative, an agenda item at the Project Annual Internal Review (PAIR) meetings, dedicated meetings adjacent to PAIR meetings, and written feedback via a questionnaire.

A higher level of formality (with inclusion in the PAIR meetings) was deliberately pursued to begin with, to bring sufficient attention to the topic of engagement and demonstrate its importance to the success of the project. The objective to move, over time, to a more lightweight approach, i.e. a review outside of the formal PAIR process, was successful. Ultimately, the most appropriate and successful format for a periodic review has been shown to be an annual review with a structured set of questions, complementing the regular catch-ups between WP3 T1 representatives and Work Package Leaders. These questions (see Appendix A) have remained the same over the course of the project, to allow consistency and comparability in reporting across M3.3, M3.5 and M3.7. The feedback provided was discussed further as needed.

With regard to GN5-1, the annual structured reviews will be continued. Questions will be adjusted to reflect the by now well-established regular interactions between the dedicated WP3 T1 contact and the Work Package Leaders. The review could be incorporated into the annual support planning for the year ahead.

3.3 PMB as Discussion Platform

As in previous years, the regular monthly meetings of the Project Management Board (PMB) continue to be an effective platform to share and align engagement plans by posing questions, exchanging knowledge and developing ideas and actions for collaboration. This is of particular benefit for activities spanning the whole project or involving multiple Work Packages, such as the Chief Technology Office(r) (CTO) Workshops, the GÉANT Innovation Programme and the incubator work across different Work Packages.

In GN5-1 the PMB will remain an important instrument to support coordination of engagement activities. The Stakeholder Engagement Work Package Leader may further consider periodically inviting Task Leaders to present ongoing work, to increase awareness on a project level.

3.4 Project CRM

The number of stakeholders and engagement topics and the diversity of engagement activities and channels have drastically increased in recent years. Introducing a basic level of tracking is crucial to remain efficient and effective.
Over the last two years, extensive work has been carried out to assess the possibility of introducing a project customer relationship management system (CRM) and defining its core requirements. Eventually, the decision was made to start implementing a CRM for the different stakeholder engagement teams within the GÉANT Association. These teams are represented in GN4-3 by WP3 T1, T2, T3, T4 and WP1 T6. In addition, senior management, and champions within key management functions such as the Project Management Office (PMO) (WP1), Service Delivery (WP9) and Marcomms (WP2) have been added to the initial user group.

The CRM was launched in Q1 2022, and over the course of the year WP3 and WP1 T6 have been working on familiarising themselves with the system and making it their own. The CRM is heavily tailored to meet the demands of the teams, with the objective of reflecting the information and intelligence captured through project activities and events.

By the end of the GN4-3 project, the system is being used to record and track the following:

- Individual contacts.
- Organisations (NRENs, research organisations, funding bodies, etc.).
- Notes and results from bilateral meetings.
- NREN feedback on specific topics.
- Service feedback obtained from the Satisfaction Survey, Service Reviews and other channels.
- Event participation.

For GN5-1, further work is underway to capture GN5-1 and other project participation, NREN service adoption, and to set up the system to enable periodic service feedback and engagement reporting to the Service Work Packages. It is further planned to roll out the CRM to more members of the GÉANT Association participating in WP1 and WP2 in GN5-1.

### 3.5 Service Uptake KPI in WP3

The GN4-3 Stakeholder Engagement Plan proposed considering the introduction of an additional WP3 key performance indicator (KPI), “increase in service uptake or number of piloting partners”, as a further indicator of stakeholder engagement effectiveness, including an information breakdown per service of NREN/user group feedback, engagement and position.

As not all services are available to all GÉANT NRENs, or target them as users, suitable reference points need to be identified for each individual service. This work is being done through the Product Lifecycle Management (PLM) team (WP1 T4) and is being reported on in the Service Review deliverables (D1.7 and D1.13 for Period 1 and 2 respectively, which are already published [D1.7], [D1.13], and D1.19 for Period 3, which is due at the end of the project). Period N Service Review deliverables provide a periodic assessment of the fourteen core GÉANT services in the GÉANT Service Catalogue listed in the Technical Annex, and of any additional production services, using metrics such as KPIs and service adoption by the NREN community and users.

This approach has proved to work well and will remain in place. No further service uptake KPIs have been or will be required to be put in place via WP3.
Tracking of the NRENs’ service adoption across the GN4-3 Service Portfolio is also being done via WP3 Task 3 Stakeholder Insights. This has continued since the start of the project and has become a very valuable tool for the relationship managers to keep track of an individual NREN’s status, carry out benchmarking across all or a group of NRENs, and support service-specific engagement activities such as the expert interviews carried out for WP6 (reported in [D3.5]). A comparison of service uptake between the start and end of the project will be made available by WP3 T3 as part of the end-of-project reporting.

Service-specific feedback continues to be obtained by WP3 T1 through its various engagement channels and service-specific requirements-gathering activities (see for example [D3.5]). Information is shared with the respective Service Owners and fed into the CRM. Feedback from Service Owners from their interactions with NRENs, as well as key results of subject-specific surveys, are also being captured, to get a complete picture.

In GN5-1, service adoption on an NREN level, as well as service feedback received, will continue to be tracked via WP3 and, as outlined above, recorded in the CRM. Periodic reports from the Stakeholder Insights team with a focus on NREN service feedback and requirements will be made available to the Service Work Packages.

### 3.6 Dedicated WP3 T1 Liaison Contact for each WP

After the first year of the project, a dedicated Liaison Contact within WP3 Task 1 Partner Relations and Engagement was appointed for each Service Work Package in the project (for details of this role, see [M3.3] Section 4.1). The objective of this additional measure is to reduce complexity whilst providing tailored support and securing continuous information flow between WP3 and the Work Packages. A collaboration plan with a focus on establishing a successful working relationship has been maintained and updated annually (for the skeleton structure of the plan, see [M3.3] Appendix B).

The respective WP3 T1 team member agrees with the WPL the most suitable way to work together and stay in touch. Most commonly, this can be regular meetings with the WPL, joining WP team calls and/or working on specific items such as support for the rollout of new services. A tailored collaboration approach has been chosen with each Service Work Package to meet the needs of their different set-ups. In addition to all Service Work Packages, a dedicated contact for WP2 is in place to support coordination of communication and outreach activities.

Following feedback received in previous years about lack of clarity regarding the scope of the function, the team has reviewed the role to define it more clearly and differentiate it from the everyday interactions between WP3 T1 and the service teams. Over the course of the project, WP3 T1 has explored the scope of the role, acknowledging that it is carried out in addition to the team member’s other responsibilities. It needs to be manageable and slot into the overall workload without adding an additional burden. It is not a formal role, rather an internally created function to support a more efficient collaboration and knowledge exchange between WP3 T1 and the different project areas.

In some instances, it took a while for the Work Packages to fully understand the function (see the feedback received in [M3.5]). This year’s feedback shows that by now any lack of clarity has been fully resolved and the role is understood and acknowledged across all Work Packages.
Another challenge faced by WP3 T1 was that engagement planning on a WP level has sometimes been shown to be not fully fleshed out, with timelines and the scope of engagement and support requirements changing over time. A significant element of flexibility is required from WP3 T1 to respond to those changes and be able to support ad hoc and at short notice when needed.

WP5 (Trust and Identity) expressed a desire for more intelligence input from the Partner Relations and Engagement Task; this had already been successfully done for WP6 (Network Technologies and Services Development) through the preparation of NREN briefings ahead of the 27th Service and Technology Forum meeting, which featured WP6 services. From GN5-1 onwards there will also be periodic service feedback reporting. Other topics in addition to service feedback might be introduced as well, but have yet to be defined; preliminary conversations about which other topics of intelligence would be beneficial remain inconclusive.

Another suggestion made was to assign backup Liaison Contacts within WP3 T1. Whilst this is certainly desirable, the resources available and planned for in GN5-1 do not currently allow for that. Alternative solutions will need to be considered in the future.

The dedicated Liaison Contact function will remain in place in the new GN5-1 project, with some adjustments to incorporate feedback received and lessons learnt:

- Acknowledging the change of project staff with the transition from GN4-3 to GN5-1, the concept of the function will be reintroduced at the start of the project.
- An annual planning meeting will be held to assess engagement needs. The WP3 T1 Task Leader will join these meetings to coordinate engagement needs across the Work Packages and identify bottlenecks or conflicting planned activities.
- Each Liaison Contact will continue to stay in touch with the respective WP through regular catch-ups and through attending or supporting key events. Catch-ups can be bilateral meetings, team meetings or whatever format is deemed most useful. The frequency may differ between fortnightly and quarterly depending on needs.
- WP3 T1 will explore further how Partner Relations intelligence can benefit service teams and vice versa.
- The collaboration plan will be streamlined to focus on support needs (removing the relationship-building element); outputs will be tracked via the CRM.

### 3.7 Outreach Checklist for New Services

The outreach checklist has, with small adjustments, continued to prove useful to the WP3 T1 Task leader for supporting PLM production gate reviews and subsequent service launches.

The checklist captures the key information required to scope the outreach activities and allows it to be collated in one place. This information is obtained via separate meetings or communications following a successful service production gate review. The most recent template can be found in Appendix C.

The template will continue to be used in GN5-1.
4 Further Adjustments to the Framework

Over the course of the project, the following new engagement channels have been introduced to address new or evolving demands. Unless otherwise stated, these will remain in place for GN5-1.

- **Chief Technology Office(r) (CTO) Workshops** (see [M3.5]) – these have turned into an annual workshop series, with the next series running in November and December 2022
- **Spotlight Programme** (see [M3.5]) – run over the course of a year, this series of in-depth strategic discussions at General Assembly (GA) level has been integrated into the agenda of the GA meetings. The concept of Spotlight has been welcomed by the NRENs (see Satisfaction Survey results, reported in [D3.7] Section 4.5) and can be resumed if needed in the future.
- **SEE User Forum** (see [M3.5]) – a successful one-off event targeting end users in the South East Europe region. The possibility of a re-run within GN5-1 has yet to be explored.
- **EOSC NREN Coordination Meetings** (see [D3.1] Section 7.1) – monthly meetings of NRENs to share updates on and discuss EOSC involvement, strategy and pan-European and national activities.
- **EuroHPC NREN Coordination Meetings** (see [M3.5]) – these have continued as regular meetings, though with reduced frequency over the second half of 2022, responding to the developments in this area.
- **GÉANT Infoshares** (see [M3.5]) – this series of virtual events covering a wide range of subjects is an ongoing offering: 57 infoshares involving 2,656 participants took place between October 2020 and October 2022, with 8 more infoshares scheduled before the end of the GN4-3 project.
- **NREN Expert Interviews** (see [M3.5]) – over the last year an additional set of 9 NREN expert interviews for WP6 has been carried out. The concept has proved beneficial in enabling an in-depth conversation and consistent feedback structure beyond a simple survey, allowing a more complete and complex picture of requirements to be gathered for the service teams to consider. The concept will be available to be used in GN5-1 as needed. However, care needs to be taken to avoid “interview fatigue”, for example in the case of WP6. Alternative market research formats should be explored as well.

New engagement channels introduced during the past year were:

- **Quantum NREN Coordination Meetings** – quarterly NREN coordination meetings serving as a platform to exchange details of national and pan-European developments and inform NRENs on both strategic and tactical levels [QNCM]. These meetings were established as a result of the Quantum Spotlight event held at the end of 2021.
- **TF-eHealth and TF-DLT** – two new Task Forces that have been established to support knowledge exchange and collaboration on eHealth and Distributed Ledger Technologies [TF-eHealth], [TF-DLT].
Further Adjustments to the Framework

- **CEO Track at TNC22** – a dedicated full-day programme of events for NREN CEOs across the globe to meet, discuss strategic topics and brainstorm solutions to tackle the most pressing challenges. Topics of this first CEO track were: NREN sustainability, security, and sharing of services.

These activities will also continue in GN5-1.
5 Review of the Stakeholder Engagement Framework

With the introduction of the GN4-3 Stakeholder Engagement Plan (D3.1), a framework was introduced to support coordination of engagement activities across the project. It aimed to increase transparency and alignment, while keeping additional overhead to a minimum and allowing flexibility to adapt to changing requirements. It also set out to acknowledge the complexity of the federated project structure, with contributors across more than 40 partners, often with only little manpower allocation.

Reviewing its evolution since its introduction, and the feedback provided by the Work Package Leaders, the framework still holds. Adjustments have been made mainly through the addition of instruments to support the execution of the framework and a diversification of the engagement channels.

The set of identified stakeholders in D3.1 Section 4 has not changed as such, but priorities have shifted in some cases. The means of engagement, monitoring and reporting (as outlined in D3.1 Section 5) have further differentiated and changed, the main driver here being COVID-19. The toolkit introduced in Section 5.1 is still very valuable and should be promoted more across the project to support stakeholder engagement planning on a Work Package and Task level. Regular interaction and coordination between WP3 and the other Work Packages has proved to be very efficient and beneficial in ensuring effective engagement.

The framework remains first and foremost a practical working tool which requires annual reviews and subsequent adjustments, as evolution in response to changing circumstances and requirements is to be expected.
6 Conclusions and GN5-1 Outlook

The introduction of the GN4-3 Stakeholder Engagement Plan has proved beneficial to increasing transparency and supporting engagement coordination across the project. A lightweight framework is being applied that allows the Work Packages to execute their plans without much interference and additional overhead.

Over the course of the project, a wide range of reporting, monitoring and evaluation instruments to support the management of stakeholder engagement have been introduced, tested and implemented. The majority of them are still valid, with some having been adjusted as a result of lessons learnt, and are fit for use within the next project. At the end of GN4-3, the Stakeholder Engagement team now has an evolved toolkit consisting of:

- Dedicated Liaison Contact for each Service Work Package.
- Annual reviews and engagement plans on Work Package Leader level.
- New service outreach checklist.
- CRM.
- PMB as discussion platform.

As documented in the Plan and subsequent updates, stakeholder engagement has evolved in complexity and maturity throughout the project. This enables the different Work Packages to benefit from a variety of tried and tested engagement channels and formats, allowing them to tailor and maximise the benefit of each activity. WP3 will ensure that different formats and approaches targeted to the respective audience and engagement objective continue to be considered, to avoid falling back on standard solutions.

In GN5-1 several changes are being introduced which will impact stakeholder engagement and require consideration:

- The European Commission will gain importance as a stakeholder across the project; a new Task in WP1 (EU Liaison) will be introduced. Also, the e-infrastructure engagement activities (currently under WP3 T1) will have grown significantly in scope and will move to a separate Task under WP3.
- With the further expansion into end-user services in GN4-3 and its continuation in GN5-1, an increased effort will be required to identify an engagement approach that respects the NREN boundaries, working with the resources available in the project, whilst increasing the impact on end users. New engagement models will need to be explored for this. The Community Programme could build an important bridging element here.
• Co-creation will gain importance in service development to increase responsiveness and leverage the expertise of our NREN partners and subsequent end users. Co-creation models in line with the NREN relationship and project engagement activities will need to be defined.

With the increased complexity of the R&E landscape and responsibilities that the GN5-1 project has towards its partners, a strong, close relationship with stakeholders and regular, tailored engagements are key to remaining effective. The NREN Relationship Managers in their double role as dedicated Liaison Contact for the WPs, combined with the insights captured in the CRM, will play a central part in securing this. During GN4-3, an excellent foundation for the continued successful collaboration between the Service Work Packages and WP3 has been established, upon which all future collaboration can build.
Appendix A  

**Annual Review – GN4-3 Stakeholder Engagement Questions 2022**

**Purpose:**
Review the status of the planned stakeholder engagement activities as defined in D3.1 and changes since last year’s review in M3.5.

**Reference D3.1 GN4-3 Stakeholder Engagement Plan (2019/2020)**

https://tinyurl.com/3r34jvbm

**Questions**

1. Reviewing your outlined stakeholder engagement plan for 2021/2022, what went well / what caused challenges?
2. Were there any other adjustments/changes to the plan since 2021, and what were the reasons for that? (Include, e.g., change of stakeholders the WP needs to engage with.)
3. Which channel do you consider most successful and why?
4. Any engagement gaps?
5. Any lessons learned?
6. Do you consider the dedicated person in the Partner Relations team to support you with stakeholder engagement as beneficial?
7. What is your one big challenge when reaching out to NRENs/stakeholders that would make your life easier if resolved?
8. Anything specific that WP3 (Partner Relations, Research Engagement, Insights, Community Programme) should provide support with looking ahead to GN5-1?
9. Looking ahead to GN5-1, are you considering any key changes, i.e. stakeholders, activities or priorities or engagement topics?
Appendix B  Annual Review – GN4-3 Stakeholder Engagement WP Feedback

B.1  Support Work Packages

<table>
<thead>
<tr>
<th>Questions</th>
<th>W1</th>
<th>WP2</th>
<th>WP3</th>
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<tbody>
<tr>
<td>1. Reviewing your outlined stakeholder engagement plan for 2021/2022, what went well / what caused challenges?</td>
<td>• Securing sustainable funding for GÉANT in the long term was very successful with the inclusion of a new SGA in the Work Programme 2023–2024.</td>
<td>• The full refresh of the GÉANT web presences was completed, with individual sites for key areas, all joined together with a common navigation and new home page, making the user experience easier and more effective, and better supporting stakeholder engagement.</td>
<td>• With travel being impacted by COVID-19 up until summer 2022, the challenges and amendments to the previous year’s plan remained (virtual meetings, shorter / more frequent meetings, lack of conference engagement especially for the Research Engagement team).</td>
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<td></td>
<td>• Maintaining good relations with our key stakeholders in the European Commission and other institutions was successful.</td>
<td>• Alongside this, our social media channels continued to engage with diverse audiences and drive them to our websites, supported by the weekly newsletter and magazine.</td>
<td>• Travel started again at the beginning of 2022 and this has considerably improved our work overall and specifically in Research Engagement (T2) and with the ability to meet with NRENs face to face.</td>
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<td></td>
<td>• Stakeholder engagement was very successful for Human Capital Development with many online training sessions.</td>
<td>• TNC returned to an in-person event, bringing the community together again and making a very positive impact on engagement with all audiences.</td>
<td>• The ability to make new contacts and attend conferences in person, e.g. ICRI, EGI, NREN conferences, has reinforced the importance of face-to-face interactions when building relationships.</td>
</tr>
<tr>
<td></td>
<td>• Procurement was also successful with understanding procurement requirements and ensuring the products and</td>
<td></td>
<td>• The 2022 Satisfaction Survey shows an increased satisfaction with Partner Relations.</td>
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</tbody>
</table>
### Questions

<table>
<thead>
<tr>
<th>Questions</th>
<th>W1</th>
<th>WP2</th>
<th>WP3</th>
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<tbody>
<tr>
<td>services procured meet those requirements, ensuring procurements comply with the necessary laws and regulations, helping to build consensus among the community with regard to how resources should be spent, and where and what should be procured.</td>
<td>• There are always challenges with consistently engaging NRENs around services marketing (though this continues to improve) and not affecting nationally offered services; and engaging with multiple partners/stakeholders to create success stories for the Impact website.</td>
<td>• The Community Programme has continued to attract more global participants, with higher attendance at virtual meetings. As we return to face-to-face meetings, more focus on hybrid set-ups to enable as many as possible to attend.</td>
<td></td>
</tr>
<tr>
<td>2. Were there any other adjustments/changes to the plan since 2021, and what were the reasons for that?</td>
<td>More physical meetings.</td>
<td>TNC returned as an in-person event after the virtual TNC21 and cancelled TNC20, with a successful community engagement event with attendance from multiple stakeholder groups in Europe and beyond, including commercial partners.</td>
<td>• Spotlight programme continued until Q1 2022.</td>
</tr>
<tr>
<td>3. Which channel do you consider most successful and why?</td>
<td>Virtual meetings while travelling is still difficult.</td>
<td>The CONNECT family of channels (website, newsletter and magazine) consistently receives significant contributions from the community, and the readership of the newsletter and website continues to grow.</td>
<td>Same as in previous year:</td>
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<tr>
<td>Questions</td>
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<tr>
<td>4. Any engagement gaps?</td>
<td>None</td>
<td>• Continues to be “downstream” outreach to the institutional/</td>
<td>We continue to monitor the set-up of the Common European Data spaces and the GAIA-X initiative. Relevant engagements will take place once these are mature enough and it is clearer on the direction of these initiatives.</td>
</tr>
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<td></td>
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<td>departmental level. As GÉANT’s service portfolio moves into value-added</td>
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<td></td>
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<td>services, this group of stakeholders will increase in importance.</td>
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<td></td>
<td></td>
<td>• Ongoing challenges with engaging breadth of NREN community with</td>
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<td></td>
<td></td>
<td>future topics/projects/funding.</td>
<td></td>
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<tr>
<td>5. Any lessons learned?</td>
<td>Virtual meetings / virtual training could be a successful channel.</td>
<td>The need to engage early and consistently with stakeholders on</td>
<td>We have found new ways to interact with the community both during and after COVID. The lessons learned, i.e. around preparation and running of virtual meetings, will be continued in order to ensure efficiency of our external engagements.</td>
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<td></td>
<td></td>
<td>European-level topics, e.g. EuroHPC, Quantum, etc. This has been</td>
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<td></td>
<td></td>
<td>addressed already for GN5 with the establishment of a dedicated Public Affairs Task.</td>
<td></td>
</tr>
<tr>
<td>6. Do you consider the dedicated person in the Partner Relations team to support you with stakeholder engagement as beneficial?</td>
<td>n/a</td>
<td>Yes</td>
<td>n/a</td>
</tr>
<tr>
<td>7. What is your one big challenge when reaching out to NRENs/stakeholders that would make your life easier if resolved?</td>
<td>No big challenge. • CRM was definitely a helpful addition.</td>
<td>The continuing challenge is for national-level marcomms, balancing GÉANT messaging/focus and national focus.</td>
<td>Nothing in our control (COVID-19).</td>
</tr>
<tr>
<td>8. Anything specific that WP3 (Partner) Make CRM even more beneficial for the project.</td>
<td>Potential workshops relating to joint outreach on services marketing.</td>
<td>n/a</td>
<td>n/a</td>
</tr>
</tbody>
</table>
### Questions

<table>
<thead>
<tr>
<th>Questions</th>
<th>W1</th>
<th>WP2</th>
<th>WP3</th>
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<tbody>
<tr>
<td>Relations, Research Engagement, Insights, Community Programme) should provide support with looking ahead to GN5-1?</td>
<td></td>
<td>No big changes.</td>
<td>No big changes.</td>
</tr>
<tr>
<td>9. Looking ahead to GN5-1, are you considering any key changes, i.e. stakeholders, activities or priorities or engagement topics?</td>
<td>No big changes.</td>
<td>Priorities are around the bigger topics – EuroHPC, Quantum, etc. – and gaining consistent and early engagement from stakeholders.</td>
<td>No big changes.</td>
</tr>
</tbody>
</table>

**Table B.1: Annual stakeholder engagement review – Support WPs feedback**

### B.2 Service Work Packages

<table>
<thead>
<tr>
<th>Questions</th>
<th>WP4</th>
<th>WP5</th>
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<th>WP7</th>
<th>WP8</th>
<th>WP9</th>
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</thead>
<tbody>
<tr>
<td>1. Reviewing your outlined stakeholder engagement plan for 2021/2022, what went well / what caused challenges?</td>
<td>Overall fairly similar to and a continuation of 2020/2021: • Planned meetings/forums were held regularly, and</td>
<td>Calls on T&amp;I business development activities have proved to be helpful.</td>
<td>Continued dissemination activities to a wide range of events and audiences went well – our users</td>
<td>The WP7 team organised a BOF session at TNC22 on the topic of “New form-factors for coherent optics,</td>
<td>Challenge: Getting security baseline under the attention of NRENs.</td>
<td>Challenge: SIG-ISM steering</td>
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Appendix B Annual Review – GN4-3 Stakeholder Engagement WP Feedback

<table>
<thead>
<tr>
<th>Questions</th>
<th>WP4</th>
<th>WP5</th>
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<tbody>
<tr>
<td>the community was informed about the relevant topics on time.</td>
<td></td>
<td></td>
<td>• The PR contact is doing a great job by sharing information about the activities carried out by the team and it does help that the person has a general understanding about T&amp;I. It would help if such a general level of understanding on T&amp;I would be shared by somebody else in the team in addition, to serve as backup.</td>
<td>could hear about our work and we were able to gather valuable feedback.</td>
<td>a disruptive technology?&quot; This session was very well received; we invited speakers from Infinera, Juniper, Nokia and Ciena.</td>
<td>committee could do with a refresh.</td>
</tr>
<tr>
<td>• Uptake and usage of the GÉANT cloud services, especially the 2020 Cloud Framework Agreement, was a big success. Consumption in 2022 is the highest ever by far!</td>
<td></td>
<td></td>
<td>• Due to COVID, most events and discussions were virtual. While this allows presentation of material and questions, we missed the opportunity to have the “coffee and corridor” discussions with attendees between sessions and at any evening events.</td>
<td>• In anticipation and preparation for the Packet Layer Renewal tender, we engaged with many vendors.</td>
<td>• What went well: focused Partner Relation team members for security is much appreciated.</td>
<td>• Adoption of Best Practices by GN software development team is still very low. The PMO plans to apply more checks on software projects at PLM gates and this will hopefully encourage better engagement.</td>
</tr>
<tr>
<td>• There were no in-person cloud trainings organised by the GÉANT Cloud team in 2022 but there have been several online infoshares and webinars.</td>
<td></td>
<td></td>
<td>• On the other hand, we probably had attendees who joined online who might not be able to travel to in-person meetings.</td>
<td>• WP7 also provided updates to the GÉANT members via STF meetings and wider R&amp;E community via presentations at SIG-NGN, TNC and APAN meetings.</td>
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Milestone M3.7 (M70)
Stakeholder Engagement Plan Y4 Update
Document ID: GN4-3-22-8B2EB5
### Questions

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<tr>
<td>2. Were there any other adjustments/changes to the plan since 2021, and what were the reasons for that?</td>
<td>Service management of some of the community cloud developments suffered from the departure of key person(s).</td>
<td>Each T&amp;I service has their own plans which are revisited periodically. Most of the engagement is done within each service.</td>
<td>Not many. We were continuously looking for opportunities to present our work at different events and in different forms, thus ending with more dissemination activities than planned.</td>
<td>No.</td>
<td>No adjustments.</td>
<td>Since in-person meetings are possible again, in-person STFs will restart. Going forward, STFs will alternate between in-person and virtual.</td>
</tr>
<tr>
<td>3. Which channel do you consider most successful and why?</td>
<td>• As in previous years, the bi-weekly Cloud Forums are an efficient way to reach those that are already engaged with the topic (NREN cloud managers and other NREN representatives).</td>
<td>• Each service has got their own dissemination channels, which are effective.</td>
<td>• Possibilities to communicate with users directly, face to face. This gives an opportunity to understand the exact needs and position, thus being able to better understand if any of our work could be of use, if any modifications are needed, or why something might not be of interest.</td>
<td>The CTO workshop organised in 2021 was very successful and we plan to run this every year. There is one planned to be held in November 2022.</td>
<td>The Security day gives a focus; do have trouble with organising this.</td>
<td>STF, APM mailing list, direct mail (via Partner Relations or direct to service management).</td>
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### Questions

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<th>Questions</th>
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<tr>
<td>For some of the cloud services, we do see a gap between the enthusiastic end-user communities and the NREN/institution representatives whom we rely on to act as communication multipliers in-country. Not all NRENs and their immediate institutional stakeholders in IT see eye to eye on the opportunities around cloud.</td>
<td>quite labour intensive.</td>
<td></td>
<td>• A good example is the perfSONAR user workshops, where developers and users gather over a couple of days to discuss how the tool is being used, upcoming new features and to share feedback and requirements.</td>
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</table>
| From the T&I perspective, it is not very clear to us what the plans of Partner Relations are and what is needed on our side. Some gaps have been identified in relation to the Compendium; some of the questions asked about T&I services are outdated and they have been revisited. Partner Relations also run a customer satisfaction survey; we |  |  |  | • Yes, towards NREN end institutions and end users.  
• This is particularly important for tools such as WiFiMon and NMaaS which are of most value to end institutions rather than NRENs. |  |  |
| Engaging with technical teams, SOC and DDoSC teams. |  |  |  |  | • Software teams for T2.  
• Individual NREN contacts that are less engaged. |  |  |

4. Any engagement gaps?

- Yes, towards NREN end institutions and end users.
- This is particularly important for tools such as WiFiMon and NMaaS which are of most value to end institutions rather than NRENs.
<table>
<thead>
<tr>
<th>Questions</th>
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<tr>
<td>discovered that some of the questions in that survey are outdated. It would make sense for PR to engage with the T&amp;I team to revisit the questions before the next survey.</td>
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<tr>
<td>5. Any lessons learned?</td>
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<td></td>
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<tr>
<td>Refocus on clear and consistent human communication, digital and in-person. Balance efforts spent on some overly technology-driven activities.</td>
<td></td>
<td>Unsure.</td>
<td></td>
<td>All dissemination activities are useful, and we should use any possible opportunity to present our work and engage with our users.</td>
<td>No.</td>
<td>No.</td>
</tr>
</tbody>
</table>
| 6. Do you consider the dedicated person in the Partner Relations team to support you with stakeholder engagement as beneficial? | Absolutely! | Yes, it has been beneficial – it is important to note that the benefits are not only related to fact of having a dedicated person, but also because this person has some understanding as well. |     | • As the PR team has key account managers for NRENs, it looks like we need to work with the whole PR team, rather than just with 1 dedicated person.  
• Bi-weekly calls to exchange information about WP3 and | Yes, very helpful. | Yes, very beneficial. | Interactions with Partner Relations work well. |
## Appendix B Annual Review – GN4-3 Stakeholder Engagement WP Feedback

### Questions

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<tr>
<td>7. What is your one big challenge when reaching out to NRENs/stakeholders that would make your life easier if resolved?</td>
<td></td>
<td></td>
<td>WP6 activities look helpful and promising.</td>
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<td></td>
<td>In some circles entrenched ideological and subjective positions on “Sovereignty”, “Data Protection”, “Openness” being used as K.O. arguments for or against certain technological options. This limits innovation potential and future-proofing.</td>
<td>I think we need to distinguish between the engagement with the NRENs and the rest of the stakeholders as the latter is very different for each service. In what concerns the NRENs, it would be useful to know what meetings are planned and what is presented to the NRENs. We often do not have this information.</td>
<td>• We do not have challenges with reaching out to NRENs. • We have challenges reaching out to NREN end institutions and users.</td>
<td>n/a</td>
<td>Security is a fast-moving business with a lot of initiatives and developments in the NRENs. Would like to have better view of what the NRENs are doing and who are the right contact persons. An annual update meeting with each specific lead on security would be helpful.</td>
<td>n/a</td>
</tr>
<tr>
<td>8. Anything specific that WP3 (Partner Relations, Research Engagement, Insights, Community Programme) should provide support with looking ahead to GN5-1?</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>See answer to previous question.</td>
<td>Nothing at the time of writing.</td>
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<td></td>
<td>• Continue valuable support for comms with the GÉANT community through infoshares, SEE Forum, CTO, etc. • Possibly assist with facilitating the WP4 strategy</td>
<td>If possible it would be useful to have NRENs engagement analysis to identify what needs more attention and define targeted campaigns. Please also note that each service/WP also has links to people in the</td>
<td>• It would be useful to get more support from NRENs in promoting our work in their environment. WP6 can help with providing material (in case NRENs want to</td>
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**Milestone M3.7 (M70)**
**Stakeholder Engagement Plan Y4 Update**
**Document ID: GN4-3-22-8B2EB5**
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<th>Questions</th>
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<tr>
<td>task’s NREN and GA engagement efforts.</td>
<td></td>
<td>NRENs with whom they engage.</td>
<td>present themselves), give presentations, organise 1-1 meetings for more information or to provide support... or some other way that is seen as beneficial by NRENs and their organisations.</td>
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<tr>
<td>• Assist with community communications for eduMEET spinout.</td>
<td></td>
<td></td>
<td>• WP6 could also always use more marketing support to produce material, videos, etc., to help promote services; the OAV and WiFiMon videos were good, but we could have used videos for RARE, GP4L, TimeMap, etc.</td>
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### Questions

9. Looking ahead to GN5-1, are you considering any key changes, i.e. stakeholders, activities or priorities or engagement topics?

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<th>Questions</th>
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<tbody>
<tr>
<td>• Setting up a dedicated strategy task on digital services, to develop and refine options for future opportunities and priorities for the NREN community.</td>
<td>For GN5 it would be good if we could establish a two-way channel. Now it is mostly the T&amp;I team that provides information to Marcomms, Partner Relations, etc. Our main goal is not so much to get help to sell the services, but to get insight on what NRENs need for them to understand the value of what we do. We do realise that most of the managers in the NRENs are network people; it would be important to highlight the need to have other people involved in the NRENs when you talk to them about topics that go beyond the network. As a last note, it would be good for Marcomms, PR, etc. to develop a</td>
<td>• The plan is to continue with as many dissemination activities as possible.</td>
<td>• As under #8, it would be good to work more with NRENs to start promoting WP6 work in their environment. We could benefit from WP3 help to set this up.</td>
<td>No key changes.</td>
<td>–</td>
<td>No.</td>
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</table>
### Questions

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<th>Questions</th>
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<td>better understanding of the T&amp;I portfolio.</td>
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**Table B.2: Annual stakeholder engagement review – Services WPs feedback**
Appendix C  New Service NREN Engagement and Outreach Plan and Checklist

Service:

Service Owner:  
Product Manager:

1. Short summary of the service.

2. Does the service have any adoption KPIs that need to be met? (Product Manager)

3. Have any outreach or co-creation activities been carried out during the development phase?  
   If yes to Q3 then complete Q4–8. Otherwise continue with Q9.

4. Is the NREN the target of the service? Is the NREN part of the supply chain?

5. Have any NRENs already expressed interest? (Documented before start of development, through co-creation activities, Partner Relations activities, presentations or other outreach activities during development, other.)

6. What is the service adoption process? How can NRENs request the service? Do we track service uptake via the Partner Portal?  
   a. Can Non-EU NRENs adopt the service?  
   b. Is the process different to that for EU NRENs, as described in the answer to the first part of this question?

7. Is the Partner Portal information (and Service Request Form, if needed) prepared and approved?

8. What NREN outreach activities are planned? (Minimum NREN Service Review + infoshare.)  
   a. Are any global outreach activities via GN4-3 WP6 T1 required?

9. Are appropriate slides for NREN Service Reviews in place? (Product Manager?)

10. Is an NREN Feedback and Adoption Tracker set up? (Partner Relations)  
    a. Does it need to include non-EU NRENs?

11. Through which channels will the service be promoted to the public? (WP2) (e.g. website, PMO news ...)

Milestone M3.7 (M70)  
Stakeholder Engagement Plan Y4 Update  
Document ID: GN4-3-22-8B2EB5
12. Short summary of Engagement Plan and expected outcomes.

13. Date to review the above and discuss additional measures/changes.
References

[D1.7] Deliverable D1.7 Period 1 Service Review

[D1.13] Deliverable D1.13 Period 2 Service Review

[D3.1] Deliverable D3.1 Stakeholder Engagement Activity and Plan

[D3.5] Deliverable D3.5 NREN Requirements Commentary

[D3.7] Deliverable D3.7 NREN Satisfaction Survey

[M3.3] Milestone M3.3 Stakeholder Engagement Plan Y2 Update

[M3.4] Milestone M3.4 NREN Survey Distributed, Data Collected and Reporting Website Updated Version 3

[M3.5] Milestone M3.3 Stakeholder Engagement Plan Y3 Update
https://resources.geant.org/wp-content/uploads/2022/02/M3.5_Stakeholder-Engagement-Plan-Y3-Update.pdf

[QNCM] https://wiki.geant.org/display/gn43wp3/Quantum+Strategy+CoordinationGroup [federated login required]

[TF-DLT] https://community.geant.org/tf-dlt/
[TF-eHealth] https://community.geant.org/tf-ehealth/
# Glossary

<table>
<thead>
<tr>
<th>Abbreviation</th>
<th>Full Form</th>
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<tbody>
<tr>
<td>APAN</td>
<td>Asia Pacific Advanced Network</td>
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<tr>
<td>APM</td>
<td>Access Port Manager</td>
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<tr>
<td>BOF</td>
<td>Birds of a feather (a specific type of event session usually as part of conferences)</td>
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<tr>
<td>CEO</td>
<td>Chief Executive Officer</td>
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<tr>
<td>CRM</td>
<td>Customer Relationship Management system</td>
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<tr>
<td>CTO</td>
<td>Chief Technology Office or Officer (depending on organisational set-up)</td>
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<tr>
<td>D</td>
<td>Deliverable</td>
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<tr>
<td>DDoSC</td>
<td>Distributed Denial of Service Centre</td>
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<td>EC</td>
<td>European Commission</td>
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<td>EGI</td>
<td>European Grid Infrastructure</td>
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<td>EOSC</td>
<td>European Open Science Cloud</td>
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<td>F2F</td>
<td>Face to Face</td>
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<td>GA</td>
<td>GÉANT General Assembly</td>
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<td>GP4L</td>
<td>GÉANT P4 Lab</td>
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<tr>
<td>ICRI</td>
<td>International Conference on Research Infrastructures</td>
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<td>KPI</td>
<td>Key Performance Indicator</td>
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<td>M</td>
<td>Milestone</td>
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<td>M</td>
<td>Month</td>
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<tr>
<td>NMaaS</td>
<td>Network Management as a Service</td>
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<td>NREN</td>
<td>National Research and Education Network</td>
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<td>OCRE</td>
<td>Open Clouds for Research Environments</td>
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<td>PAIR</td>
<td>Project Annual Internal Review</td>
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<tr>
<td>R&amp;E</td>
<td>Research and Education</td>
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<td>RARE</td>
<td>Router for Academia, Research and Education</td>
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<td>South East Europe</td>
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<tr>
<td>SIG-ISM</td>
<td>SIG on Information Security Management</td>
</tr>
<tr>
<td>SOC</td>
<td>Security Operations Centre</td>
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<tr>
<td>STF</td>
<td>Service and Technology Forum</td>
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<td>T</td>
<td>Task</td>
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<td>TF</td>
<td>Task Force</td>
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<tr>
<td>TF-DLT</td>
<td>Task Force on Distributed Ledger Technologies</td>
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<tr>
<td>TF-eHealth</td>
<td>Task Force on eHealth</td>
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</tbody>
</table>
Glossary

**TNC**  The Network Conference (annual GÉANT conference)
**WiFiMon**  Wi-Fi Network Monitoring
**WP**  Work Package
**WP1**  Work Package 1 Project Management
**WP1 T4**  WP1 Task 4 Product Lifecycle Management (PLM)
**WP1 T6**  WP1 Task 6 Global Partnerships
**WP2**  Work Package 2 Marketing, Communications and Events
**WP3**  Work Package 3 User and Stakeholder Engagement
**WP3 T1**  WP3 Task 1 Partner Relations and Engagement
**WP3 T2**  WP3 Task 2 Research Engagement
**WP3 T3**  WP3 Task 3 Stakeholder Insights
**WP3 T4**  WP3 Task 4 Community Programme
**WP4**  Work Package 4 Online Services Development and Delivery
**WP5**  Work Package 5 Trust and Identity
**WP6**  Work Package 6 Network Technologies and Services Development
**WP7**  Work Package 7 Network Core Infrastructure and Core Service Evolution and Operations
**WP8**  Work Package 8 Security
**WP9**  Work Package 9 Operations Support
**WPL**  Work Package Leader
**Y**  Year