SHIFT2RAIL JU COMMUNICATION STRATEGY

2017 – 2019

Promoting Shift2Rail Joint Undertaking Activities and Objectives

Introduction

This document sets out the base for a strategic communication paper for the Shift2Rail Joint Undertaking (S2R JU). The Communication Strategy, and the subsequent Communication Annual Work Plans, based on the MAAP and Annual Work Plans, are the hub for the dissemination and promotion of S2R JU mission and activities. Capitalising on the project results, as an instrument to deliver the S2R Programme, communication will relay S2R JU's success stories to its key audiences with an ultimate goal to bring on track and start delivering a new concept of railway for market uptake.

The Shift2Rail Joint Undertaking was established by Council Regulation (EU) n° 642/2014 of 16 June 2014. The S2R JU is a public-private partnership, providing a platform for the key stakeholders of the European rail system to work together with a view to driving innovation in the years to come by implementing a comprehensive and coordinated research and innovation strategy. S2R JU is the first European rail initiative to seek focused research and innovation and market-driven solutions by accelerating the integration of new and advanced technologies into innovative rail product solutions. S2R JU's primary objective is to promote the competitiveness of the European Rail Industry and meet the changing EU transport needs.

S2R JU has set strategic targets and a robust framework in which to meet them. Specifically, the initiative aims to double the capacity of the European rail system, increase its reliability and service quality by 50%, all while halving the lifecycle costs.

Europe 2020 strategy is based on smart, sustainable and inclusive growth. This includes achieving a more competitive and resource-efficient European transport system with a view to addressing major societal issues such as rising traffic demand, congestion, security of energy supply and climate change.

To achieve this, the Commission's 2011 Transport White Paper[1] sets out a number of key goals to strengthen the role of rail in the transport system, given rail's inherent advantages in terms of environmental performance, land use, energy consumption and safety.

The 4th Railway Package[2] aims to remove the remaining barriers to the creation of a single European rail area. The proposed legislation reforms the EU's rail sector by encouraging competition and innovation and cost efficiencies in domestic passenger markets. It would also implement structural and technical reforms. The end-result should be higher levels of safety, interoperability and reliability in the European rail network.

Mission Statement

The S2R JU global mission is to underpin the role of rail in the European transport system and the global competitiveness of European industry by enabling rail, through research and innovation, to play a new, broader role in global transport markets, and achieve a stronger market position.

The S2R JU will do this by contributing to:

- Cutting the life-cycle cost of railway transport by 50%,
- Doubling railway capacity,
- Increasing reliability and punctuality by 50%.

Core Values

The S2R JU task is to prioritise the research and innovation activities set out in the Master Plan[3] throughout and beyond the lifetime of the Joint Undertaking, taking into account the following criteria:

- Improved services for users and customer quality, reduced life-cycle system costs, simplified business processes and enhanced interoperability,
- Business benefits in terms of market uptake in Europe and globally,
- Available resources,
- Proportionality, feasibility and acceptability,

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[1] "Roadmap to a Single European Transport Area - Towards a competitive and resource efficient transport system"
[2] Fourth Railway Package towards creation of a the Single European Transport Area (SERA)

[3] Master Plan adopted by S2R JU Governing Board on 31 March 2015

- Potential for accelerated deployment,
- Value-added of action at EU level,
- Link to ongoing research and innovation activities, in particular to projects funded under previous EU Research Programmes and at MS level,

  and

- Potential synergies with other sectors.

The S2R JU communication shall converge on a new approach to Rail mobility for passengers and goods moving from incremental innovation to "users first in mobility as a service", ensuring an integrated role for the Railway Undertakings, the Infrastructures Managers and the manufacturer to implement disruptive innovation.

To achieve this S2R JU will:

- Apply excellence in all its operations;
- Ensure value for money through delivering market recognized innovative solutions;
- Ensure efficient collaboration between Members and with stakeholders.
- Ensure transparency and corporate governance;
- Adhere to the Financial Rules[4];
- Apply a code of conduct[5] to its Staff and Members;

Current state of play

The Rail sector is facing increasing pressure from competitors, inside the EU from other transport modes, and outside the EU from direct and indirect competitors.

The EU is in a phase of global changes, where citizen's empowerment, climate change, automation, digitalization and market uptake are key to the evolution of our society. Stakeholders' expectations are high, so S2R has to deliver fast, transparent, credible messages, demonstrating value for money solutions. The S2R JU communication strategy is ultimately designed to support to the achievement of the Single European Railway Area, ensuring that the European railway system is undoubtedly attractive and competitive; a leader on the global market. To make S2R a success story, Communications shall

[4] www.shift2rail.org/reference-documents
[5] www.shift2rail.org/reference-documents

seek the full commitment from S2R Members and the other relevant stakeholders, as well as from the S2R staff.

It is indeed crucial that S2R as a "brand" gets widely recognized and promoted in order to maximise endorsement by the decision and policy makers.

Communication Message and Objectives

The key message on which communication shall converge can be summarized as follows:

S2R R&I overall concept focuses on leveraging the basic existing infrastructure deployed in Europe – the rail – combining fully automated national centres managing the network with "artificial intelligence" on trains through high-speed digital communication; trains capable to recognize each other and consequently capable to operate in mix traffic situation for passengers, per sector, and freight.

There are two main communication objectives**:**

1. Raising S2R JU profile

OBJECTIVES	Enforce the vision and goals of S2R JU by demonstrating the advantage of the Public Private Partnership together with the innovation capacity of Railway in order to gain support amongst European and National decision makers and current and potential stakeholders. Ensure that S2R JU's mission is clearly understood by the target audiences.
TARGET GROUPS	European and National decision makers (Parliament, EC, Permanent Representatives, CoR COTER and CoR SEDEC), S2R JU members, other JU's, potential applicants for calls for proposal and new stakeholders, European and national funding bodies, and also forwarder, carrier and the transport sector as well as passenger traffic associations.
FOCUS AREA FOR MESSAGES	- Benefits of the public-private partnership model in the rail sector as an effective way for European intervention to overcome current obstacles and to coordinate R&I activities - Innovation performance and capability of the Railway Sector - Benefits of participation in S2R JU projects - S2R JU funding rules - Benefits of R&I defragmentation - Value for money

	• R&I activities in railway shall be coordinate by the S2R JU.
CHANNELS	• Dedicated Projects' Area on the S2R JU's website • High-level meetings with International, National and European policy-makers; participation to specific events and organisation of info-days. Joint workshops with EU programmes, workshop for regional involvement, meetings with financial actors. • Printed press coverage • Timely updating of the Website with events calendar, projects updating, success stories etc. • Timely use of social media– posting info on Facebook, Twitter relative to S2R projects stages. • of advancement & results, launch of Calls for proposals on website, S2R presence at events, re-tweeting S2R relevant info from JU Members

2. Highlighting the Innovation Programmes technology potential and Project Results – Project Dissemination

OBJECTIVES	Demonstrate the added value of integration of new and advanced technologies into innovative rail –passengers and freight – product solutions in addressing economic, social and environmental concerns of EU citizens.
TARGET GROUPS	Specific audiences will be selected depending on the sub-sector (public transport authorities, environmental bodies, research bodies)
FOCUS AREA FOR MESSAGES	• Projects start • Success of S2R JU demonstration activities • Potential of the technology to address specific societal and environmental challenges • Customer value
CHANNELS	• S2R website as platform for communication of project results • Press releases targeted at specific media globally • Attendance to specific events

	• International & European exhibition organisation to highlight the tangible aspect • Timely use of social media – posting info on Facebook, Twitter relative to launch of Calls for proposals on website, Press Releases etc. • Other channels used by the S2R JU Members in collaboration with them

The communication activities of S2R are targeting the overall Programme and not each specific project. In fact, projects awarded through grant agreements or tenders are only contractual means to implement the Programme and will not be promoted. Their importance stems from the fact that through projects the specific R&I activities are performed. This approach is completely different from previous collaborative performed in different contexts, including the Lighhouse.

Priority Audiences

Following concrete communication objectives, key types of target audiences can be identified, as

- **Governance**
  - ✓ S2R JU Members
  - ✓ European Commission (DG MOVE & DG RTD) as representative of the Union in the Membership but also in its overall role within the Union governance

- **Decision makers:**
  - ✓ Commissioners and High Representatives of the European Commission
  - ✓ Members of the European Parliament ITRE and TRANS Committees
  - ✓ Council of the EU (Transport and Competitiveness) and Member States individually
  - ✓ Transport Programme Committee H2020
  - ✓ Other consultation bodies at different levels

- **Stakeholders:**
  - ✓ Associations: CEN-CENELEC, CER, CLECAT, EIM, EPF, EPITTOLA, ERFA, ETF, ETSI, ETTSA, EURNEX, FEDEC, NB-Rail, SEMAF, UIC, UIP, UIRR, UITP, UNIFE, etc.
  - ✓ Industrial community

- ✓ Scientific Community, i.e. Universities, Research Centres, etc.

- ✓ Other agencies (ERA, GSA, ESA, FCH, other JUs, etc.)

- ✓ European Rail Research Advisory Council (ERRAC)

- **Other policy makers**:

  - ✓ International, EU level, Member States, regional and municipal authorities, councillors and scientific attachés of Permanent Representations to the EU

- **International, European and National environmental & energy and mobility associations, NGOs, etc.**

- **General public, potential applicants and the media**

A S2R JU detailed analysis will be carried out prior to launching specific communication activities to define the target audience in order to ensure a tailor-made approach.

Resources

Under the direction of the Executive Director, S2R JU has one dedicated Communications Officer, coordinating the drawing up, planning and implementation of the S2R JU communication strategy, including

- Prioritisation of actions;

- Updating on-going and future communication initiatives;

- Preparing communication-related items for governing board approval/information

The Communications Officer is interacting closely on planning and coordination with many other stakeholders who are communicating on S2R JU-related issues actions and messages, in particular:

- Local multipliers in the Member States such as States Representative Group reaching out to local stakeholders,

- S2R Members, in particular S2R project coordinators and participants, who will communicate the success of S2R to various audiences,

- European Rail Research Advisory Council (ERRAC) outreach to policy and decision makers within ERRAC.

- European Union Agency for Railways(EUAR)

- the Communication Officers of the Railway sector associations, starting with UNIFE, CER, UIC, etc…

Other S2R JU staff (Programme Managers) will contribute to the communication activities in various ways:

- Providing news from projects for use in communication activities
- Providing technical and strategic expertise
- Promoting S2R JU via presentations
- Identifying speakers for S2R JU events.

The S2R Members should ensure to regularly inform the JU of their participation to different events in order to allow synchronization of messages and the possibility to represent S2R itself.

External communication support

The S2R JU will contract out to external services providing web support, design and proof-reading, event organisation, media reporting and the production of promotional material, as appropriate and may call upon assistance from experts for editorial tasks.

S2R JU & Project dissemination teams

Project dissemination and communication are the vehicle for carrying the S2R Programme forward. Members will be expected to disseminate and communicate project results. S2R will advertise project results, as part of the overall S2R Programme, to demonstrate their added value.

To foster clear and unambiguous communication and messaging continuity, the Communication Officer will work closely with dissemination teams made of a representative from each S2R Innovation Project to streamline communication activities (e.g. releasing a joint press release for a project launch or a key achievement, sharing similar material, and disseminating information linking to the S2R JU website and social media channels).

S2R will provide guidelines to Innovation Project teams for presenting S2R projects at exhibitions, trade events etc. and for uploading of results on the S2R website.

S2R will communicate publishable summaries for projects on the S2R website.

European Commission communication teams

S2R JU will liaise with the EC communication teams ('R&I Family Communications Units, communication representatives from different Directorates, etc.) to foster a strong link and ensure a

two-way exchange of information on the communication activities, as appropriate. The added value of the S2R Programme will be enhanced through this two-way relationship.

In addition, the Communication Officer as well as the other S2R staff contact points with Commission Services will ensure that communication tools available in H2020 and other Programmes would be available for S2R at different level.

Risks

The S2R JU is a small entity and therefore the following risks need to be considered carefully prior to all activities:

1. Budget

2. Manpower

3. Evaluation and understanding of target audiences' needs

4. Perception of added value

5. Migration of the project solutions into concrete applications

6. Commitment to deliver innovative solutions

Impact Assessment of Communication Activities

The communication activities will be monitored and reported regularly to the Executive Director in order to measure impact.

The following KPIs will be used to evaluate actions:

- Website statistics (number of visits per page, per events, documents downloaded, etc.)

- Social media traffic (number of followers, number of impressions on publications, number of 'likes', number of 'shares' and 're-tweets', etc.)

- Press coverage (circulation of each publication, etc.)

- Events (feedback via online surveys for main events).

ANNEX 1 - EVENTS IN 2017

INTERNATIONAL EVENTS

- IRITS, the Fourth International Railway Summit – Paris – 15-17 February 2017
  http://www.irits.org/

- Middle East Rail – Dubai – 7-8 March 2017
  http://www.terrapinn.com/exhibition/middle-east-rail/index.stm

- International Rail Forum and Conference - Prague – 22-24 March 2017
  http://www.conferencealerts.com/show-event?id=174897

- Smart Rail Europe - Amsterdam - 4-5 April 2017
  http://www.smartraileurope.com/

- Stephenson Conference – London - 25-27 April 2017
  http://events.imeche.org/ViewEvent?code=C6344#

- Global Public Transport Summit – Montreal - 15-17 May 2017
  https://uitpsummit.org/

- European Rail Summit 2017, Railway Gazette – Brussels – 07 November 2017
  http://www.railwaygazette.com/europeanrailsummit.html

- Railway Interiors Expo 2017 Conference – Prague – 14-15 November 2017
  http://www.railwayinteriors-expo.com/index.php

INSTITUTIONAL EVENTS

- EU industry day – Brusssels – 28 February 2017
- EU Agencies Head of Communication meeting – Parma – 28-29 March 2017
- EC Transport Information Day – Brussels September 2017
- Joint JU EP event – Strasbourg - 23 -26 October 2017
- Digital Transport Days – Tallinn – 9-10 November 2017
- 9th European Innovation Summit – Brussels – 27 November 2017
- S2R event during the Bulgarian Presidency (July – December 2017)
- S2R Info Day – Brussels – 12 December 2017

MEMBERS AND OTHER BODIES EVENTS

- Communication contact points to inform the S2R JU Communication Officer on relevant events.
- A number of regional Information Days for the Open Call and Regional B2B Info-Days are organised throughout the year.

S2R JU EVENTS

- Shift2Rail Open Call for Proposals Information Day for non-Members – 17 January 2017
- Rail Forum Breakfast meeting – 05 May 2017
- Shift2Rail joint JU info day at the European Parliament – October 2017
- Shift2Rail Open Call for Proposals Information Day – December 2017

BEYOND 2017

- IRITS, the Sixth International Railway Summit – Prague – 21-23 February 2018
  http://www.irits.org/

- Transport Research Area (TRA) congress, A Digital Era for Transport - Vienna - 16-19 April 2018 + S2R Prize Awards
  http://www.smart-mobility.at/en/tra2018/

- InnoTrans - Berlin - 18-21 September 2018
  http://www.innotrans.de/

- 12th World Congress on Railway Research (WCRR) - Tokyo - 28 October -1st November 2019
  http://www.wcrr2019.org/

- SIFER – Lille – March 2019

ANNEX 2 - COMMUNICATION YEARLY PLAN – TEMPLATE

Introduction

Setting up of the action lines for the year.

Tactical Objectives

The tactical objectives are more specific objectives suitable for more explicit and detailed implementation, audiences, targets/goals. The objectives should be defined in line with the directions defined in the strategy.

Key Audiences

Specific audiences to be detailed in line with the tactical objectives.

Channels

Setting out which main tools will be used and how they will be employed in line with the tactical objectives and audiences.

Highlights

Define key tools to be developed and additional communication activities (publications, promotional tools, etc.)

Key Performance Indicators (KPIs)

KPIs to be defined prior to each activity.

Annual Events Calendar

Seeking active representation at key relevant events.

ANNEX 3 - GENERAL TERMS & CONDITIONS FOR THE USE OF THE SHIFT2RAIL TRADEMARK AND LOGO

GENERAL TERMS AND CONDITIONS FOR USE OF THE SHIFT2RAIL JOINT UNDERTAKING TRADEMARK AND LOGO

I.   Introduction

Shift2Rail Joint Undertaking (S2R JU) cooperates with external organisations and the need to use the S2R JU logo by third parties frequently arises. The logo of S2R JU is a protected trademark owned by ………………………….. Cases of abuse and fraudulent use of the logo will be subject to the legal proceedings of the Union.

II.   Terms and conditions of use

The logo of S2R JU may be used by third parties subject to the following terms and conditions:

S2R JU logo may be used only if:

- Permission is requested and granted before the logo is used;
- There is no likelihood of the user of the logo being confused with S2R JU;
- It is not used in connection with objectives or activities which are incompatible with the aims and principles of S2R JU;
- It is not used to imply or suggest unintended endorsement or promotion of the objectives and activities of the user of the logo by S2R JU.

The logo shall be used in its entirety without distorting, modifying or separating its component elements. Permission to use the S2R JU logo does not confer on those to whom it is granted any right of exclusive use, nor does it allow them to appropriate the logo, either by registration or any other means. Each case will be examined individually to ascertain whether it satisfies the criteria set out above. This will be unlikely in a commercial context if the logo of S2R JU is used in conjunction with a company's own logo, name or trade mark.

III.   Request for permission to use the S2R JU logo

Request for permission should be submitted to the S2R JU by e-mail: info@shift2rail.europa.eu

IV.   Downloading the S2R JU logo

Third parties can download copy and store the S2R JU logo in all its formats and versions from the Visual Identity Resource page of S2R JU's website. (URL: http://www.shift2rail.org)

V.   Graphical placement of the S2R JU logo

The logo of S2R JU must be visible in its entirety and placed on a background which does not compromise its integrity. The logo is unalterable and inseparable in all its component elements. Modifying the logo in any way is strictly prohibited. For reasons of integrity and visibility, it should always be surrounded by a clear space, or "protection area", which no other element (text, image, drawing, figure...) can infringe upon.

Placing the logo on a background which contains texture or graphical elements such as lines, shades, etc. can only be permitted if the visibility and integrity of the logo is not compromised and the protection area is respected. If the background would distort or interfere with the logo, the protection area around the logo should be white or marked with a flat colour.

VI.   Use of the S2R JU logo by partner organisations for Co-branding

Co-branding shall be used for products and activities in which S2R JU is involved as equal partner. For co-branding with external organisations logos, make sure all logos have equal and balanced visual weight and align them with each other horizontally. The S2R JU logo shall be placed along with the logos of other organisers and it should be proportionately the same size as the size of the logos of other organisations. The protocol order of the logos should be decided in each case as appropriate.