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Guidelines for Super-Labs tools utilisation

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Abstract

This deliverable provides guidelines for Transition Super-Labs (TSLs) supporting tools utilisation. It describes the methodology to evaluate the toolkit in terms of usability, validity and adaptability; it also includes how efficient the selected tools are for achieving the regional transition in terms of governance and decision-making processes as well as about the tool's ability to be adjusted to different future conditions ensuring the resilience and scalability of the solutions. Finally, concrete examples from the project are presented together with the lessons learnt needed for utilizing the toolkit in other contexts.

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Executive Summary

This deliverable presents the comprehensive strategy and guidelines developed to evaluate the TRANSFORMER toolkit created under Task 4.2. The toolkit aims to facilitate the transition towards climate neutrality by supporting Transition Super-Labs (TSLs) with tools that emphasize networking and co-creation during the implementation of the different steps and activities of the TRANSFORMER roadmap. The primary objective of this deliverable is to assess the toolkit in terms of usability, validity, and adaptability, as part of the broader D5.1 Framework for Super-Labs Assessment. This framework ensures that TSLs can effectively align their activities with transition goals, enhance their ecosystem's transition readiness, and continuously self-assess their progress in achieving the transition towards climate neutrality.

The deliverable outlines a tailored methodology to evaluate the toolkit and discusses the efficacy of selected tools in facilitating regional transitions, focusing on governance and decision-making processes. Concrete examples from the project's implementation are provided to illustrate successful applications and areas for improvement. Although the statistical significance of some results was limited due to low participation, valuable insights were gained. The deliverable also emphasizes the need for improved marketing strategies and follow-up actions to enhance the effectiveness of the toolkit.

Overall, the document provides a robust set of guidelines for evaluating the TRANSFORMER toolkit, aiming to support regions in their transition towards climate neutrality. By incorporating lessons learned and best practices, it offers a pathway to enhance the toolkit's impact and usability. Despite some limitations in data significance, the recommendations provided will help mitigate risks and improve future evaluations.

Chapter 1: Introduction

The main objective of Task 5.3 *Tools and structures assessment* is to deliver a strategy to evaluate the toolkit developed in Task 4.2 (see full details in D4.3 *Toolkit for Transition Super-Labs implementation*) in terms of three main pillars: usability, validity and adaptability. This strategy becomes part of the complete assessment process that it is included in the D5.1 *Framework for Super-Labs Assessment*, which presents a holistic Assessment Framework to facilitate TSLs to accelerate the transition towards climate neutrality.

The challenge associated with proposing guidelines for evaluation of the toolkit was the nature of the toolkit itself. The toolkit developed within the TRANSFORMER project consists of "networking" and "co-creation" tools which required to develop a tailored methodology. Within the toolkit a matchmaking platform is included which can be evaluated in a more standard way[1] (e.g. user interface, accuracy of the matching proposed, customization, etc.) while for events or co-creation tools parameters such as flexibility, level of interaction, etc. need to be taken in consideration.

Task 5.3 *Tools and structures assessment* is directly linked and enriched by the implementation of the Pilot use cases[2] in WP3. The contribution of the tools in the transition completion leads to the identification of successful aspects during their use that nurture the development and provision of the guidelines for TSL supporting tools utilisation (linked to Task 4.2 *Development of Transition Super-Lab Toolkit*). The direct output of Task 5.3 include: a methodology for the evaluation of the toolkit, how efficient the tools are in supporting the regional transition and the lessons learnt on how to correctly employ the tools.

This deliverable is structured as follows: in Chapter 2 the methodology to evaluate the toolkit in terms of usability, validity and adaptability is presented. Then, it is detailed how efficient the selected tools are for achieving the regional transition in terms of governance and decision-making processes (Chapter 3) and concrete examples coming from the project are discussed (Chapter 4). Finally, the deliverable concludes with the lessons learnt and a summary of the results.

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[1] Li, Guizi. (2022). Analysis on the Factors Affecting the Performance of Platform Based Matchmaking Enterprises. International Business & Economics Studies. 4. p107-115. 10.22158/ibes.v4n4p107.

[2] The definition of the term "Pilot use case" was developed during the first six month of the project and is included in Deliverable 3.2. Pilot use cases are defined as "co-created concrete project ideas to achieve climate neutrality, promote systemic transformation through innovation and be developed and implemented with a focus on a regional transformation. Furthermore, Pilot use cases have the following characteristics:
- They define a goal-oriented set of interactions between different actors;
- They help identify all relevant issues and resources for the development of Transition Super Labs;
- They evaluate the feasibility of these project ideas;
- They are real-life experiments, which serve for the concept development and its implementation in practice" (quoted from Deliverable 3.2, p.9; URL not available yet).

Chapter 2: Methodology

This tools assessment process proposed here falls within the Assessment Framework detailed in *D5.1 Framework for Super-Labs Assessment* which aims at creating a bridge between TSLs requirements and transition goals and provides to TSLs a valuable asset that will enable regions to increase the transition readiness of their ecosystem and perform a continuous self-assessment towards the achievement of their transition objectives. As specified in the Transition Assessment Framework (D5.1), it will guide the TSLs through-out the assessment activities, providing a synopsis of criteria, methods, data analysis tools and data management processes for the evaluation and validation sub-activities.
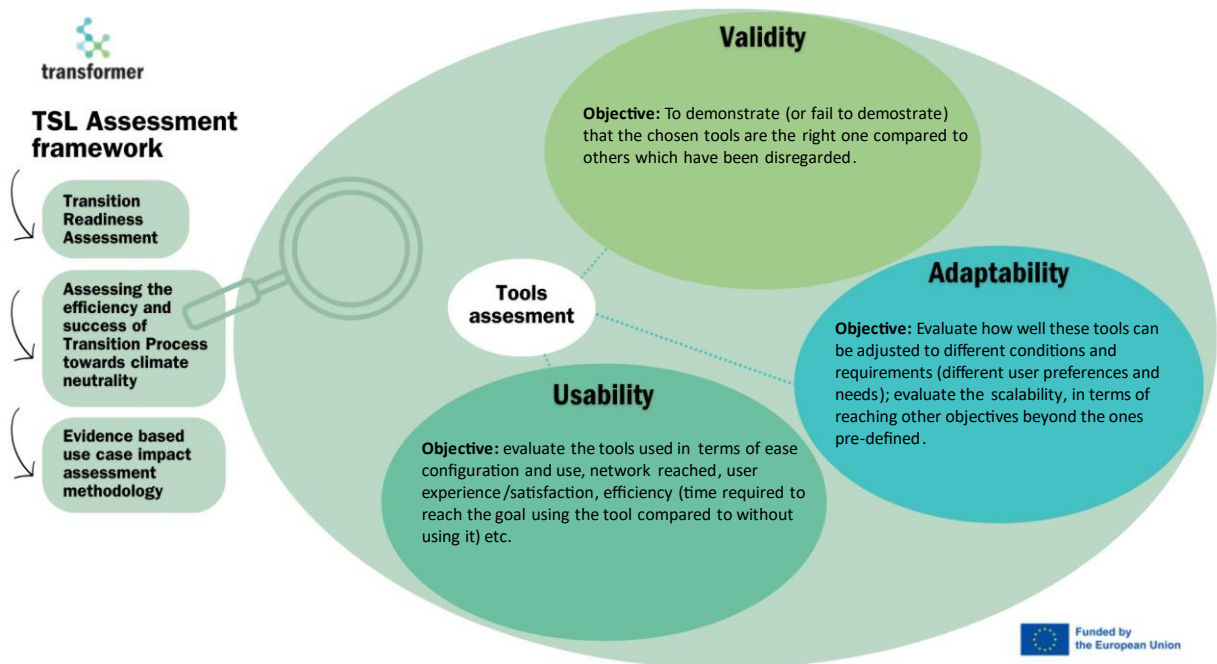

Figure 1 Tools Assessment within the TSL Assessment Framework

The present deliverable focuses on delivering guidelines able to quantify how efficient the selected tools are for achieving the regional transition in terms of governance and decision-making processes as well as about the tools' ability to be adjusted to different future conditions ensuring the resilience and scalability of the solutions. The methodology to be applied when a tool needs to be evaluated is summarized in the flowchart in Figure 2.
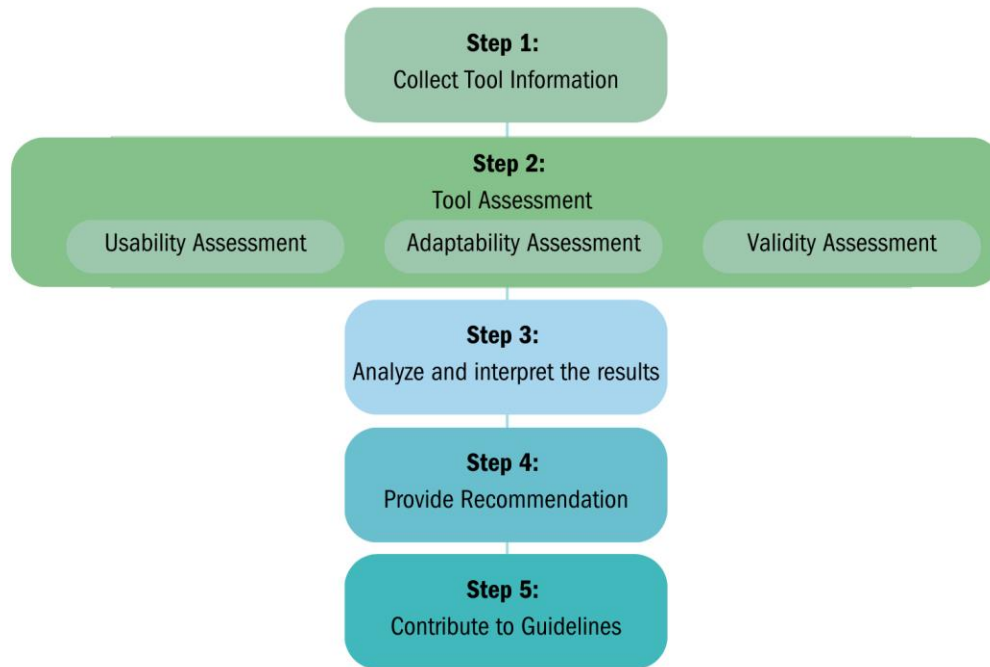
Figure 2 Flowchart for tool evaluation

Step1: The first step is to identify which one is the preferred option among the tools suggested to develop a specific activity (see D4.1 for all the activities included in the TRANSFORMER roadmap and D4.3 for the match between the steps of the roadmap and the type of tools) within a TSL. In order to make the proper choice, it is important to collect as much information as possible about the type of tool. In this regard, D4.3 includes a detailed description for each tool.

Step2: This step includes how a specific tool should be assessed in terms of usability, validity and adaptability. These represent the most crucial steps in the whole evaluation process.

- **Usability**: in order to assess a tool in terms of usability it is important to conduct three sub-steps, namely (i) define usability criteria: these criteria should focus on various aspects of user interaction with the toolkit, such as ease of use, intuitiveness, learnability, efficiency, and user satisfaction; (ii) conduct usability tests and gather user feedback: implement usability testing with a diverse group of users who represent the tool's target audience and collect qualitative and quantitative feedback from users through surveys, interviews, and direct observations (e.g. ask users about their overall experience, specific challenges they faced, and any suggestions for improvement); (iii) analyze ease of use and user satisfaction: based on previous sub-steps identify common issues and areas where users struggled and look for patterns in the feedback that highlight specific

usability problems. Finally, measure user satisfaction using surveys with questions rated on a Likert scale[3].

- **Validity**: in order to assess a tool in terms of validity it is important to conduct four sub-steps, namely (i) define validity criteria: these criteria should assess whether the toolkit produces accurate and reliable results consistent with its intended purpose (e.g. accuracy of data or results produced by the tool, consistency of outcomes); (ii) compare tool performance with benchmarks: this could involve comparing the tool's outputs with those from validated tools. This sub-step helps determine if the tool's results are accurate and trustworthy; (iii) collect user feedback on accuracy and reliability: users should be asked whether the results they obtained using the tool met their expectations; (iv) analyze result consistency: evaluate the consistency of the tool's results across different scenarios and users. Consistent outcomes in varied conditions suggest high validity.

- **Adaptability**: in order to assess a tool in terms of adaptability it is important to conduct four sub-steps, namely (i) define adaptability criteria: these criteria should examine the tool's ability to adjust to different user needs, local characteristics, and technological changes (e.g. scalability, customization options, compatibility with other tools and systems); (ii) evaluate scalability and customization options: simulate different usage scenarios, such as a growing number of users or increased data volume, to assess whether the tool can scale without significant performance degradation; (iii) test flexibility under different conditions: assessing its adaptability to various operating systems, network conditions, and user skill levels; (iv) collect feedback on adaptability: gather feedback from users about their experiences adapting the tool to their specific needs (e.g. how easily they were able to configure and adjust the tool)

Step3: The objective of this step is to compare the proposed tool performance against the defined criteria. This allows to identify strengths and weaknesses of each tool.

Step4: Based on the strengths and weaknesses identified in the previous steps, it is possible in step 4 to suggest improvements and highlight the most successful aspects.

Step5: This final step serves as mean to improve/revise the proposed guidelines and to share findings on tools utilization.

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[3] A Likert scale is a rating scale used to measure survey participants' opinions, attitudes, motivations, and more. It uses a range of answer options ranging from one extreme attitude to another, sometimes including a moderate or neutral option.

Chapter 3: How the identified tools support the regional transition

TSLs, as conceived in the TRANSFORMER project, centre on trans-sectorial transformation at the regional level. TSLs prioritize collaborative governance, systemic transformation, and multi-stakeholder engagement to drive large-scale systemic changes, focusing on climate neutrality and wider sustainability. TSLs stand out for their strategic regional focus and purposeful alignment with cross-sectorial initiatives, thereby offering distinct ecosystems tailored for comprehensive regional transformations towards climate neutrality.

Transitioning regions towards sustainable and resilient futures necessitates the deployment of innovative tools that enhance governance and decision-making processes. This chapter focuses on the two main tools of the toolkit: the Matchmaking tool and the Transitioncamp event. In this chapter, it is outlined how these tools can support the regional transitions, particularly enhancing governance structures and decision-making capabilities, thereby aligning with the broader objectives of the TSLs.

The _Matchmaking tool_ plays an important role in organizing and enhancing networking opportunities for event attendees. This tool supports regional transition by fostering meaningful and sustained interactions before, during, and after events. It improves coordination among stakeholders by enabling them to create personalized profiles and connect based on shared interests and professional backgrounds. This pre-event interaction helps in aligning objectives and setting the stage for collaborative decision-making. By facilitating targeted interactions, the tool ensures that stakeholders can engage in meaningful discussions, thereby enhancing the transparency and accountability of the governance process. Post-event follow-ups supported by the tool extend the collaboration beyond the event, ensuring continuous engagement and the building of robust networks that contribute to effective governance.

The data analytics capabilities of the matchmaking tool provide insights into participant interactions, preferences, and engagement levels. These insights could inform decision-makers about the effectiveness of networking opportunities and help refine future event strategies. The scalability and customization options of the tool ensure that it can be adapted to various contexts, addressing the diverse needs of regional stakeholders and maintaining its effectiveness as the number of users grows. The support for multiple languages further broadens the scope of potential collaborations, making the tool inclusive and adaptable to different linguistic backgrounds.
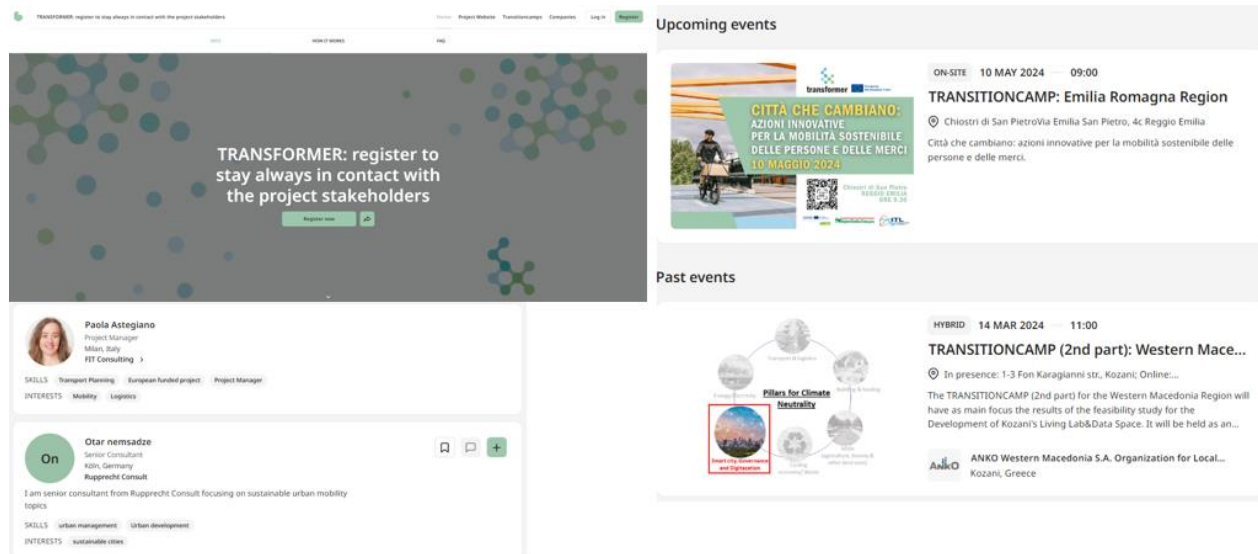
Figure 3 Screenshot of the Matchmaking Platform

The *Transitioncamp* serves as an open day event, bringing together all stakeholders of the Transition Super-Lab (TSL) in a collaborative setting. It supports regional transition by facilitating effective communication and fostering a common understanding of the TSL approach. By conducting the Transitioncamp in the local language, the event ensures that all participants can comfortably engage and express themselves, creating an inclusive environment. This linguistic alignment helps bridge potential language barriers and fosters seamless interactions among stakeholders. The event serves as a platform for stakeholders to gain a comprehensive understanding of the TSL's objectives, scope, and expected outcomes: stakeholders can collectively define the objectives of the TSL, develop a shared vision, and work towards a common purpose. This alignment is crucial for the success of the TSL, as it establishes a foundation of cooperation and collaboration among all involved parties.

In summary, the matchmaking tool and the Transitioncamp event can support regional transitions by enhancing governance and decision-making processes. **The matchmaking tool facilitates targeted, meaningful interactions and sustained engagement, while the Transitioncamp fosters inclusive participation, collaborative decision-making, and continuous improvement.** Together, these tools contribute to providing foundation for achieving sustainable and resilient regional transitions, ensuring that governance structures and decision-making processes are equipped to meet future challenges. By aligning with the principles of just and regional transitions, these tools contribute to the broader goals of the TRANSFORMER project, fostering equitable and sustainable transformations within specific geographic contexts.

Chapter 4: Tangible insights for the evaluation

This chapter has a twofold aim: on one side it aims to provide guidelines on how to evaluate the Matchmaking platform and the Transitioncamp based on the criteria identified in Chapter 2; on the other hand, it will provide a few metrics specific to our TSL that, although not statistically significant, should be considered purely as examples of possible use cases.

Guidelines on how to concretely evaluate the Matchmaking platform

The process to evaluate the usability of the matchmaking platform should start from the identification of the usability criteria. It should continue performing the so-called "usability tests" which aim to test the platform with diverse group of users and observe how they perform. After this phase of observation, users' feedback are collected through surveys and interviews. Finally, the collected information is analyzed to identify common issues and findings with actionable recommendations for enhancing usability.

Usability Criteria examples:

- User Interface Design: How intuitive and user-friendly is the interface?
- Navigation: How easy is it for users to navigate through different sections/modules?
- Task Efficiency: How quickly can users perform key tasks (e.g., creating a profile, searching for matches, sending messages)?
- User Satisfaction: How satisfied are users with their experience?

To evaluate the validity of the platform, after having defined the validity criteria, it would be advisable to compare the platform's matches against selected benchmarks. The latter could be a quite time-consuming task, for this reason it is also feasible to proceed directly collecting the user feedback on accuracy and reliability through surveys about their satisfaction with the matches they receive. To increase the robustness of the results, it would be important to include in the process some experts (e.g. responsible for similar/competitive tools in other project, software providers, etc.) to provide an assessment of the platform's approach and output. The final step consists of analyzing the consistency of the results by conducting repeated test with the same profiles to ensure the platform provides consistent results.

Validity Criteria examples:

- Accuracy: Do the matches reflect user preferences accurately?
- Reliability: Are the results consistent over time for the same inputs?

The evaluation of the adaptability of the platform should start from assessing the performance metrics simulating higher user traffic. Other two key points are represented by (i) the customization and thus check the ease with which users can modify settings and features to suit their needs (ii) the flexibility using for instance different devices or varying network conditions or considering different user skill levels.

Adaptability Criteria examples:

- Scalability: Can the platform handle a growing number of users and data?
- Customization: Can users easily tailor the platform to their specific needs?
- Flexibility: Can the platform adapt to different user scenarios and future requirements?

How to evaluate the Transitioncamp

It is much easier to evaluate Transitioncamp event compared to the Matchmaking Platform. The evaluation could be represented by the collection of input before (to collect participants' expectations), during (to observe interaction and engagement levels) and after the event (to conduct post-event surveys and interview).

Usability Criteria examples:

- Venue: Accessibility, comfort, and facilities.
- Agenda: Clarity, relevance, and pacing of the schedule.
- Registration Process: Ease and efficiency.
- Interaction: Opportunities for engagement and networking.

The validity evaluation should include a phase of pre-event planning and validation to ensure the content of the event is tailored to the audience's needs and that the selected speakers have proven experience with the event topics. Then, as for the usability evaluation, also here a during-event interaction is foreseen to collect feedback contributing to the different criteria.

Validity Criteria examples:

- Content Relevance: Alignment with stakeholders' needs and interests.
- Speaker Expertise: Qualifications and credibility of speakers.
- Session Outcomes: Achievement of learning or engagement objectives.
- Feedback Alignment: Consistency between stakeholder expectations and event outcomes.

The adaptability mainly concerns the ability to be adapted to real-time feedback (e.g. live polls) with which it is possible to gather input from the participants during the event. The idea is to also develop strategies to enhance flexibility and responsiveness for future events.

Adaptability Criteria examples:

- Flexibility of Agenda: Ability to adjust sessions based on real-time feedback.
- Technology Integration: Use of technology to enhance participation and interaction.
- Future Planning: Incorporation of participant suggestions for future events.

TSL: example of results

This paragraph contains some examples of results that can be extracted from the evaluation of the matchmaking platform and the Transitioncamp(s) and that can possibly be the same in other cases.

The Matchmaking platform has been launched publicly at M19 of the project, few days in advance before the first Transitioncamp that has been held in Western Macedonia. Then, it has been promoted every time a Transitioncamp in the different TSLs has been held (see Chapter 5 for lessons learnt on this process). At the end of each Transitioncamp, a questionnaire has been submitted to the participant to collect their feedback about the event itself but also to check their awareness about the matchmaking platform. Table 1 contains the questions prepared for each TSL that were provided in local language; some of the questions are different among the TSLs based on the objectives of the event.

Table 1 Evaluation questionnaire

Western Macedonia	Emilia Romagna	Ruhr Area	Lower Silesia
The objective of today´s event was to discuss and validate with the stakeholders the results of the feasibility studies. Do you think the objective has been reached?	The objective of today´s event was to favour the discussion with the different stakeholders on topic such as sustainable mobility and freight transport. Do you think the objective has been reached?	The objective of today´s event was to involve new civil society stakeholders from the Ruhr Area TSL, showing them the project but also collecting their feedback and opinions. Do you think the objective has been reached?	The objective of today´s event was to strengthen cooperation within TSL, to gain feedback for the implementation of the Action Plan and to stimulate stakeholder group development. Do you think the objective has been reached?
Besides the original objective of the event, do you think the event was useful also for other purposes? • If yes for which one?	Besides the original objective of the event, do you think the event was useful also for other purposes? • If yes for which one?	Besides the main objective of the event, which was to involve new stakeholders from the Ruhr Area TSL, do you think the event was useful also for other purposes? • If yes for which one?	Besides the main objective of the events do you think the event was useful also for other purposes? • If yes for which one?

Western Macedonia	Emilia Romagna	Ruhr Area	Lower Silesia
Did the event meet the expectations set in the communication channels??	Did the event meet the expectations set in the communication channels??	Did the event meet the expectations set in the communication channels? (e.g. email invitation)?	Did the event meet the expectations set in the communication channels? (e.g. email invitation)?
Please rate the overall event based on organization and content	Please rate the overall event based on organization and content	Please rate the overall event based on organization and content	Please rate the overall event based on organization and content
Were you aware of a matchmaking platform of the project? • If yes, did you use it? • If no, now that you know how it works would you suggest to use it before the event to establish new connection?	Were you aware of a matchmaking platform of the project? • If yes, did you use it? • If no, now that you know how it works would you suggest to use it before the event to establish new connection?	During the event, it was presented the matchmaking platform. Would you be interested in using the platform after the event to establish new connection with the partners within/outside the consortium?	During the event, it was presented the matchmaking platform. Would you be interested in using the platform after the event to establish new connection with the partners within/outside the consortium?
Would you be interested in using the platform after the event to establish new connection or to interact with the ones you have already established?	Would you be interested in using the platform after the event to establish new connection or to interact with the ones you have already established?		

Below the results for Western Macedonia and Emilia Romagna Region will be presentedin order to show which possible outcomes could derive from the questionnaire (useful in better understanding the guidelines proposed); however, the results cannot be considered statistically significant given the low participation at the events. For the Ruhr Area and Lower Silesia, unfortunately, there was not an active participation in answering the questionnaire.

The Western Macedonia results have been collected during the event using Mentimeter while the results of the Emilia Romagna Region have been collected after the event using Google form.
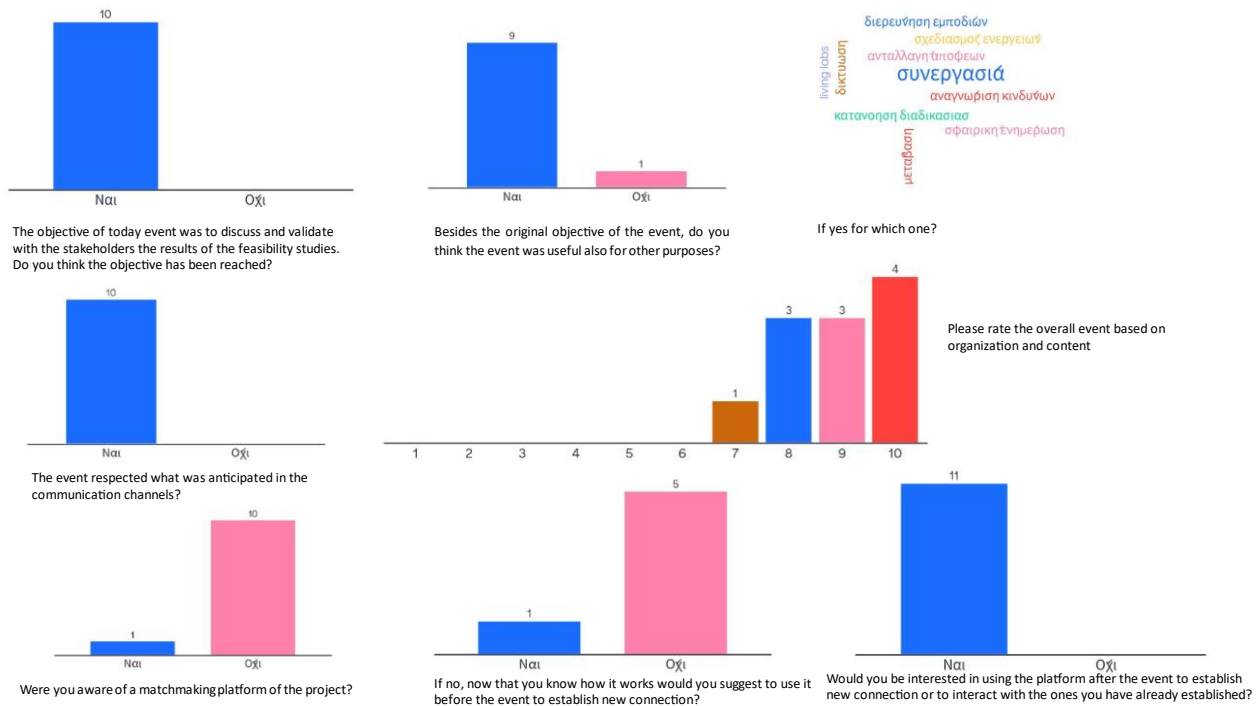

Figure 4 Western Macedonia evaluation results (Ναι = yes, Όχι = no).

The results of the Western Macedonia's Transitioncamp, based on 10 participants, show a positive reaction related with the objectives of the event. Besides its original goal, the event was also mainly useful for (in Greek in the picture) networking, identification of barriers, understanding of the process and risk identification. The Matchmaking platform, which was advertised only few days in advance on the project social channels, wasn't known before the event but, after the presentation during the event, it was recognized as an interesting tool from the audience to establish new connections.
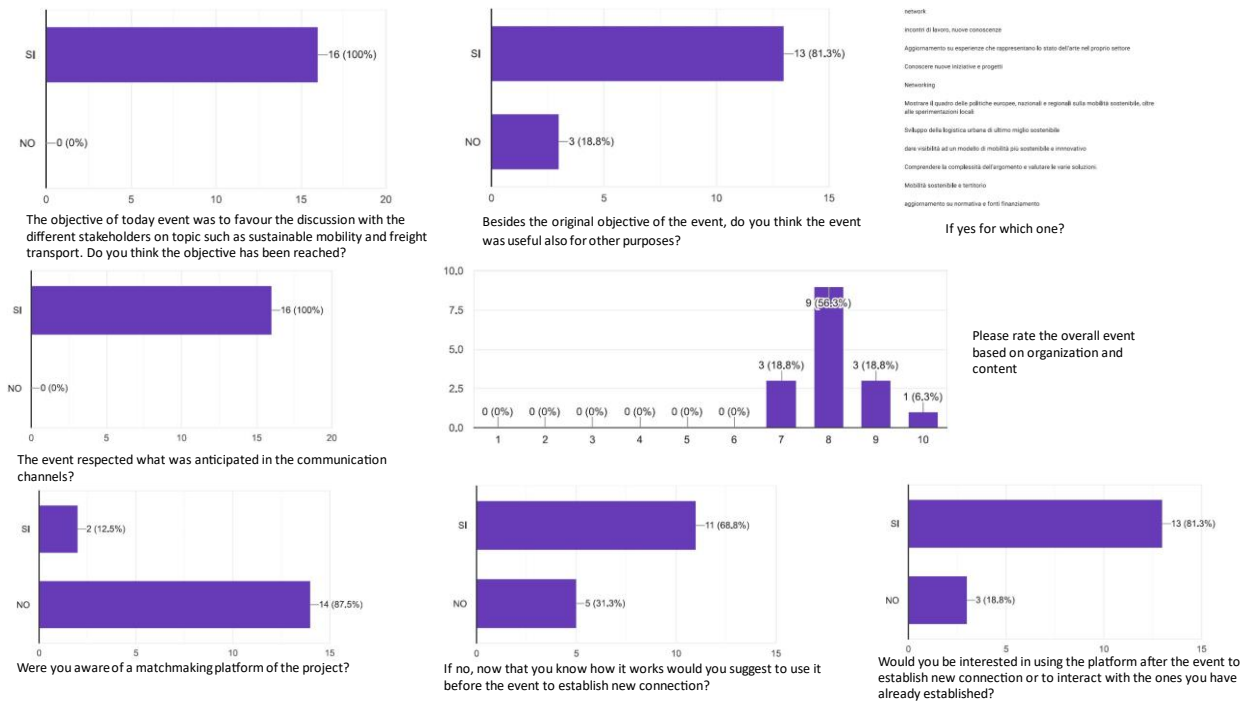
Figure 5 Emilia Romagna evaluation results (Si = yes, No = no).

The results of the Emilia Romagna's Transitioncamp, based on 16 answers out of 30 participants, showed a positive feedback on the overall events, both in terms of objective and organization. Besides the original purpose, the event was also useful for networking, updates on the state of the art in the sector, identifying European policies and strategies for funding. Also in this case, the platform was known only from a couple of people before the event (that registered to it) but the interest was high in the platform.

Even though the results of both Transitioncamps showed interest in trying and utilizing the platform, only a few people decided to concretely register to it after the events.

Regarding the matchmaking platform, several results can be extracted from the tool. However, in the specific case of the project, these results are not statistically significant due to the low amount of people registered. In the next paragraph, the general statistics and summary that can be extracted will be presented, as they may be useful for people intending to use the platform for similar purposes.

Within the b2match platform there is a dedicated tab where it is possible export several types of data:

- Participants data: all data related to participants: profiles, meetings, feedback
- Event summary: Statistics about participants, meetings and meeting ratings
- Attended online sessions: Lists of attendees for each attended online session
- Marketplace: All data related to marketplace opportunities
- Check-in statistics: Number of people checked in for each day and location

- All schedules: Agendas for all participants
- Table schedules: Meetings grouped by day and table
- Timeslot schedules: Meetings grouped by day and timeslot
- Participants catalogue: Participants and Marketplace Opportunities ready for print

In addition, within the dashboard, it is possible to visualize plots and graphs of the registrations and meeting per week.

Chapter 5: Lessons learnt and conclusions

The aim of the current deliverable was to delve into the evaluation of the toolkit developed within the TRANSFORMER project. This is part of the overall framework for assessing Transition Super-Labs (detailed in D5.1) that represents a comprehensive approach to accelerating the shift towards climate neutrality of the regions. The framework emphasizes the importance of a methodological approach that cover the aspects of transition readiness, effectiveness and success of the transition process and evidence-based use case impact assessment.

Chapter 4, which includes the approach tested within the project, showed that there is plenty of space for further improvement in the evaluation. Among the most important precautions to take is the way in which the matchmaking platform is advertised. One of the weakest points was represented by the fact that the platform was advertised on the different project's channels only few days in advance before the events took place. As a result, only few people were aware of its availability. As a second point, even if the platform has been successfully appreciated during all the events, this appreciation didn't bring the expected results (i.e. increase in the number of registrations), thus proper follow-up actions should be planned.

Regarding the Transitioncamp, the most successful were represented by the Emilia Romagna Region and Western Macedonia. The former was able to attract high level politician creating a joint event with another European project on the always sensible topic of sustainable mobility, while the Western Macedonia was able to hold two events thanks to the strong commitment of the stakeholders they managed to attract during the two years of the project. For the Ruhr Area, it was very difficult to attract participants, although an external consultant was explicitly contracted for this purpose. This might due to several reasons: in the region there are many events on the topic of hydrogen, thus it is not always easy to offer something very unique; the target group of civil society is probably the most difficult one to address and to attract to such an event, thus putting in place a dedicated strategy to involve them (e.g. more time sending invitations much earlier, calling people and their respective organisations, etc.) could help. However, the quality of the discussion was high confirming the importance of the topic for this region.

Regarding the type of results that can be extracted, chapter 4 has showed the variety of statistics that can be used to evaluate both the Matchmaking platform and the Transitioncamp in terms of validity, usability

and adaptability. Thus, including mitigation actions described in the previous paragraphs would help in involving a wider sample of participants making the results more significant.

In summary, this deliverable aimed at providing guidelines for toolkit evaluation. Even though it was not able to provide statistically significant results for the tested tools, it provided lessons learned and precautions that should be put in place to decrease the risk of unsuccessful evaluation.