Begonia

D5.2 Stakeholder Platform Guidance Document

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[1]   PU = Public

PP = Restricted to other programme participants (including the Commission Services)

RE = Restricted to a group specified by the consortium (including the Commission Services)

CO = Confidential, only for members of the consortium (including the Commission Services)

Review

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Summary

BEGONIA Project

Europe is embarking on a transformative endeavour to modernise digital information usage, with a focus on enhancing the efficiency, sustainability, and connectivity of our energy and transportation sectors. At the core of this initiative lies the development of advanced Operational Digital Platforms (ODPs) that transcend national boundaries, leveraging state-of-the-art technologies such as data sharing, cloud computing, and network connectivity.

The BEGONIA Project is an EU-funded Coordination and Support Action that aims to expedite this digital transformation in the energy and transport sectors, analysing the most promising solutions and providing information to the European Commission to set up and fund future works project(s).

BEGONIA has the goal of identifying, studying and preparing the development of Operational Digital Platforms (ODPs) across different EU countries, starting from the identification of 10 cross-border and possibly cross-sector (energy and transport) use cases, meticulously shortlisting three based on predefined criteria, and evaluating their impacts through proof-of-concept implementation of their ODPs.

Summary of the Deliverable

Recognizing the critical role of stakeholder engagement in ensuring project success and transparency, the development of an intuitive, interactive digital tool -the BEGONIA platform- has been prioritized. This platform is designed to facilitate stakeholder involvement, interaction, and participation throughout the project's lifecycle while contributing to the general communication and dissemination of the project's results and -in the last phases of the project- supporting the knowledge transfer to the new project that will be funded based on BEGONIA's conclusions.

A comprehensive stakeholder engagement strategy, which will be outlined in Deliverable 5.3, has been established from the start of the project and will be executed to foster collaboration with a wider community of experts and ensure the impartiality of analyses. The platform serves as a key enabler for this strategy, being a hub for connecting experts and stakeholders, gathering feedback, and disseminating project updates and findings.

After research and several discussions with specialists, SharePoint has emerged as the ideal platform to fulfil BEGONIA's requirements due to its simplicity of use and application (also thanks to its integration with Teams) combined with a user-friendly interface and

data security measures. Complementing its capabilities, additional features such as Forms for data collection and Newsfeed for real-time updates will be integrated to enhance the platform's functionality. As a result, the BEGONIA platform will allow more than document storage, serving as a hub for collaboration, event organization, and knowledge dissemination.

The platform's evolution will be flexible in order to respond to the encountered project needs and the feedback of its users. In any case, the BEGONIA platform will foster collaboration, communication, and knowledge exchange to support the projects' goal of driving digital innovation across Europe.

Disclaimer

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Table of Acronyms

Acronyms	Description
CA	Consortium Agreement
EC	European Commission
EU	European Union
ODPs	Operational Digital Platforms
T5.1	Task 5.1
WP(s)	Work Package(s)

List of Figures

1. Introduction

1.1.   BEGONIA Project

The aim of the BEGONIA Project is to expedite the European digital transformation by analysing promising solutions and providing recommendations to the European Commission. Specifically, the project focuses on identifying, studying, and preparing the development of ODPs in the energy and transport sectors across various EU countries, with the goal of facilitating the setup and funding of future projects.

1.2.   Work Package 5

Work Package 5 -Stakeholders' engagement, Dissemination and Knowledge transfer- runs throughout the 27 months of the project and interacts will all other Work Packages (WPs) with multiple objectives.

First of all, Work Package 5 plans and carries out the Communication and Dissemination of BEGONIA. The Communication and Dissemination includes the definition of the project's visual identity to support the internal and external dissemination activities, and the implementation of a series of actions that will facilitate the engagement of the community of experts, including a website platform.

Secondly, this Work Package has the goal of creating a community of experts to gather inputs and feedback, find partners, and feed information to all WPs where necessary. The creation of the stakeholder community allows the gathering of necessary inputs and feedback from experts, industry representatives, and relevant stakeholders in order to feed vital information for the development of all the operative Work Packages (WP2, WP3, and WP4).

Finally, WP5 will carry out a know-how transfer of the projects' conclusions to the Commission for the definition of the new calls for project(s) and, in the final months of the project, to the entities awarded the new project(s), providing information and support in the initial phases.

1.3.   Task 5.1

This deliverable presents the results of activities that have been carried out in the context of a broader Task, namely Task 5.1 (T5.1).

This Task has the purpose of setting up the work of the whole Work Package 5, having several objectives, developed in parallel to ensure consistency:

- Define and implement the project Visual Identity.

- Draft the project Communication and Dissemination plan.

- Define a strategy to approach stakeholders to be included in a community to engage with throughout the project, both to provide feedback and inputs to all work packages and allow more transparency.

- Identify the most relevant stakeholders to be involved.

- Define a strategy to facilitate the know-how transfer of the project conclusions.

- Design and set up the project website and a platform to facilitate the stakeholders' engagement and knowledge transfer.

This short deliverable describes the process and outcomes of the activities carried out to define how to set up and utilize a **platform** that, in parallel to the website, will be used to facilitate the **Stakeholders' engagement** and facilitate the **Communication dissemination** and the **Knowledge transfer** to the new project(s).

2. The platform and its use in BEGONIA

2.1. Context: stakeholder engagement in BEGONIA

The platform, whose structure and features are here presented, has among its main purposes to facilitate the involvement, interaction and participation of the experts and interested parties that will be included in the **stakeholders' community** of the BEGONIA.

From the start of the project, the need to include relevant stakeholders in the activities has been identified as a key aspect of the research activity, since it enhances the possibility of **cooperation**, allows to **gathering of external knowledge and guarantees more impartiality of the analyses**. A network of relevant stakeholders is being created to support the projects' activities, feed information to all WPs and exchange opinions and material.

To this end, a stakeholders' engagement strategy -described in Deliverable 5.3- has been defined from the start of the project and will be implemented throughout its duration.

The importance of stakeholders

What are we looking for

Key contributors able to propose new use case ideas motivated by real needs in the respective sector value chain

Form an expert group to advise the project throughout its lifetime and to provide feedback and validate use cases

What's in it for you

Obtain feedback from experts on your use case ideas

Gain insights into other cutting edge use cases for cross-sector cross-border digital services

Influence European policy, implementation roadmaps and future procurement opportunities for cross-border cross-sector digital platforms

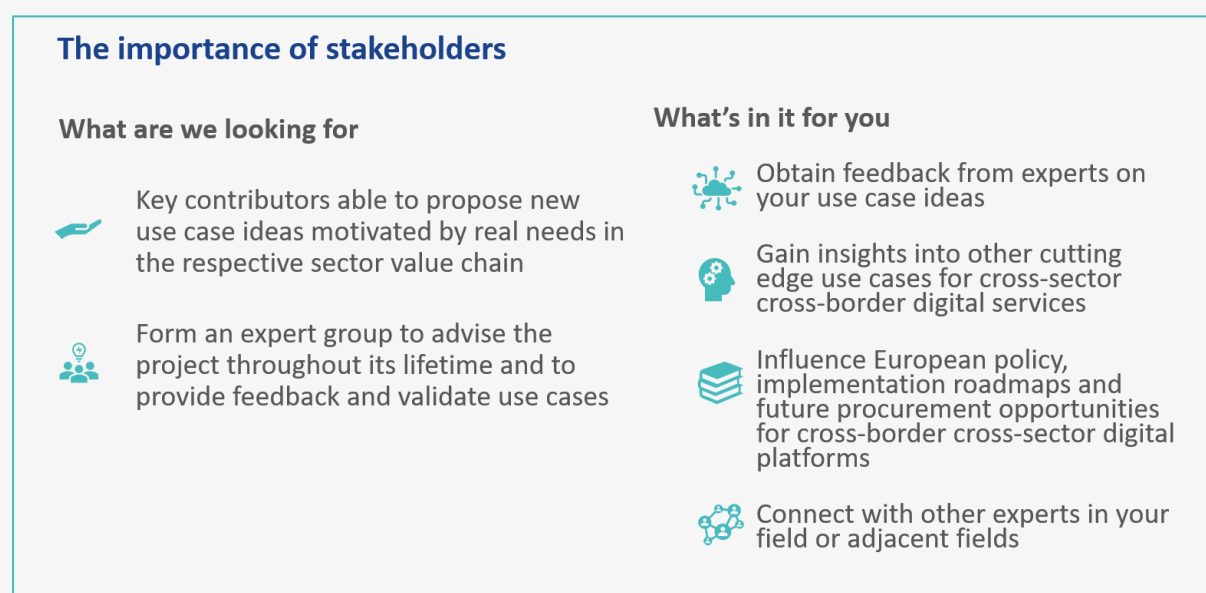Connect with other experts in your field or adjacent fields

Figure 1: The Importance of Stakeholders in Begonia.

In particular, **four main categories of stakeholders** that can be included in the platform can be identified, as indicated in the scheme below.
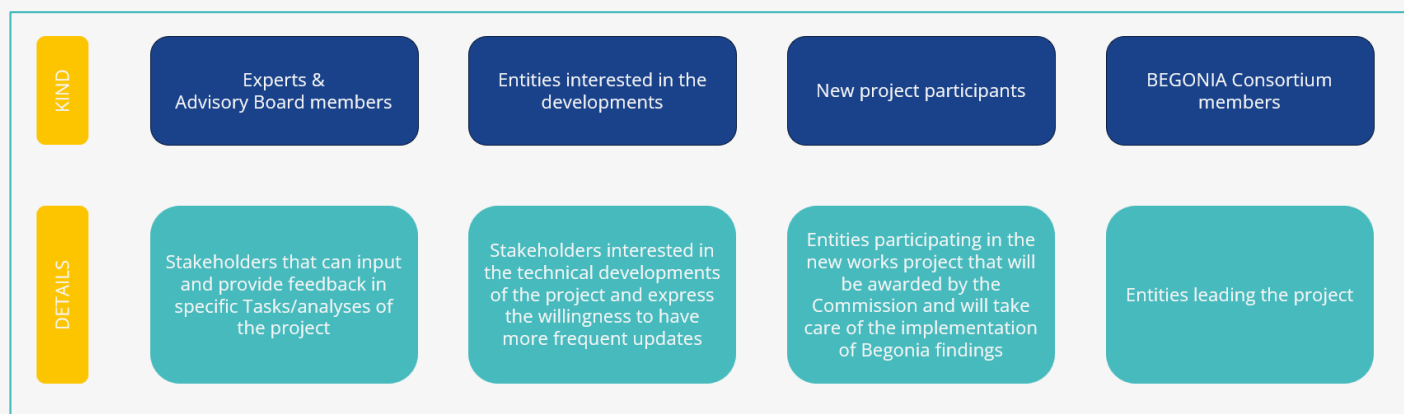
KIND	Experts & Advisory Board members	Entities interested in the developments	New project participants	BEGONIA Consortium members
DETAILS	Stakeholders that can input and provide feedback in specific Tasks/analyses of the project	Stakeholders interested in the technical developments of the project and express the willingness to have more frequent updates	Entities participating in the new works project that will be awarded by the Commission and will take care of the implementation of Begonia findings	Entities leading the project

Figure 2: Stakeholders' categories

2.2.   Why use a Platform

Interaction between stakeholders is essential for the project's success and leveraging a platform offers benefits over traditional methods, among which improved communication, collaboration, and transparency.

Emails, phone calls, and bilateral meetings, if not backed up by other solutions, can lead to fragmented communication and misalignment among stakeholders: discussions may be scattered across various channels, leading to fragmented communication.

A platform allows a more **user-friendly** approach while providing centralized **communication** channels, such as discussion boards and chat features, enabling (when necessary) real-time communication and better alignment. Moreover, stakeholders can access updates, announcements, and discussions, fostering improved communication and collaboration.

Transparency is key to building trust and maintaining accountability among project stakeholders which may be lacking in traditional methods, making it difficult for stakeholders to track progress, access relevant information, or understand the processes. On the other hand, through the platform, stakeholders can easily access project updates, reports, and key milestones.

Furthermore, a platform enables the use of **collaboration** tools and eases the interaction and input provision, which also allows for saving stakeholders time, of particular importance given their limited availability.

Finally, this solution can be used to support the general **Communication and dissemination** of BEGONIA and the **Knowledge transfer** to the new project(s) that will be funded and initiated in the final phases of BEGONIA. Inviting the awarded entities to the platform would allow them easy access to all the relevant documentation and material produced while putting them in contact with the network of stakeholders that will have been built by the end of the project.

2.3. Choice of Platform: SharePoint

SharePoint is a web-based collaborative platform that can be used for building websites for internal and external use. Its advantage is the **quick and easy setup** along with the acceptance and usability, internally and externally, which can allow a successful use as a central tool for engaging relevant target groups**.** Whether the organisation of webinars, surveys, topic-related channels, or individual chats.

SharePoint can be used as a centralized repository for documents, fostering collaboration by allowing participants to store, share, and work on files collectively.

Its integration with **Microsoft Teams** enables seamless access to SharePoint directly within Teams, facilitating real-time collaboration and version control. Teams channels can be linked to specific SharePoint sites or document libraries, offering dedicated spaces for project collaboration.

This integration ensures that relevant documents and discussions are easily accessible within the context of the team's channel. This unified platform also supports various communication tools within Teams, including chat, video conferencing, and audio calls, ensuring that teams can access SharePoint documents and resources directly from their chat conversations or meeting discussions, thus facilitating efficient communication and collaboration.

Deep diving into the details, it is possible to highlight one by one the main features that have been identified as the main advantages regarding the requirements of using SharePoint as a project and stakeholder community platform for BEGONIA:

- Document Management: It is important that SharePoint offers a structured filing option. Due to the rights management, it is possible to grant the various BEGONIA stakeholder groups and internal partners individual access options. Folders and documents can be made directly accessible to the relevant channels (working groups) via Teams.

- <u>Social Features</u>: The social features offered by SharePoint are an elementary component of interactive communication and integration of stakeholders in decision-making processes and project development. Tools such as discussion boards, activity feeds or blogs can contribute to finding solutions efficiently, especially when it comes to sharing ideas and approaches.

- <u>Search Capabilities</u>: By integrating the intelligent SharePoint database and a corresponding content shift, all BEGONIA platform users can search for relevant information in all documents via a high-performance search. SharePoint not only searches document titles but also the complete content of the documents. This saves time by avoiding the generation of duplicate content.

- <u>Mobile Accessibility</u>: The mobile application is a crucial functionality for stakeholders and BEGONIA partners. Due to the expected intensive mobility of our target group, this is a basic requirement.

- <u>Customisation and Branding</u>: The possibility of graphic customisation and design with regard to the BEGONIA project means that the application's high level of adaptability is a must-have. Design and identity ensure trust and security.

As a result, SharePoint and its default integration with Teams fulfil all the requirements and the needs of the aforementioned activities of the BEGONIA project and, where possible, it can continue to be used as a central HUB even after the end of the project. The implementation of the platform is based on **4 elementary requirement sectors:**

1. public access
2. confidential access
3. collaboration
4. communication/dissemination

Concerning the complete fulfilment of these requirements as well as the simple and fast implementation based on the Office 365 solution, **SharePoint and Teams will form the basis of the BEGONIA stakeholder engagement platform.**

2.4.   Characteristics of the platform

Needs of the project

As anticipated, the platform has to answer to multiple needs. First of all and most importantly, it has to facilitate stakeholder engagement and, as a result, act as a doorway to:

- **Connect** experts and other relevant stakeholders (to the project and among themselves).
- Facilitate the provision of **input and feedback** from experts to the project throughout its duration.

Moreover, the platform can also support general Communication and dissemination, and Knowledge transfer, that is:

- **Share projects' findings** to a wider audience and allow access to documents and material.
- Facilitate the **knowledge transfer** and support to the newly funded project that will follow BEGONIA.

Combining these targets with the aforementioned different kinds of stakeholders that can participate in the platform, a combination of tools is deemed necessary.

How can the platform support - Tools

SharePoint allows the creation of Sites and an intranet between the participants that (also relying on the **Teams** interface) will be utilized to enable easy access to information and contacts, ensuring strong communication and interaction between project participants and experts. Some key features that will be exploited for this end in the context of BEGONIA are:

- Possibility to **host bilateral/group meetings** with the relevant stakeholders.
- Creation of **channels and discussion groups**.
- Organization of **webinars, workshops or virtual events** to present the findings to a wider audience.
- Creation of **documents repository**.

This will be helpful during the project but also for the final Knowledge transfer since the new project participants, once awarded, will be invited to all channels to facilitate their contact with the experts as well as access to the documents.

In order to further facilitate the gathering of inputs, additional tools will be used to send questionnaires to the network of stakeholders included in the project, through a **Forms** tool.

Finally, but not less importantly, depending on the development of the stakeholders' engagement strategy and the necessities that will be encountered, tools to guarantee to the Platform users and easily accessible periodic updates on the projects' developments may be integrated. This is planned to be done using **Newsfeed**, a collaborative feature that allows users within an organization to share updates, announcements, and engage in discussions in a social media-like environment.

More details about specific Microsoft tools that will be included in SharePoint -hence in the platform- will be provided in the following section. Nevertheless, a summary of the main features that the platform will offer to meet the different needs is presented in the scheme below.
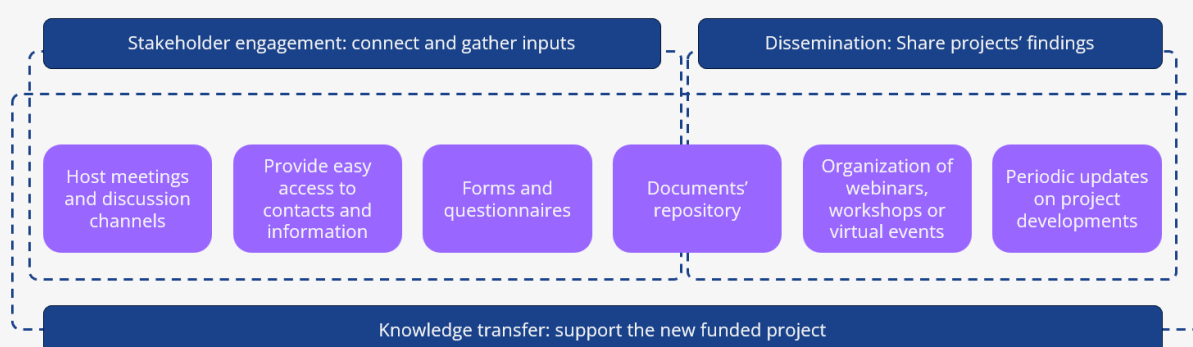

Figure 3: Schematisation of the support features of the Platform (in purple) to the project needs (in blue)

How to access the platform

The platform will be open to external stakeholders and will be included. Experts, advisory board members or other relevant stakeholders pre-identified as relevant for the development of the project in the Stakeholders' engagement strategy will be directly invited to join the platform, as well as the new project participants once awarded. On the other hand, interested parties that are simply willing to follow the developments of the project more closely that reach out to one of the Consortium members or contact BEGONIA through the website will be included, but given access only to the general documents and the newsfeed, unless agreed otherwise.

2.5. Additional details of features utilized in the platform

The functionalities of SharePoint, combined with Teams, already provide a wide array of possibilities that allow to cover the aforementioned 'needs'. Nevertheless, some specific tools will be implemented to enable an even more interactive experience in the use of the platform. In this section, a brief description of their characteristics and use will be provided.

SharePoint Sites

This essential SharePoint feature allows for building and managing websites, creating a dynamic web experience. In the case of BEGONIA, this tool can become the central hub and the basis of the platform. The functionality is one of the most important tools for the engagement of all BEGONIA stakeholders, allowing to build up an interface where to visualise all relevant content -and make it visible even to external users- in one place, integrating customization, content management, and collaboration tools.

Some key characteristics are considered particularly useful for the BEGONIA platform. First of all, SharePoint's diverse site templates, which include team sites and communication sites, simplify the platform creation, providing pre-configured layouts, which reduce complexities and enable a quick visualization of all the pre-stored content.

Secondly, online accessibility allows for parallel collaborative work on documents, saving time and resources. This transparency aids in the development and evaluation of BEGONIA's documents and material (starting from the use cases in the first phase).

Finally, SharePoint ensures mobile responsiveness, displaying content on every end device. This is essential for barrier-free access to BEGONIA's platform.

Forms

In order to quickly gather the opinion of stakeholders and/or other interested parties, questionnaires will be sent during workshops or in periods where the information gathering is necessary for the completion of a Task.

To this end, Microsoft Forms stands out as an interesting asset within the BEGONIA project platform, facilitating the data collection thanks to a user-friendly interface that allows the easy creation of surveys, quizzes, and polls, streamlining the acquisition of insights. In fact, offers an array of pre-designed templates and customization options.

Moreover, it integrates seamlessly with other Office 365 applications (namely SharePoint, and Teams) ensuring compatibility and efficient data sharing among project teams. It has also been selected due to analytics capabilities that allow real-time analysis of response data, leading to informed decision-making, and due to compliance with security standards, which guarantees the protection of any sensitive information. Finally, as SharePoint and all other applications, it ensures mobile accessibility and data collection from any location which is a quite important feature given that the BEGONIA stakeholders will not necessarily have much time available to invest in the input provision.

Newsfeed

The Newsfeed tool can be used as the awareness booster for the BEGONIA project within the Platform and can facilitate a regular "activation" of the stakeholder community, enabling it to stay informed and engaged over the long term.

Similar to push notifications on social media platforms, it provides real-time updates and facilitates interaction through likes, comments, and shares. It also offers search functionality that enhances its efficiency since users can quickly find relevant content. Additionally, if it will be considered necessary in the development of the project, its analytics feature can provide insights into user engagement.

2.6. Integration with the project's website

The development of the platform is subsequent to the creation of the project website, https://www.begonia-project.eu/.

The most important communicative task of both solutions is the intelligent fusion for barrier-free use by visitors. It is therefore important to define the two different tasks of the two solutions.

While the **website is the calling business card of the project and can be viewed by everyone,** the **platform** must fulfil various requirements and ensure **use by the interested parties**, with the characteristics presented in the sections above.

The website serves to increase awareness and allow for initial contact for a wide range of interested parties as well as potential stakeholders that can be interested in the project, also to eventually be included in the platform as stakeholders participating in the project.

Conceptually, public content and relevant findings will have easy access from the website, thus creating the desired and necessary transparency. This will be the case also for relevant documents such as deliverables and communication materials.

On the other hand, the platform will be the more dynamic and interactive tool that has been described in the sections above.
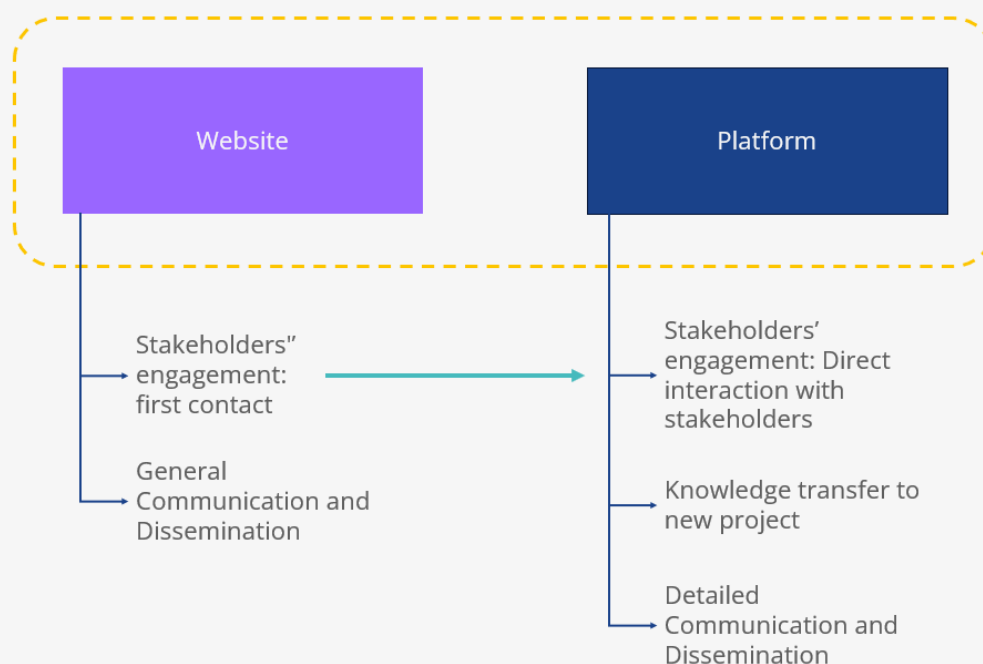

Figure 4: Simplified scheme of the integration and purpose of Platform and Website

2.7. Platform Implementation and Administration

The platform is based on the Microsoft 365 software cloud solution. To ensure an efficient and sustainable implementation of the BEGONIA platform, a new Office 365 Business Standard instance for the project is planned to be set up and equipped with all the necessary features.

This approach makes it possible to align the platform 100% with the project in terms of appearance and content, besides guaranteeing an easy use of the platform and its content beyond the duration of the project. Individual IT requirements of the project partner institutions are no longer necessary.

The administration, adaptation and modification of content and customisation of the design are not subject to lengthy approval processes and can be implemented independently and directly by those responsible for the BEGONIA platform.

The platform is planned to be set up and functional by the fifth month of the Project, in line with the timings of the Stakeholders' engagement plan and the necessity to gather the first experts' inputs for the WP2 Use Cases. Specific functionalities and features might be added at a later stage and respond to the project's necessities.

3. Conclusions

The BEGONIA Project aims to accelerate the digital transformation in Europe by analysing and recommending solutions to the European Commission, specifically focusing on Operational Digital Platforms.

Facilitating the participation of a broad range of stakeholders is crucial for project success and transparency. To achieve this, a simple, intuitive, and interactive digital tool is essential. Hence, a dedicated BEGONIA platform, separate yet connected to the BEGONIA website, is being developed.

This platform will fulfil the main project needs, primarily serving as a facilitator for stakeholder engagement, connecting experts and relevant stakeholders, and enabling input and feedback provision throughout the project's duration. Additionally, the platform will support general communication, dissemination, and knowledge transfer by sharing project findings, granting access to documents and materials, and facilitating knowledge transfer to subsequent projects following BEGONIA.

After research and several discussions with experts, SharePoint has been identified as the appropriate tool to meet BEGONIA's specific requirements, ensuring easy accessibility, data protection, and interaction. Various additional features, including Forms and potentially Newsfeed, will be incorporated into the platform. Acting as the central hub, it will facilitate discussions among stakeholders, serve as a document repository, organize webinars and virtual events, gather information through meetings, facilitate collaboration on documents, share questionnaires, and provide periodic updates on project developments.

Starting from these considerations and expectations, once implemented, the management and utilization of the platform will be adapted to the needs that will be encountered and to the feedback of its users so changes and adaptations might be expected. In any case, the platform will be a comprehensive solution tailored to BEGONIA's requirements, enhancing collaboration, communication, and knowledge transfer.