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**Reporting for the elaboration of a learning process methodology**

Semester 1\_Activity 1: Elaboration of the overall project learning process methodology

Developed by PP6 Grand E-Nov+

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# Executive summary

Developing a customized learning action plan for enhancing the availability, use, and processing of open data in various European territories requires a strategic and adaptable approach. This deliverable is thought to be a methodology to enable each project partner to create a tailored plan that considers the unique characteristics of its region while accommodating different levels of skill maturity and change readiness of its stakeholders. This methodology is based on several steps that will be detailed in this report:

**1. Needs Assessment:** Begin by conducting a comprehensive needs assessment in each territory. This should involve engaging with key stakeholders including government bodies, businesses, academia, and civil society. Identify the specific challenges, opportunities, and existing capabilities related to open data availability, use, and processing. This assessment will form the foundation of the learning action plan.

**2. Stakeholder Mapping:** Create a detailed map of stakeholders in each territory. Understand their roles, interests, and their level of engagement with open data. This will help in tailoring the learning actions to specific stakeholder needs and expectations.

**3. Maturity Assessment:** Assess the current maturity level of skills, infrastructure, and resources related to open data in each territory. This assessment will allow you to categorize territories based on their readiness for change. For instance, classify them into levels like beginners, intermediate, and advanced.

**4. Customized Learning Paths:** Based on the maturity assessment, design customized learning paths for each category of territories. Beginners might need foundational training on open data concepts, while intermediate and advanced territories can focus on more specialized topics such as data governance, quality assurance, and advanced analytics.

**5. Modular Learning Content:** Develop modular learning content that can be adapted and combined to meet the specific needs of each territory. This could include online courses, workshops, webinars, and downloadable resources. Ensure that the content is designed to cater to different learning styles and preferences.

**6. Flexible Delivery Modes:** Recognize that different territories might prefer different delivery modes based on their local context. Some might prefer in-person workshops, while others might benefit more from virtual sessions. Make the learning resources available through multiple channels to accommodate diverse preferences.

**7. Peer Learning and Collaboration:** Promote peer learning and collaboration between different territories. Establish a platform or network where project partners can share their experiences, challenges, and solutions. This cross-territory interaction can facilitate mutual learning and the exchange of best practices.

**8. Change Management Strategies:** Acknowledge that people's posture towards change can vary. Some might be more resistant to change, while others are more open and proactive. Incorporate change management strategies into the learning action plan to address resistance and encourage a positive attitude towards innovation.

**9. Continuous Feedback Loop:** Implement a continuous feedback loop mechanism where project partners regularly assess the effectiveness of the learning action plan. This allows for timely adjustments and improvements based on the evolving needs and dynamics of each territory.

**10. Monitoring and Evaluation:** Define clear key performance indicators (KPIs) to measure the success of the learning action plan in each territory. Regularly monitor and evaluate the progress against these KPIs to ensure that the plan is delivering the intended outcomes.

The key to success in innovation management is flexibility and adaptability. Following this general method, each regional partner should be prepared to adjust and tailor the project learning approach further as they gather more insights and experiences from implementing the learning action plan across diverse European territories.

# The European Open Data context and the methodical support required

# An encouraging European policy context targeting the publication of open data

The European Commission's digital strategy on open data[[1]](#footnote-2) sets a promising policy context that encourages the publication of open data across Europe, aligning with the goals of OD4growth project. The strategy emphasizes several key points:

1. **Open Data Mandate:** The European Commission underscores its commitment to fostering a data-driven economy by advocating for the release of public sector data as open data. This mandate reflects a strong push towards transparency and accessibility of government data.
2. **Access and Reuse:** The policy highlights the importance of making open data easily accessible and reusable for both the public and private sectors. This aligns well with our project's aim of improving the availability and use of open data across European territories.
3. **Collaboration and Sharing:** The strategy encourages collaboration and data sharing among EU member states, ensuring that open data initiatives transcend national borders. This collaborative approach resonates with our project's goal of tailoring learning actions to individual territories while promoting cross-territory sharing of best practices.
4. **Stimulating Innovation:** The policy recognizes the potential of open data to drive innovation, economic growth, and job creation. This acknowledgement reinforces the positive impact that our project's learning actions can have on improving open data capacity and driving innovation in various territories.
5. **High-Value Datasets:** The strategy focuses on releasing high-value datasets, prioritizing datasets with significant potential for economic and societal impact. This approach aligns with our project's emphasis on identifying good practices and organizations with improved open data capacity.
6. **Policy Coherence:** The European Commission commits to ensuring policy coherence across various sectors and policy initiatives, aiming to create an environment conducive to open data adoption. This coherence aligns with our project's focus on improving policy instruments related to open data.
7. **Empowering Citizens and Businesses:** The strategy underscores the importance of empowering citizens and businesses with open data, enabling them to make informed decisions and create value-added services. This empowerment mirrors the outcomes our project seeks to achieve by enhancing open data availability and processing.

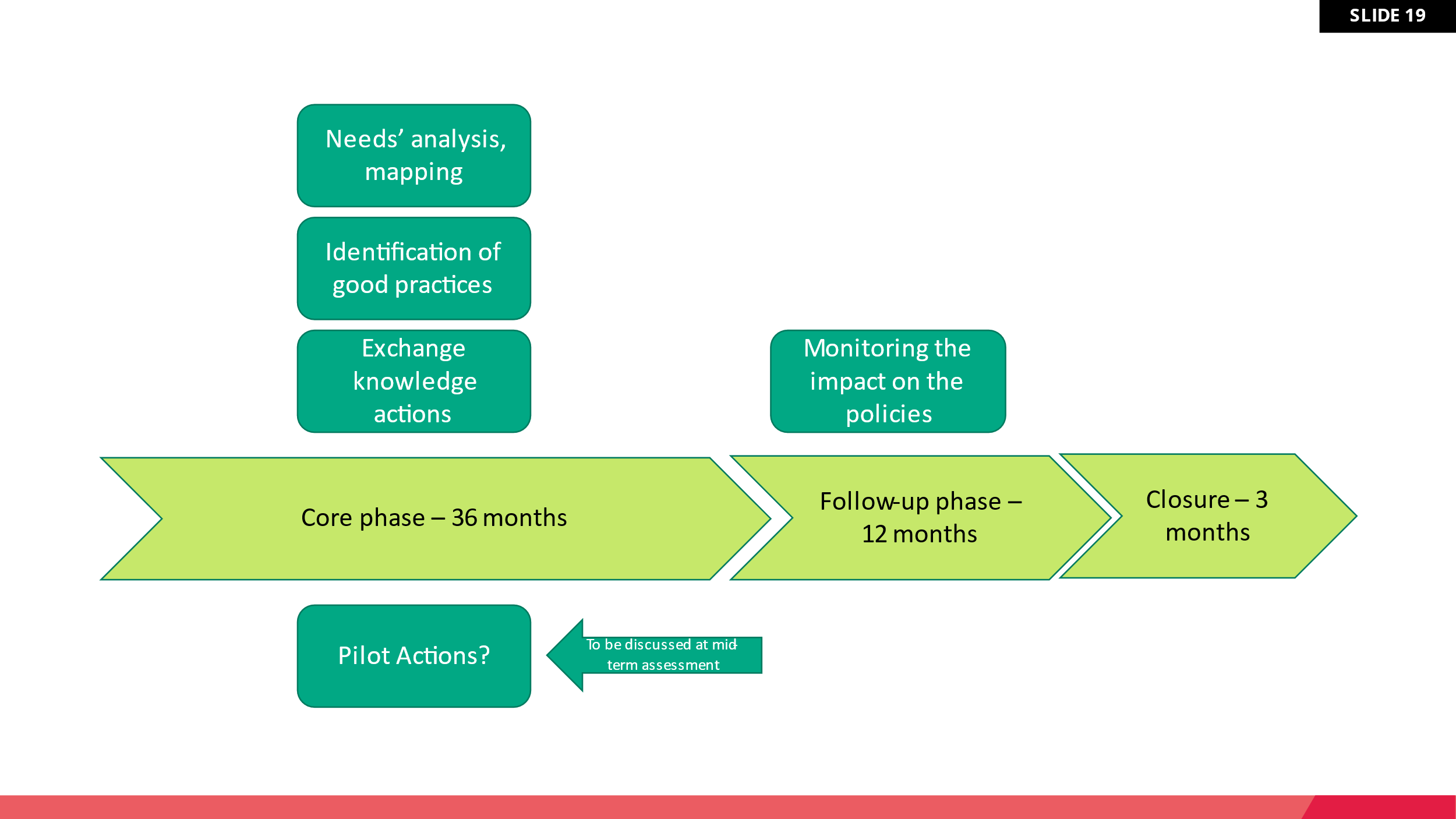
Overall, the European Commission's digital strategy on open data provides an encouraging policy framework that supports the goals of OD4Growth project. The emphasis on transparency, collaboration, innovation, and accessibility aligns well with our project's aim to develop tailored learning actions to improve open data availability, usage, and processing across European territories. The strategy's recognition of the economic and societal potential of open data further strengthens the case for our project's initiatives in promoting positive impacts and spin-offs.

# Interreg program ambitions and project planning scheme

Interreg Europe primarily targets local and regional public authorities and focuses on identifying, analysing, disseminating, and transferring good practices and policy lessons with a view to improving the design and delivery of regional development policies. In other words, it capitalises on what works. Interregional cooperation addresses policy needs at the intra-regional level by seeking solutions to those needs from other regions. For example, if a public authority determines that its waste management policy is underperforming, it may decide to change its approach. It can do so through discovering inspiring new approaches in an Interreg Europe project with other authorities in Europe facing similar challenges.

To support the improvement of public policies in the regions represented by each partner, the OD4Growth project is organised in 4 main interdependent work streams to be carried out in 3 years:

* Need’s analysis mapping
* Identification of good practices
* Exchange knowledge actions
* A pilot action



**Precisions concerning the pilot action and follow-up phase:**

Pilot action: Depending on the needs identified at the start of the project, the type of support required, a pilot action could be conducted by the partners.

*A pilot action is an implementation-related activity dedicated to testing a new approach to public intervention. This is usually the transfer of a successful practice from one region to another, but it can also be a new initiative jointly designed by the project. The ultimate objective of a pilot action is that, when it is successful, it is ultimately integrated into the policy instrument addressed and therefore contributes to improving it.*

*it should be jointly developed and implemented by the partnership. According to EC guidance, ‘jointly developed’ implies the involvement of partners from at least two participating countries. This requirement is obviously met when the same pilot action is tested in several regions. When it is implemented in one region only, the involvement of a partner from another country will still be required.*

Action plan: A document specifying how the lessons learnt from the cooperation work in the core phase will be implemented in a region in order to improve the policy instrument addressed by this region. It provides information on the nature, costs, and timeframe of the action(s) to be implemented, the stakeholders involved, and the way the action(s) derive from the project.

*Only regions that do not achieve a policy improvement by the end of the core phase need to produce an action plan. Template in appendix 1 of the programme manual*

Follow up phase:Each partner will monitor the first effects of the policy improvements and monitor whether additional policy improvements are being or have been achieved. This phase could also include an exchange of experience on policy improvements (if relevant)

*Each partner is responsible for implementing and monitoring the progress of their action plan and for reporting to the lead partner. It should be noted that Interreg Europe will support only the costs incurred for the monitoring; the costs related to the implementation itself of the actions cannot be covered by the project’s budget but must be funded from relevant local, regional, or national sources.*

**Obligations and content of the methodology**

In order to measure the progress of the actions and the achievement of the project objectives, this deliverable:

* Reminds of generic principles that partners should take into account when designing support to open data projects
* Reminds the partners of the rules linked to the programme that allow a deliverable to be validated or not
* Propose elements to be taken into consideration by each activity manager so that he/she can design the indicators and evaluation protocol for each learning process tool

Each activity manager will be required to take these measures into account when designing the tools or activities for which they are responsible.

The overall learning process will be planed, and necessary tools appointed in this sense.

# Specificities and national open data roadmaps in Europe.

The European Commission's report on open data maturity[[2]](#footnote-3) provides valuable insights into the maturity of open data practices across Europe and highlights specific considerations when developing roadmaps at national, regional, and territorial levels. Here are the key takeaways from the report, with an emphasis on the importance of tailored roadmaps:

1. **Assessing Open Data Maturity:** The report assesses the maturity of open data practices in European countries. It evaluates various dimensions such as policy, legal framework, quality, and accessibility. This assessment underscores the need for targeted interventions to enhance open data practices.
2. **National, Regional, and Territorial Diversity:** The report acknowledges the diversity in open data maturity across different levels - national, regional, and territorial. This recognition is crucial as it aligns with our project's focus on tailoring learning actions to meet the unique needs and characteristics of each territory.
3. **Importance of Tailored Roadmaps:** The report highlights the significance of developing roadmaps to guide open data initiatives. Roadmaps provide a structured approach for achieving specific goals and milestones. However, the report also acknowledges that roadmaps should consider the varying contexts at different levels to develop learning action plans that account for individual territory nuances.
4. **Policy Instruments and Stakeholder Engagement:** The report discusses the role of policy instruments in advancing open data practices. It also stresses the necessity of engaging stakeholders at different levels to ensure effective implementation of roadmaps. This engagement echoes your project's approach of involving key stakeholders in crafting learning actions.
5. **Collaboration and Exchange:** The report underscores the value of collaboration and exchange of best practices across countries and regions. This aspect resonates with our project's emphasis on sharing knowledge and experiences among different territories to foster collective learning.
6. **Sustainability and Evolution:** The report acknowledges that open data initiatives require sustained efforts and evolution. Roadmaps should consider long-term sustainability and the adaptability of strategies as open data practices evolve over time.

In summary, the European Commission's report on open data maturity underscores the need for tailored roadmaps at national, regional, and territorial levels. The report recognizes the diversity in open data readiness and maturity across different contexts, reinforcing the importance of creating learning action plans that address specific needs and characteristics. This alignment with our project's approach to developing customized learning action plans strengthens the potential for positive impacts and outcomes in enhancing open data availability, usage, and processing. The following point emphasises those territorial characteristics that must be taken into account.

# Generic recommendations for launching any open data project

OD can be used to increase quality standards of public services addressed to citizens and to support business development (products and services on the market). To overcome the barriers that still prevent the full reuse of public sector information, availability, usability and processing of OD must be improved.

In order for open data projects to emerge and mature, it is necessary to **consider different dimensions in order to build the appropriate support path**:

* A solution using OD aims to meet a need or a **problem expressed by** various possible applicants (employees of a public or private structure, citizens, people passing through, retirees, representatives of legal entities). It is important to have the opinion of the different stakeholders in order to qualify the use case and to identify the points of possible synergy and friction. Types of learning activities you propose should be tailored to the **socio-type, existing knowledge, and stage of change dynamics of the stakeholders involved**.
* The use case studied may concern a more or less important **geographical, legal and stakeholder perimeter**. It is therefore important to involve the competent authority and all the stakeholders concerned in the analysis of needs and the resources that can be made available.
* The construction of a solution and an action plan needs to **take into account the maturity in different dimensions**:
  + Technology readiness level: What is the maturity of the infrastructure, the nature, quantity and quality of the data currently shared, the solution for processing DOs? Do they allow the use case to be met?
  + Team readiness level: Each territory is a unique environment. Each use case must be dealt with at a scale that corresponds to the one that enables the problem to be solved and the legitimate stakeholders to be involved. The communities that issue and the companies that use OD are not the only parties involved. Who are all the stakeholders? What is the maturity of the coaches and applicants/stakeholders on the subject? How can they be made to grow so that they have the same maturity and can dialogue/construct together?
  + IP readiness level: Does the OD data governance strategy enable a viable and sustainable solution to be built for the parties? What is the origin of the data, the codes, what are the operating licences or the clauses of the current delegation contracts? Do they allow for action as intended?
  + Customer Readiness Level: What is the mindset of users and beneficiaries? Are they involved in the development of the solution? Has the value proposition been validated? Do we know exactly what their needs are, and what obstacles they might face in adopting the solution? At what stage of the change process are they?
  + Business Model Readiness Level: Do the territorial stakeholders established that the concept can be financially, environmentally, and socially viable and feasible? Are the activities and partners required to implement the value proposition ready?
  + Funding Readiness Level: Do the project partners secure the necessary funding to take the idea to the market?
* Maturity should be measured at project level, using indicators such as the KTH innovation tool[[3]](#footnote-4), but in the case of open data, we also need to look at the maturity of the territory in which the project is located (see point 2).

Activities 2, 3 and 4 should provide an opportunity to explore these different dimensions. Tools such as the support for describing good practice (Activity 2 semester 1) can be used to build use cases and identify the necessary learning activities. Maturity assessments tools (like KTH innovation tool, data maturity tool published by the EU commission[[4]](#footnote-5)) should be used by partners on an ongoing basis to assess needs and measure progress.

# "Guideline" to identify the needs for learning activities

Developing a customized learning action plan for enhancing the availability, use, and processing of open data in various European territories requires a strategic and adaptable approach. This chapter is thought to be a methodology to enable each project partner to create a tailored plan that considers the unique characteristics of its region while accommodating different levels of skill maturity and change readiness of its stakeholders. This methodology is based on several steps that will be detailed in section 2 and 3 in this report. Section 2 details how to conduct Need’s assessment, stakeholders’ mapping, maturity assessment and the link with activities 2 to 6 in semester 1 of the project.

# Timeline and link between semester 1 activities

To accompany the evolution of public policies and promote the use of public data, the learning activities must be organised over time after identifying the territories and stakeholders at stake, their needs, but also the good practices they have already put in place so that they can be disseminated to others. This will led to the establishment of qualified Use Cases and a classification of territories that will be used to prioritize and calibrate interventions.

Une image contenant texte, capture d’écran, Police, Graphique

Description générée automatiquement

The selection of the territories to be supported and the good practices to be disseminated can be done in a collegial manner from the beginning of the project and objective criteria must be established to measure the maturity of the approaches, propose actions and measure its evolution.

It is also important to note that some group of activities contribute to the same objective / outcome / impact.

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Description générée automatiquement  
Thus, the following chapters present the overall articulation between the tasks, the input and output data expected for each and propose tools and a methodology that can be used to monitor the evolution.

Figure 1: articulation between the activities over time

# Needs assessment, stakeholder mapping, and maturity assessment

To conduct the needs assessment, stakeholder mapping, and maturity assessment for open data project in European territories, there are several ways:

**1. Needs Assessment:** The needs assessment phase involves gathering information to understand the specific challenges and opportunities related to open data in each territory. Here's how ones could approach it:

* **Desk Research:** Start with a thorough review of existing reports, studies, and datasets related to open data in each territory. This will provide you with a baseline understanding of the current state.
* **Surveys and Interviews:** Develop surveys and interview guides to collect insights from key stakeholders. Target government officials, industry representatives, academic researchers, and community leaders. Ask about their experiences, pain points, and aspirations related to open data.
* **Focus Groups:** Organize focus group discussions to encourage dialogue among stakeholders. This can uncover nuanced perspectives and identify common themes.
* **Comparative Analysis:** Compare the open data initiatives of each territory with those of others. Identify successful practices that could be adapted to local contexts.

**2. Stakeholder Mapping:** Stakeholder mapping involves identifying and categorizing key players in each territory who have an interest or influence in open data initiatives. Here's how ones could approach it:

* **Identify Stakeholders:** Make a list of organizations, government bodies, businesses, academic institutions, non-profit organizations, and individuals who are relevant to the open data ecosystem.
* **Categorize Stakeholders:** Categorize stakeholders based on their roles, interests, and influence. For example, categorize them as data providers, data users, policymakers, technical experts, and advocacy groups.
* **Stakeholder Engagement:** Engage with these stakeholders through surveys, interviews, and direct interactions to understand their priorities, concerns, and expectations.

**3. Maturity Assessment:** The maturity assessment helps understand the readiness of each territory in terms of skills, infrastructure, and resources related to open data. Here's how ones could approach it:

* **Framework Development:** Create a maturity assessment framework that outlines different dimensions of open data maturity, such as technical infrastructure, data quality, governance, and skill levels.
* **Scoring System:** Develop a scoring system for each dimension, assigning scores based on the current state in each territory. This could be done through a combination of self-assessment by stakeholders and independent assessment.
* **Site Visits and Surveys:** Conduct site visits or virtual meetings with representatives from each territory to gather detailed insights. Additionally, administer surveys that address specific dimensions of open data maturity.
* **Expert Validation:** Seek validation from subject-matter experts who are knowledgeable about open data best practices. They can provide an external perspective and ensure the accuracy of your assessments.
* **Benchmarking:** Compare the maturity levels of territories against each other and against industry benchmarks to understand where each territory stands relative to others.

Partners have to remember, these assessment activities should be iterative and collaborative processes involving engagement with stakeholders. Regularly update and refinements of the assessments are recommended as partners gather more information and insights. The findings from these assessments will serve as a foundation for tailoring each learning action plan to meet the specific needs of each territory.

**Suggestions to the elaboration of the semester 1 activities regarding the theory**

To conduct those tasks here are some suggestions to take the better advantage of the planned activities:

* **Activity 2: a relation with needs assessment and learning action plan**

Identifying best practices also helps to map stakeholders, identify new needs and measure maturity in relation to them.

The collection of good practices among project partners will also be used to establish peer learning and collaboration between territories to share their experiences, challenges, and solutions.

* **Activity 3: needs assessment, stakeholder mapping, and maturity assessment**

Activity 3 should make it possible to:

* Identify the territories/OD use case to be supported and to characterise their degree of maturity.
* Identify the stakeholders to be invited to the first stakeholders meeting and to prepare a description of possible use cases for selection.
* Cluster the territories into four categories according to their performance, ranging from beginner to followers, fast-trackers and trend-setters, and includes key insights into each grouping to adapt the support during the project.

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Description générée automatiquementTo elaborate the analyse guideline and be able to measure and monitor the evolution of some KPI (quality of data, quantity, use / valorisation), analyse the global situation (maturity of the ecosystem and project), it is possible to adapt the european published tool (<https://data.europa.eu/fr/publications/open-data-maturity>).

Special attention: This diagnosis should assess the situation related to each use case and involve all stakeholders. (Publisher / User / ecc.)

Figure 2 : Maturity assessment methodology

https://data.europa.eu/sites/default/files/landscaping\_insight\_report\_n8\_2022.pdf

Users have to transform the “open data portal” dimension to:

* match the imperative to track improvements in the amount of data.
* adapt to small territories.

* **Activity 5: stakeholders meeting n. 1**

The first meeting with the stakeholders should make it possible to:

* present a first selection of territories (or even to complete it with them).
* present the diagnosis that will be used to audit the stakeholders involved in these use cases.
* select the use cases to be studied in greater depth during the first phase of the project and to plan the timing of meetings with the stakeholders to review progress on each of the selected use cases.
* set activity 6 which aims to select the 3 thematic crossing groups and the participants in them.

This will impact activity 4.

* **Activity 4: needs assessment, stakeholder mapping, and maturity**

By filling in the survey to assess local users' needs, expectations, etc and assess knowledge and skills available for OD management, the activity will enable the Identification of:

* knowledge gaps
* experts who can transmit knowledge / know-how
* good practices

This activity should be a privileged moment to clarify the needs of stakeholders in the territories. This could be capitalised within use cases.

* **Activity 6: establishment and kick-off of 3 thematic crossing groups**

Analysis of the results of the analysis of the territory's needs and the state of maturity of each use case to decide with them which use cases to support during the project.

Completion of the good practice portfolio

**Conclusions: All these activities will contribute to 2 major studies (activity 2 and 3 in semester 2) that will determine the learning activities to be build.**

# "Guideline" to design the learning activities

# Calibration of learning actions according to project technological maturity

Developing a new service based on open data involves several technical milestones that guide the project's progress. Several models have already been published. Below is an example.

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Description générée automatiquement

Figure 3: Schematic view of the technical milestones that guide a data project's progress

*The learning activities to be carried out could help to tackle all those steps. This picture could help defining the objectives and format of each learning activity, the inputs and outputs to be obtained at each step.*

Depending on the maturity of the open data projects that will have been detected, the support needs will not be the same for the territories. The learning actions will therefore have to be configured according to the situation. Nevertheless, it will be necessary to be able to show that these actions have enabled progress in relation to the project's outputs, outcome and impact indicators.

Here are the typical technical milestones, along with possible learning activities at each stage:

**1. Data Discovery and Collection:**

* **Technical Milestone:** Identifying and collecting relevant open data sources that align with the service's goals.
* **Learning Activities:** Workshops on data discovery techniques, web scraping, data APIs, and data source evaluation.

**2. Data Cleaning and Preprocessing:**

* **Technical Milestone:** Cleaning, transforming, and structuring the collected data to make it usable for analysis.
* **Learning Activities:** Training sessions on data cleaning tools, data formatting, and handling missing values.

**3. Data Analysis and Exploration:**

* **Technical Milestone:** Analyzing the data to uncover patterns, trends, and insights that inform the service's design.
* **Learning Activities:** Data analysis workshops, statistics training, and exploratory data analysis exercises.

**4. Service Design and Prototyping:**

* **Technical Milestone:** Designing the user interface, functionality, and interactions of the service.
* **Learning Activities:** User experience (UX) design workshops, prototyping tools training, and design thinking sessions.

**5. Data Integration and APIs:**

* **Technical Milestone:** Integrating data into the service using APIs or other data integration methods.
* **Learning Activities:** API integration tutorials, web services training, and backend development workshops.

**6. Visualization and User Interaction:**

* **Technical Milestone:** Creating data visualizations and user interfaces that effectively communicate insights.
* **Learning Activities:** Data visualization workshops, front-end development training, and interactive design sessions.

**7. Performance Optimization:**

* **Technical Milestone:** Optimizing the service's performance, responsiveness, and scalability.
* **Learning Activities:** Performance tuning workshops, caching strategies, and load testing exercises.

**8. User Testing and Feedback:**

* **Technical Milestone:** Conducting usability testing and gathering user feedback to improve the service.
* **Learning Activities:** Usability testing methodologies, user feedback collection techniques, and user-centered design principles.

**9. Data Privacy and Security:**

* **Technical Milestone:** Ensuring that user data and open data sources are handled securely and comply with privacy regulations.
* **Learning Activities:** Data security workshops, GDPR compliance training, and cybersecurity awareness sessions.

**10. Deployment and Maintenance:**

* **Technical Milestone:** Deploying the service to a production environment and ensuring its ongoing maintenance.
* **Learning Activities:** DevOps training, deployment best practices, and service monitoring techniques.

**11. Continuous Improvement:**

* **Technical Milestone:** Continuously enhancing the service based on user feedback and changing data needs.
* **Learning Activities:** Agile development methodologies, iterative design, and continuous deployment strategies.

Throughout these technical milestones, learning activities play a crucial role in upskilling the project team and stakeholders. The activities can include workshops, training sessions, hands-on labs, peer learning, and knowledge sharing sessions. Different meeting formats are possible depending on the maturity of the territory and the people mindset.

# Calibration of learning actions according to socio-types and stage of change dynamics

Types of learning activities you propose should be tailored to the socio-type, existing knowledge, and stage of change dynamics of the stakeholders involved. Here's a breakdown of different learning activities based on these factors:

**1. Socio-Type:** Different stakeholders may have varying levels of familiarity and comfort with open data. Here are learning activities based on socio-types:

**Novices or Skeptics:**

* **Webinars and Workshops:** Basic webinars or workshops introducing open data concepts, benefits, and use cases can help novices and skeptics understand the value proposition.
* **Case Studies:** Real-world examples showcasing successful open data implementations can inspire confidence and help skeptics see the practical benefits.

**Intermediate Users:**

* **Skill-Building Workshops:** Workshops focusing on specific skills, such as data cleaning, visualization, or basic data analysis, can enhance the capabilities of intermediate users.
* **Hands-On Labs:** Interactive sessions where participants work on real open data projects can provide hands-on experience and build confidence.

**Advanced Contributors:**

* **Masterclasses and Expert Talks:** Invite experts to deliver advanced sessions on topics like data ethics, advanced analytics, and predictive modeling to stimulate advanced contributors.
* **Hackathons and Data Challenges:** Engage advanced users in hackathons or data challenges that encourage them to solve complex problems using open data.

**2. Knowledge Level:** Depending on stakeholders' existing knowledge levels, you can offer learning activities that build on their current understanding:

**Foundational Knowledge:**

* **E-Learning Modules:** Interactive online courses covering basic open data concepts, terminology, and principles can establish a solid foundation.
* **Infographics and Guides:** Visual resources simplifying complex concepts can make them more accessible to those new to the subject.

**Intermediate Knowledge:**

* **Deep-Dive Webinars:** Webinars diving into specific open data topics, such as data licensing, data quality assurance, or data privacy, can help build more in-depth knowledge.
* **Tutorials and How-To Guides:** Step-by-step guides demonstrating processes like data wrangling, API usage, or creating interactive visualizations can advance their skills.

**Advanced Knowledge:**

* **Peer Workshops:** Organize workshops where advanced users share their experiences and insights, fostering peer-to-peer learning and advanced discussions.
* **Research Collaborations:** Encourage advanced users to collaborate on research projects that leverage open data, pushing the boundaries of knowledge.

**3. Stage of Change Dynamics:** Adapting learning activities based on the stage of change a stakeholder is in can foster effective engagement:

**Awareness and Interest:**

* **Webinars and Seminars:** Engaging presentations introducing open data's importance, potential, and impact can raise awareness and spark interest.
* **Ted-Style Talks:** Short, inspiring talks sharing success stories and innovations can capture attention and generate curiosity.

**Consideration and Planning:**

* **Workshops and Brainstorming Sessions:** Facilitated sessions where stakeholders brainstorm ideas for integrating open data into their work can drive consideration and planning.
* **Roadmapping Exercises:** Guided exercises to create open data integration roadmaps aligned with stakeholders' goals can encourage strategic thinking.

**Adoption and Implementation:**

* **Practical Labs:** Hands-on labs with real datasets and tools can help stakeholders directly apply open data practices in their projects.
* **Mentoring and Coaching:** Provide one-on-one support from open data experts to guide stakeholders through the challenges of implementation.

**Sustaining and Scaling:**

* **Communities of Practice:** Establish online communities where stakeholders can share experiences, challenges, and best practices for long-term sustainability.
* **Advanced Training Programs:** Offer advanced training for stakeholders looking to deepen their expertise and further integrate open data in their work.

A mix of these learning activities will be designed and sequenced based on the unique characteristics of each stakeholder group. Flexibility is key to ensure that stakeholders receive the most relevant and effective learning experiences tailored to their needs and stages of engagement with open data. Different territories might prefer different delivery modes based on their local context. Some might prefer in-person workshops, while others might benefit more from virtual sessions. Make the learning resources available through multiple channels to accommodate diverse preferences.

# Calibration of learning activities according to other barriers which can hinder the maturation of a project based on OD

[**Data**](https://theodi.org/insights/tools/scaling-data-enabled-projects-a-checklist/#1561647796257-321787f1-6a6f)[[5]](#footnote-6)

* **Data availability:** A project may collect and use a dataset that other organisations do not have access to
* **Data licensing:** Access to non-open data may be costly or difficult for others
* **Data quality:** The data collected may not be fit for purpose, therefore costs will be incurred in cleaning it or making it suitable for a new area or team
* **Different data formats:** If data is stored in different ways and using different formats then a project may struggle to be replicated
* **Legal issues:** The legal landscape may have changed since the original project was run
* **Ethical issues:** A project may have run as a small pilot where explicit ethical issues could be managed effectively but would be harder to manage at a larger scale

[**Technical**](https://theodi.org/insights/tools/scaling-data-enabled-projects-a-checklist/#1561647796325-bab4adc6-3368)

* **Proprietary software:** Services developed using proprietary software minimise the scope for sharing, due to a lack of access for others, and increased financial costs
* **Closed source:** When relevant source code or tools are not openly available, a new team must develop a new version rather than use something that already works

[**Resource**](https://theodi.org/insights/tools/scaling-data-enabled-projects-a-checklist/#1561647796400-3ed2235a-dab4)

* **Initial funding:** The need to secure initial funding – through proposals, grants, or winning competitions – may act as a barrier to organisations replicating work
* **Sustainable funding:** Projects need sustainable funding for ongoing costs, procuring help, accessing data etc. A sustainable project can grow or be replicated more easily. Interested parties need skills, time and resources to redeploy projects or initiatives
* **Skills or resources:** Interested parties need skills, time and resources to redeploy projects or initiatives

[**Knowledge**](https://theodi.org/insights/tools/scaling-data-enabled-projects-a-checklist/#1561647796532-79c25e8c-f476)

* **Awareness and communication:** A project’s successes or failures are often only known to the teams, but not others outside of them
* **Different users:** Users for one service might be specific to one location or problem, and not exist elsewhere
* **Documentation:** It may be unclear how to approach replication and the risk might seem too great
* **Evidence of impact:** Pilots and projects can be short, with little evidence of their success, failures or viability on a larger scale

[**Collaboration**](https://theodi.org/insights/tools/scaling-data-enabled-projects-a-checklist/#1561647796625-86725a54-7c7d)

* **Engagement and collaboration:** A reluctance for different organisations to work together can mean that risk and reward is not shared
* **All these themes could be the subject of a learning activity**

# Monitoring and evaluation - Details from the program manual

It is necessary to be able to show that each activity (including learning actions) contributes to the achievement of the objectives of results, outcome and impact targeted by the Interreg programme.

In order to help design the activities in more detail, here are some rules from the programme manual that must be followed to validate a deliverable.

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Description générée automatiquement

Precisions:

* RI2 Organisations: number of organisations whose professional capacity has increased thanks to their participation in the project’s activities. The term ‘organisations’ includes the project partners, the associated policy authorities as well as the stakeholders actively involved in the cooperation activities.
* Projects should achieve policy improvements at the latest by the end of the core phase
* Interreg Europe cannot finance the implementation of the policy improvements and action plans
* RI3 Improving policies: Interregional cooperation can influence policy instruments in various ways. Based on the experience gained from previous programmes, policy improvements can be categorised into three main types, which can be interconnected.
* Type 1: A new type of project Interregional cooperation is a source of inspiration that can entirely revamp projects supported by existing policy instruments. This means that, using the lessons learnt from interregional cooperation, a region implements, in its territory, a new type of project financed through one of its existing policy instruments. This type of result is the most common. It implies the availability of funding within the policy instrument addressed. In some case, it is not one but several new projects that are supported through, for instance, the launch of a dedicated call for proposals.
* Type 2: change in the management of the policy instrument (improved governance) Interregional cooperation can also influence the way a policy instrument is managed and implemented. New approaches can be adopted thanks to the lessons learnt from other regions. These improvements may, for instance, be related to: • a revised methodology for evaluating the performance of the policy instrument • the introduction of new criteria for selecting the projects supported by the policy instrument • a more efficient way to publicise/advertise the calls for proposals launched under the policy instrument • a modification of the decision-making rules or of the composition of the managing committee in charge of implementing the policy instrument.
* Type 3: A revision of the policy instrument addressed (structural change) The third type is the most challenging since it requires a change to the policy instrument addressed. It occurs when, based on the lessons learnt from the cooperation project, a region modifies the main features of this instrument. This can, for instance, take the form of adding a new priority or measure. It can also involve modifying the budget allocation between the policy instrument’s different priorities.

# Monitoring and evaluation methodology for a specific activity

The output, results and impact macro-indicators imposed by the Interreg program need to be fed by micro indicators linked to each specific activity (e.g. a learning action). During the design phase of the activities for which they are responsible, project partners must think about the resulting outputs, results/outcomes and impacts which are defined within the program manual to enable the gradual collection of data to feed into the indicators planned.

Evaluating the results, spin-offs, and impacts of learning actions related to open data initiatives requires a comprehensive methodology that takes into account both qualitative and quantitative aspects. Here's a suggested methodology for evaluating the specific outcomes of your activities:

**1. Define Key Performance Indicators (KPIs):** Start by defining a set of clear and measurable KPIs that align with the specific Output, results and impact of the project. These KPIs should reflect the intended results, spin-offs, and impacts you mentioned, such as the number of policies addressed, identified good practices, improved organizational capacity, and enhanced policy instruments.

**2. Baseline Assessment:** Before implementing the learning actions, conduct a baseline assessment of the current state of open data initiatives in each partner's territory. This will provide a benchmark against which you can measure progress and changes.

**3. Monitoring and Data Collection:** Implement a systematic data collection process to track progress and gather relevant information throughout the project. This could involve regular surveys, interviews, site visits, and data analysis. Collect both quantitative data (e.g., the number of workshops conducted, participants trained) and qualitative data (e.g., stakeholder testimonials, success stories).

**4. Progress Tracking:** Regularly track progress against the defined KPIs. Create dashboards or reporting mechanisms that visualize the data collected and provide a clear overview of how each partner is performing against the established targets.

**5. Case Studies and Success Stories:** Collect in-depth case studies and success stories from each partner territory. These narratives can highlight specific instances of policy improvements, capacity enhancements, and positive impacts resulting from the learning actions. Case studies provide a qualitative context to complement quantitative data.

**6. Stakeholder Feedback:** Gather feedback from stakeholders who participated in the learning actions. Conduct surveys or interviews to understand their perceptions of the value gained, knowledge acquired, and changes they have witnessed as a result of the initiatives.

**7. Comparative Analysis:** Perform a comparative analysis between the baseline data and the collected data to identify trends, changes, and improvements. Compare the initial state with the current state to gauge the effectiveness of the learning actions.

**8. Feedback Loops and Adaptation:** Use the evaluation findings to make necessary adjustments and adaptations to the ongoing learning actions. If certain approaches are proving more successful in generating positive impacts, consider scaling them up or replicating them in other territories.

**9. Cost-Benefit Analysis:** Conduct a cost-benefit analysis to assess the investments made in the learning actions and the returns in terms of policy improvements, increased open data capacity, and other desired outcomes.

**10. Stakeholder Engagement:** Engage stakeholders in the evaluation process itself. Seek their input on the relevance and effectiveness of the learning actions. This engagement fosters a sense of ownership and provides insights for refining future initiatives.

**11. Long-Term Sustainability:** Assess the sustainability of the impacts generated by the learning actions. Are the improvements and changes sustained over time? This will help gauge the long-term effectiveness of your interventions.

**12. Summative Evaluation:** At the conclusion of the project, conduct a comprehensive summative evaluation that consolidates all the data, findings, and insights. This evaluation should provide a holistic view of the project's outcomes, including quantitative achievements, qualitative impacts, and lessons learned.

By following this methodology, we will be able to demonstrate the tangible results and positive impacts of the learning actions across different partner territories, showcasing the value of our open data initiatives and informing future strategic decisions.

**Operational example.**

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Description générée automatiquement

# Annexes

# Example of use case

Uses cases mixing open data and private data

|  |  |  |  |
| --- | --- | --- | --- |
| **Themes** | **Examples of use** | **Positive externalities** | **Estimated ROI** |
| Waste | * Overflow prevention * Adapt collection to needs in real time * Route optimization * Prevent illegal dumping | * Improved quality of service * Reduced fuel consumption * Reduction in man-hours allocated to collection | * Possible postponement of equipment investments (truck fleet) * Reduce collection effort by 20 to 30%, while maintaining an overflow rate of less than 1% of its fleet. |
| Water | * Easy diagnostics in case of anomalies * Leak detection * Remote meter reading * Automatic watering | * Improved service * Reduced environmental impact * Reduction in human resources required for meter reading * Implementation of tertiary decree | Reduced leakage rate through preventive detection and optimized meter reading, saving one month's salary for 1,000 remote meter reading points. |
| Parking / Mobility | * Vehicle counting * Optimized parking management * Pedestrianization of streets * IRVE terminals | * Improved accessibility * Attractiveness * Quality of life * Reduction of Co2 emissions linked to the search for parking spaces | * Optimization of revenues from paid parking spaces * Rationalization of investments linked to the creation of new spaces (12K€/space) |
| Energy | * Optimization of public lighting consumption * Reducing consumption of public buildings | * Reduced environmental impact * Improved quality of service | * ROI from reduced energy consumption and/or predictive maintenance of lighting columns |
| Citizen relations | * CRM * Alert escalation | * Attractiveness * Efficiency of public action |  |
| Quality of life | * Noise reduction * Video protection * Ambient sensors in schools | * Attractiveness * Regulatory framework for pollutant measurement |  |
| Security | * Access control * Remote opening * Intrusion detection | * Security | * Savings linked to security and efficiency of action |

International uses cases based on open data

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Description générée automatiquement

<https://opendataimpactmap.org/usecases>

# Participants satisfaction survey templates - possibly on-line

Une image contenant texte, capture d’écran, menu, conception

Description générée automatiquement

1. <https://digital-strategy.ec.europa.eu/fr/policies/legislation-open-data> [↑](#footnote-ref-2)
2. <https://data.europa.eu/fr/publications/open-data-maturity> [↑](#footnote-ref-3)
3. <https://kthinnovationreadinesslevel.com/> [↑](#footnote-ref-4)
4. <https://data.europa.eu/fr/publications/open-data-maturity> [↑](#footnote-ref-5)
5. <https://theodi.org/insights/tools/scaling-data-enabled-projects-a-checklist/> [↑](#footnote-ref-6)