



D2.4: Pilot evaluation report including scale-up plan





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Acronyms of Partner Universities

- **BTU**: Brandenburg University of Technology Cottbus-Senftenberg.
- **PUT**: Poznan University of Technology.
- **UC**: University of Cantabria.
- **UMONS**: University of Mons.
- **UNICT**: University of Catania.
- **UPHF**: Université Polytechnique Hauts-de-France.
- **UVA**: University of Vaasa.

Other acronyms

- **EEP**: Expertise Exchange Platform.
- **EUNICE**: the European University for Customised Education.
- **REUNICE**: Research for the European University for Customised Education.
- **D #.#** : Refers to a Deliverable. The first number refers to the work package the deliverable belongs to. The second number refers to the deliverable number. For example, D2.1 would be deliverable 1 from work package 2.
- **DoW**: Description of Work.
- **M#**: Refers to a project month. M1 is the month on which the project started. M36 is the last month of the project.
- **WP**: Refers to Work Package. Usually followed by a number to refer to a specific Work Package with specific tasks.





Executive Summary

This report presents the outcomes of Task 2.4 and 2.5 to date. Since both tasks are continuous processes, this report represents their status at the time of deliverable deadline. This report covers the piloting time originally outlined in the project proposal, thus covering M12-31 to ensure coverage of the installation and usage period.

The key questions the reflection of the piloting phase of the defined platform solution aimed to answer were: 1) is it viable to outsource a platform such as the EEP? 2) should the alliance continue to use the EEP in it's current form?

From the piloting phase, the main challenge that has been identified has been adoption. The main proposal from the lessons learned and best practices is to apply a more centralised approach to campaigns. This approach would include several best practices, including: 1) precise timelines, 2) workshops, 3) seed ideas, 4) active moderation and participant engagement.

The answers to the key questions above are: 1) It is viable to outsource a platform such as the EEP. 2) The current form needs a different management and operational structure.

Overall, our recommendation is to extend the piloting with Qmarkets until the end of the extension of the project to ensure that the current form of the platform is tested using all the suggested best practices, as well as making the most of the enablement program proposed by Qmarkets.





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1. Introduction

This report represents the deliverable 2.4 *Pilot evaluation report including scale-up plan* of work package 2 within the Horizon2020 project REUNICE (*Research with and for Society in EUNICE*). The report presents firstly the outcomes of task 2.4 and has the purpose of reflecting on the pilot phase of the defined platform solution. The *platform solution* refers to the platform as developed and defined in REUNICE D2.2 and D2.3 respectively. This report will secondly cover the outcomes of task 2.5 of this project, in which the sustainability and the scaling of the defined platform solution are assessed based on the continuous feedback collected in task 2.4.

Task 2.4 included the piloting of the platform for the REUNICE project partner universities as well as their industrial and other stakeholders. The piloting was scheduled to run between September 2022 and September 2023 (M12-M24), however in practice it was run from September 2022 to May 2024 (M12-M31). It should be noted that the pilot also included the tendering and set up times, this is the reason for the longer piloting time in practice. Thus, the pilot also informs the alliance of whether or not the decision to outsource is viable or not. This is one of the key questions of this report.

Task 2.5 deals with the sustainability, the scaling of the platform was continuously evaluated throughout the piloting phase. Through collaboration with all partners, this task was run from the start of the tendering process all the way to the end of the project time (December 2024). Therefore, there will be some parts of task 2.5 that will fall outside of the scope of this report due to deliverable deadline. Thus, D2.4 has been finalised by month 35 with only minor adjustments prior to the final deadline of M36. Nonetheless, task 2.5 continues according to the proposal until the end of the project period, or M36.

The main challenge faced in the platform piloting phase is technology adoption, with most allies struggling to understand how to best use the platform. Nonetheless, the Minimum Viable Function of the platform (presenting and collaborating on relevant calls) exceeded expectations, and the ease of use has repeatedly been praised by allies. As a result, with adoption rates slowly increasing towards the end of the pilot, a decision was made to extend the usage period of the current set up until the end of the project period.

Overall, despite the challenges in terms of adoption, it shows signs of viability in its main function. The more refined functions still require effort in training and improving adoption rates amongst the allies. Based on this, this report is structured as follows: In the second section we describe the platform and the use cases it was intended to fulfil. In the third section we present and discuss some of the challenges and lessons learned





in the pilot. We also define some of the fixes that have been implemented, or that could be implemented in future, should the issue still be open. In the fourth section we present the campaigns and use cases that have been piloted accordingly to the structure outlined in deliverable 2.3. In the fifth and final section we conclude the report by presenting the outcomes of the pilot and justifying our decision to continue with the platform.

2. Platform Description

In this section, we describe the platform from different perspectives, to give the reader a better understanding of what was selected for piloting. In section 2.1 we discuss the platform structure. Section 2.1 ensures a sound understanding of the underpinning principles of the platform which support the use cases defined in deliverable 2.3. In section 2.2 we show how the different use cases can be implemented in the platform, and how the structure of the platform enables the variety of use cases.

2.1. Platform Structure

The platform that was developed to serve as the EEP has had two iterations. First an internally developed solution as described in D2.2. This earlier version served the core purpose but lacked interaction and community functions. Additionally, it was missing matching functions. Therefore, in collaboration with Qmarkets a new version was developed through outsourcing and by using the key requirements presented in both D2.2 and D2.3. Through this development work, a platform called Catalyst emerged, and the EEP was hosted on Catalyst.

2.1.1. Users and Systems

The platform structure can be presented in several ways. The first structure that we discuss is how the system is set up, and how that affects the users. The platform is named Catalyst and is composed of one main system. The system has two different tenants. The tenants are an internal tenant and an external tenant. The internal tenant represents a single subsystem. The internal tenant is exclusive for University of Vaasa users. The internal tenant has a limited number of users. During the pilot period the number of named users was 500. The external tenant is composed one subsystem. The external system caters for the Expertise Exchange Platform (EEP) and student initiatives. This subsystem has an unlimited number of users. Figure 1.1 displays this first way to structure the platform.

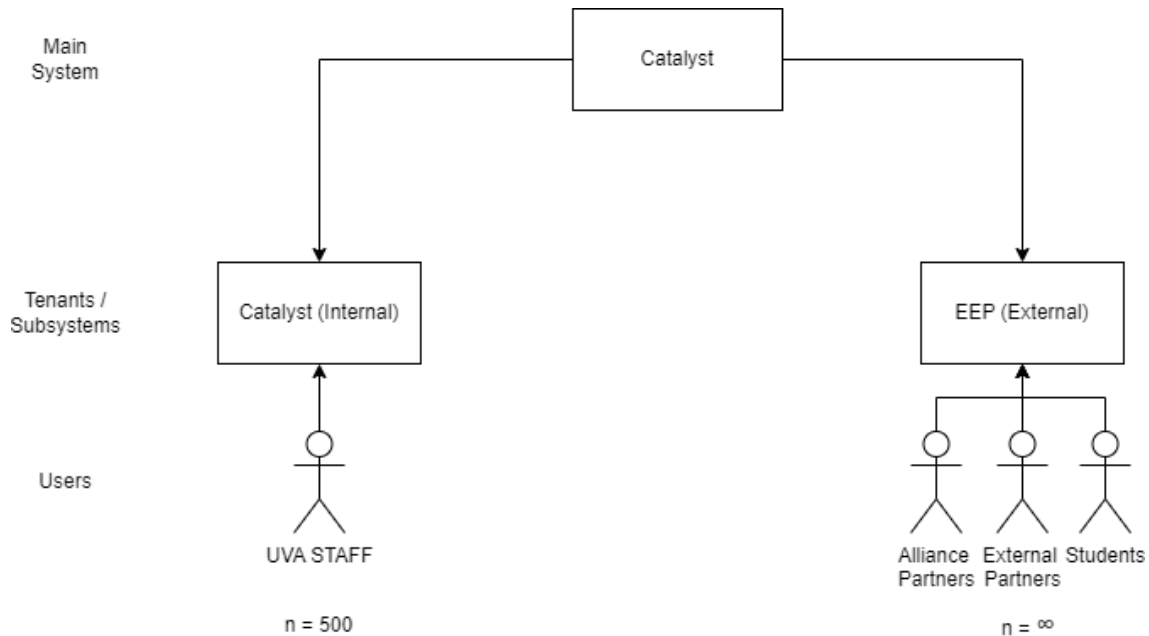


Figure 1.1 – The Platform Structure in terms of users and systems

2.1.2. Campaigns, Ideas, and Workflows

In this subsection we present another perspective to understand the platform. We cover the terminology and the concepts that allow us to understand the platform and how it relates to actual workflows.

The entire platform is based around “**Campaigns**”. A campaign is equivalent to a basket. This basket may be thematic or unstructured. The purpose of the campaign is to collect “**ideas**”. Campaigns also structure the *development* of an idea. Within a campaign, an idea can be reviewed by a selected group of users. These users are selected either by a “**campaign manager**” or by a “**super user**”. In academic/business terms one can liken a campaign to an open call. Some are more generic, and some are more specific.

“**Ideas**” are the base unit of the platform. To participate on the platform, one needs ideas. This is because by default there is always an open campaign called the random campaign. This campaign is designed to catch all ideas that fall outside of the themes of the open campaigns. Thus, all users always have a place to submit their ideas. To submit an idea, one must complete the idea form. The idea form is idiosyncratic to each campaign meaning that it can be modified according to the needs of the campaign. Depending on the campaign, ideas can be submitted anonymously, and/or confidentially. Anonymity in the context of the platform means that other participants



in the campaign cannot see the submitter. However, the campaign manager and possible super users will always see who the original submitter was. Confidentiality means that nobody else, besides the campaign managers and super users can see the entire idea.

Once an idea is submitted – if it is not confidential – other users may be allowed to comment and vote on it, depending on the campaign settings. Depending on the campaign settings different rounds of review may occur on the platform to help the idea producing team to develop the idea further. These steps are not only defined in the campaign settings but are also defined for each subsystem via a workflow.

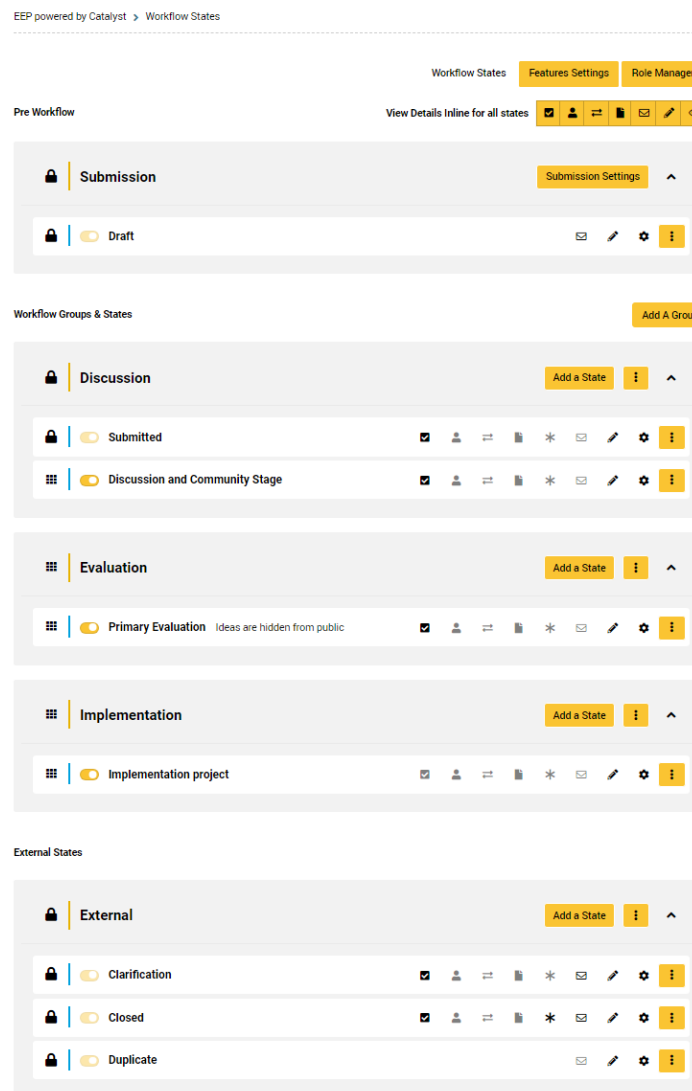


Figure 2.1 – EEP Workflow

As can be seen from Figure 2.1, the platform provides a way to create and modify the workflow for an idea. This workflow can then be modified at campaign level.

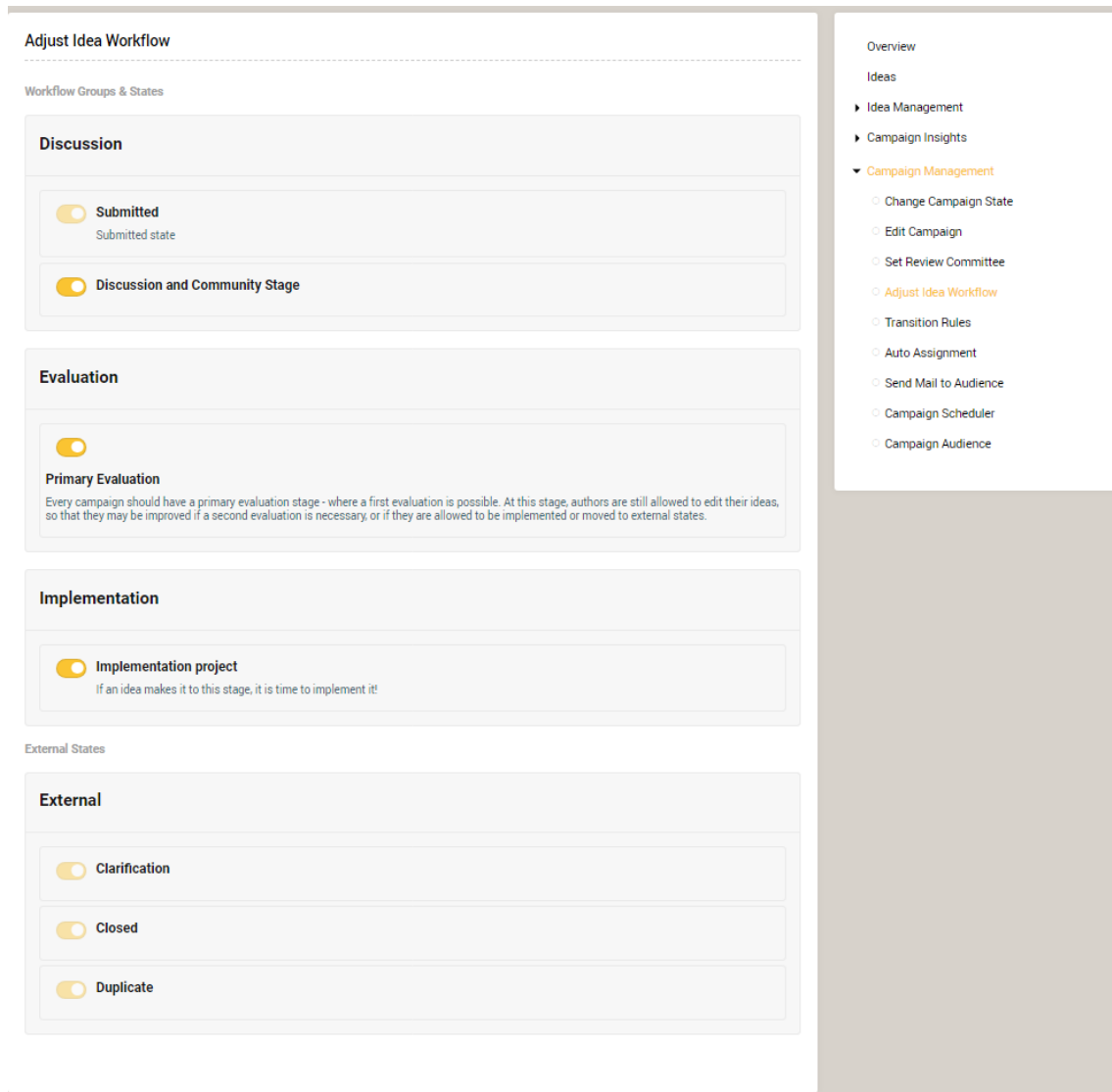


Figure 2.2 – Adjusting the workflow at a campaign level

In figure 2.2 it can be seen how the primary workflow of the sub-system dictates what can be done within a campaign in that subsystem. Here the Submission state is mandatory, as the campaign cannot have ideas without them being submitted. Additionally, a Discussion and Community stage can separately be activated if we want to engage the community with additional features which we might not want to include in the “submitted” stage of the Workflow block.



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Currently, a single Primary Evaluation stage has been sufficient in our workflow. However, there are options to expand this Evaluation stage, should the Alliance endeavour to require deeper expertise for certain campaigns. For example, an “expert panel review” could be added to the evaluation workflow in Figure 2.1. Then, as shown in figure 2.2. it could be activated and deactivated depending on the campaign.

The Implementation stage of the workflow is about keeping track of which ideas have been approved for implementation. It must be noted that if an idea is good enough, it may skip the evaluation phase and go directly into implementation (from a system perspective).

The External stage of the workflow refers to when the idea needs to be: a) sent back for clarification, b) closed, due to either successful implementation, or failing of the selection process, or any other reason, or c) marked as a duplicate, and therefore not relevant in its current form.

This way we can see how the workflow dictates how the ideas move through campaigns in which they are submitted. Additionally, in Figure 2.2 we can see how the workflow determines the kind of campaigns we can run. Further information about the platform is included in the appendices.

2.2. Concept Mapping

In this section we describe how we envision the conceptual connection between the use cases defined in D2.3 and the platform. This is a more concrete version of the theoretical exercise conducted in D2.3 where now we describe the use cases and how they are concretely applied in the platform.

The platform, intended for Expertise Exchange is underpinned by the basic definition outlined in the Description of Work (DoW). It is “a digital platform connecting university actors with other societal actors acting as a virtual market place”. To do this, and fulfil the goals outlined in the DoW, three main use case categories were defined – Internal, External, and Innovation Categories. These categories classify 10 different use cases. Each use case falls within the categories.



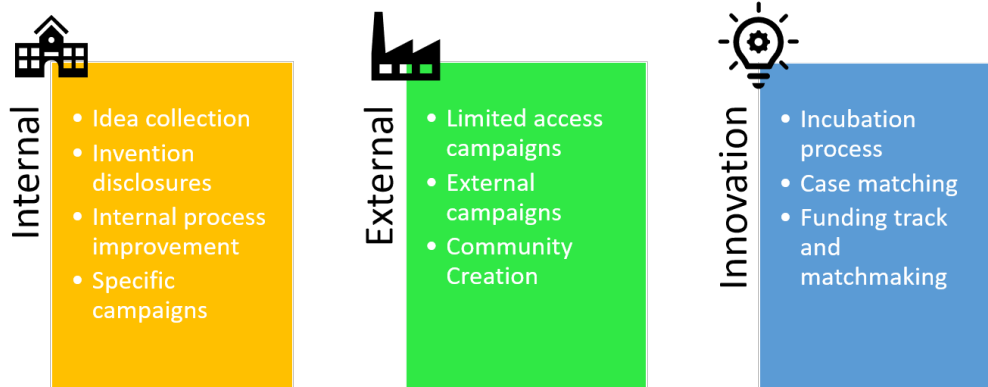


Figure 3.1 – Identified use cases for the EEP

Within the platform, “Idea collection” in the internal category simply refers to any campaign used to collect information or ideas strictly within a single university. Here the campaign limits the users whom have access to the campaign by using the e-mail address and associated institution of a user to determine whether the user can participate in the campaign. This idea collection is thematically organised, or is simply used as a “random ideas” campaign.

Continuing in the internal use cases, “Invention disclosure” use cases have to be internal *and* confidential. Therefore, this type of campaign relies heavily on the confidentiality features of the platform. The purpose of this use case is to modernise the workflow for invention disclosures at universities, thereby accelerating the patenting and IP protection process. Here, again, the users are limited by institution. Ideally, in this campaign, the technology transfer office (or equivalent office) of each institution owns the campaign and move the ideas through the workflow.

The third use case defined within the internal category is the “Internal process improvement” use case. The concept is to provide universities a more agile way of working by allowing anyone in the institution to anonymously (or not) submit ideas to improve the functioning of the university. This relies on the discipline of the university team in charge of the anonymity of the submitter to present these process improvement ideas to management in a way that ensures the submitters desire to remain anonymous (or not). Therefore, this function also creates the need for there to be a direct communication line to management, but with a mediator who has access to this specific campaign and ensures the proper presentation of ideas to top management.



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The fourth internal use case is labelled “Specific Internal Campaigns”. This is used to reflect the fact that different institutions work differently and might need specifically targeted campaigns internally. For example, a department might need a specific campaign related to propagating call information. This department can then use a campaign to collect all proposals related to a single (or multiple) calls, and select the best ones to go forward. Another example is internal department-wide competitions or challenges, where top management wants proposals for a specific issue, and wants to reach only a specific department. This use case is a more specific version of the “internal idea collection” use case.

Moving to the external use cases – “Limited access campaigns” are essentially specific campaigns for partners. Where specific universities decide which actors have access to which campaigns. For example, there are calls in which industrial partners are relevant, thus, the limited access campaign targets both the external partners’ industrial representatives and internal departments to collaborate to create a best possible proposal. The key here is that this is a setting where the university defines and invites external actors to campaigns.

The “External campaigns” use case is the opposite side of the same coin. In the external campaigns, external partners may define and post a campaign with any purpose. Here the goal is to get a specific (or the general) demographic in the university to answer a challenge, call, or other problem. However, from the piloting process of the campaign and understanding the confidentiality features, we also decided to extend this use case conceptually to also potentially include direct recruitment processes for e.g. internships, thesis work, or full-time entry-level positions. Where the campaign acts as the job posting (or several job postings), and candidates could use their idea as an application form.

The “Community creation” use case stems from the community features. In this use case, a campaign could represent a community, and that ideas themselves represent posts. Figure 4 shows an idea and subsequent discussion submitted to a campaign. The idea is titled “I would like to discuss start-up entrepreneurship for students”. Below several comments are made. These comments create own threads of discussion.





I would like to Discuss Start-Up Entrepreneurship for Students. (#3494)
 By [redacted] 09/09/2024 - 09:46 1 view

How can I best support Start-Up Entrepreneurship for Students?

Comments 7

[redacted] 24 - 09:52
 Here, we structure our Student entrepreneurship around a core learning module. It's part of our education program!
 Reply

[redacted] 24 - 09:54
 We have the same! But it's split over three modules - Start-up, Scale-up, and a "buy-side" course! :)
 Edit Reply Delete

[redacted] 24 - 09:53
 Do you only have a single learning module? or how does it work?
 Reply

[redacted] 24 - 09:54
 Yes! We have a single learning module, it covers all essentials around entrepreneurship! :D
 Edit Reply Delete

[redacted] 24 - 09:47
 In our university, we have used initiatives such as Start Up Competitions! :) Let me know if you want to discuss this more!
 Reply

[redacted] 24 - 09:48
 Ooh! I am interested in discussing this. How have you structured the competitions?
 Reply

[redacted] 24 - 09:51
 Our structure was simple, and enabled by the EUNICE project - we used the EUNICE Imagine Innovation Cup (EEIC) to organise a local phase, and then a finals phase as a motivator for the local phase participants.
 Essentially, in the local phase all students were allowed to pitch their ideas. They got coaching and the pitch event was at a set date. This was all done in a 6 week program which students could sign up for.
 After the pitch event a winner is selected, through the EEIC they are allowed to travel with all expenses paid to the final phases to a host country for the finals of the EEIC.
 In the finals, all the finalists pitch and the best pitch is selected as a winner with a small monetary prize at the end.
 Edit Reply Delete

Figure 4 – how a community interaction looks on the platform



The innovation use cases are the most complex to implement in the platform, but as briefly discussed in the idea disclosure use case, have the most potential to accelerate the innovativeness of an institution. The “Incubation process” requires excellent knowledge of how to manipulate the underlying workflow of the system. Where phases can be added for ideas (in this context representing a team or start-up) to grow as they complete tasks related to incubation.

“Case matching” relies on the community features of the platform. Where *ideas* are automatically matched. Here the use case is simply included as a feature in the platform. It is then up to the owners of the incubation process to get the two (or more) teams to talk to each other and see if there is synergy and if it makes sense to continue together.

In figure 5, we can observe the feature in the area highlighted by the red box. The idea is from the Staff Forum campaign. A community-based campaign. We can see that there has been discussion under the idea, in the form of 7 comments. However, the idea can also be matched to “recent ideas” within the campaign, as well as “similar content” from other campaigns. Here, the author of an idea, a campaign manager, or others who have access to the idea can recommend contacting teams or individuals in the “similar content” box. These connections can then lead to further collaboration, improvement, scope change, or merging of ideas.

We see that this feature has the potential to help accelerate innovation processes as it reduces the amount of duplicated work *platform-wide* as well as improving team formation. As a tool, this can also help evaluators (in campaigns which rely on evaluation) to propose merges to submitting individuals and teams.

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The screenshot displays the EUNICE platform interface. At the top, a progress bar shows stages: Submission, Discussion (active), Evaluation, and Implementation. Below this, a discussion thread titled "I would like to Discuss Start-Up Entrepreneurship for Students. (#3494)" is shown, dated 09/09/2024. The thread content asks, "How can I best support Start-Up Entrepreneurship for Students?". To the right of the thread, there is a "Recent Ideas" section highlighted with a red box, listing several ideas with their respective IDs and engagement metrics (likes and comments). The ideas listed are:

- I would like to discuss research to business! (#3495) - 0 likes, 0 comments
- I would like to discuss research to business! (#3495) - 0 likes, 0 comments
- International Cooperation Incubators for EUNICE University (#3442) - 2 likes, 2 comments
- Idea collection - How can we encourage external partners such as companies to be more involved in EUNICE/REUNICE activities? (#3416) - 6 likes, 6 comments
- PROGRAMME CANALETTO - BILATERAL EXCHANGE OF SCIENTISTS (#3490) - 0 likes, 0 comments
- AI : past and present (#3486) - 0 likes, 0 comments

Figure 5 – Case matching feature

The third use case of “Funding track and matchmaking” is difficult to implement in the way it was described in D2.3. However, the platform can support the mechanism for matching start-up / spin-out founders to funding through the use of campaigns as e.g. an exhibition vitrine for funders, or as a way for founders to get instructions on how to apply for grants and/or vouchers (or other incentives) put out by local governments. The vitrine example refers to a static campaign, in which founders and funders have access.



Founders submit their idea to the campaign. The idea would represent their start-up. Funders then are able to peruse the campaigns and set tasks to the different start-ups to prepare for potential discussion rounds. Thus, founders in some way would be campaign managers. For the campaign to function as an instruction guide, the system manager would again need to expand the workflow to include the phases required to build up an application to a grant. From there different tasks could be matched to different phases. This is designed to be a theoretical example, and is a non-exhaustive way to describe potential work arounds based on the D2.3 definition.

3. Piloted Use Cases

In this section we discuss the use cases that have been piloted. We have sectioned this according to the structure presented in Figure 1.1. This split also facilitates the understanding of who the audience for specific campaigns representing use cases were.

3.1. Campaigns on the University of Vaasa Subsystem – “Catalyst”

The following use cases were tested with the test audience of university of Vaasa staff members: Idea Collection, Invention Disclosures, External Campaigns, and the Incubation Process Use Cases. The University of Vaasa and partners covered use cases from all three categories – internal, external, and innovation.

In the first category, idea collection, targeted the staff of the university of Vaasa. This campaign was pre-empted by an “offline” version of the campaign. The topic of the campaign was how universities, local actors, and the city could improve talent retention in the region. The offline version of the campaign served to “seed” the campaign – i.e., create ideas to give users an idea of what type of ideas are acceptable and inspire them to submit their own.

The second internal use case that was piloted in the Catalyst subsystem was the invention disclosure process. The process of setting up the campaign in the system meant that we validated the over-arching (offline + offline) workflow. After discussions with lawyers and editing of the idea submission forms, the invention disclosure process campaign is up and running. This is a successful pilot of the invention disclosure in that it validates the implementation of such a process in an online environment while automating some of the functions.





Continuing with the external campaigns category, we piloted three campaigns with two different partners. The first partner (Wasa Innovation Center - hereinafter, WIC) wanted to have better access to the researchers to facilitate collaboration between themselves and the REUNICE alliance. As a result, one of the external campaigns (on the Catalyst subsystem) was designed to pilot this collaboration model. The Research Services team took charge of all the marketing and collaboration details with WIC in order to ensure that all the topics of collaboration were presented to the researchers. The second campaign that we have piloted with WIC relates to the annual event that WIC hosts – the Wasa Future Festival (WFF). The WFF is always a forward-looking event in which leadership, collaboration, and concrete actions are established for the short- to mid-term future. The campaign here covered two use cases in one. The first is idea collection, where the campaign functioned as an open call for sessions to be hosted during WFF. The second use case covered is the external campaign. Here the platform itself functioned as expected. Through the campaign, new sessions were submitted to the campaign and made their way into the official WFF program.

The third external campaign that the University of Vaasa hosted on the Catalyst subsystem was a call for contributions to Energy Week. Energy Week is an event hosted and organised by several industrial partners who are a part of the energy cluster in Vaasa. Here the call was opened for the Research Exhibition and University stands. This allowed us to further pilot features of the platform including “categories” for submission. In which the different parts of the call could be outlined by the submitter. This functioned well as all proposals were clearly labelled and categorised.

When piloting external campaigns, we noticed that the users on the EEP and Catalyst subsystems were segregated. This presented the need for work-arounds. The functional options for work-arounds are: a) host the campaign on the external subsystem so that our external partners could have access to it or b) coordinate meetings in person to discuss status updates regarding the campaigns with the external partners. For all three campaigns involving external partners that were run on Catalyst subsystem we chose to use workaround b). This worked well in the cultural context of Vaasa, and prevented the requirement of all university employees having to create a second account to view the campaigns in the external subsystem. This was extremely useful in understanding the virtual mobility limitations of the platform. Where decidedly, the current format fell short. We discuss this in further detail in section 4.

The University of Vaasa also piloted the incubation process at a workflow level, where a new conceptual workflow was constructed, ready to take into use.

Overall, the REUNICE alliance contributed and completed pilots in Idea Collection, Invention Disclosures, External Campaigns, and Incubation Process use cases in the



Catalyst subsystem. The results from these pilots were that the platform does work for all these use cases and that for those that might struggle with adoption, extending the pilot period would be a relevant solution.

3.2. Campaigns on the REUNICE Subsystem – Expertise Exchange Platform (EEP)

In this section we discuss the use cases that were tested in the wider REUNICE alliance context. This context is more challenging from the get go because within the University of Vaasa, the REUNICE Team did not have direct access to any target audience. However, in the broader alliance context, a minimum amount of independence and initiative was required from allies. The use cases tested were: Idea Collection, Internal Process Improvement, External Campaigns, Community Creation, Specific Campaigns, and Incubation process.

To kick off the EEP subsystem we launched an idea collection campaign and pilot. This worked flawlessly from a technical standpoint. Different partners submitted different ideas on how the platform could be used. Moreover, the “always open, random ideas” campaign was also used early in the adoption.

The Internal Process Improvement campaign is one of the use cases that the REUNICE alliance piloted only on the alliance-wide subsystem. This pilot was executed by mobilising WP2 team members at partner universities and by making a connection to REUNICE WP4. Wanting contributions from the alliance, this campaign aimed to get materials and support on how to improve the internal process of communication. The materials and support came in the form of an inclusive communication charter. The campaign was designed and run entirely by the Alliance, showing that the support systems within the alliance around the system operate satisfactorily. Additionally, the new inclusive communication charter was drafted in a collaborative manner with the input provided from the platform.

The Alliance also piloted an external campaign on the platform. Where local partners of alliance members were able to collaborate with REUNICE universities on the platform. The external campaign consisted in collaborating on calls that were relevant to both the REUNICE Alliance as well as external partners.

The external subsystem of the platform also allowed the piloting of the Community creation use case. The community creation involved different partners creating different communities for different purposes. These communities involved vice-rectors for research and research services staff respectively. These campaigns enabled the





interaction of the different selected communities across universities with personalised invitations and curated guests lists. These targeted campaigns could also be considered as limited access campaigns as these are exclusive communities, and external actors who wish to be a part of them can be added to them. Within the communities, the campaign owners can operate as moderators of the conversations. New ideas represent new topics or new conversations, and replies indicate a “thread” of discussion. The community creation pilots also received strong support from a vice-rector of research from one of the Alliance universities.

The alliance also piloted the use of the platform for collaborative design of an AI-related Summer School planned for 2025. Here, again, the alliance designed and ran the campaign in a decentralised manner, with several partners contributing in different ways. This campaign therefore could be categorised as a middle ground between a specific campaign and an internal campaign (both in the internal campaigns category with respect to the Alliance). In this campaign, the campaign owners also operated as moderators of ideas and of conversation. This campaign is open to all, but specifically targeted AI experts, as specific invitations can be sent out as soon as new AI experts join the platform.

The Alliance further piloted the incubation use case in the external subsystem. For the pilot, only students from the University of Vaasa were participating. This allowed for a more controlled environment to test the incubation capabilities of the platform. Here, the workflow was not modified, but rather codified internally. The campaign was used as a way for the University of Vaasa to track the progress of start-ups that were part of the incubation program. Here, teams were able to see tasks assigned to them at different stages and moderators were able to move them along the workflow. Different stages of the workflow are codified to indicate different parts of the incubation process. This campaign is promising and could be expanded if needed.

Overall the external subsystem allowed the REUNICE Alliance to pilot the platform within and beyond the alliance, including a student related use case. The pilots conducted in the Alliance-wide subsystem included pilots in all three use case categories. More specifically, idea collection, internal process improvement, and specific campaigns were tested in the Internal category. In the external category limited access campaigns, and Community creation campaigns were tested. In the Innovation campaign the Incubation process was tested.



3.3. Pilot Support activities

To support the pilot, several auxiliary activities were conducted. These included:

- Internal consultation sessions.
- Consultation sessions with platform providers, covering agendas of:
 - Feature and platform development
 - Operative support,
 - Concept validation,
 - Campaign development,
 - Leadership guidance.
- Proposed webinars.
- Campaign Manager and Creator guides.
- Quick Start Guides.
- Sustainability activities.
- Co-design of workshops to seed campaigns.

Internal consultation sessions were launched and proposed via e-mail campaigns as well as blog post releases from WP2 and WP6. In these campaigns, WP2 leaders made themselves available by suggesting times that could be booked in order to discuss and consult on various topics regarding the platform. Consultations ranged from “campaign scouting” – i.e., the process of understanding when and where a campaign might be relevant – all the way to campaign implementation.

Consultation sessions with the platform providers, Qmarkets, covered several agendas. These helped ensure the operative and functional form of the platform at all times.

Webinars were planned and proposed on several occasions to ensure equal opportunities for all users to learn how to use the platform. In addition to the webinars, user support included the development of customised guides for : Campaign Managers, Campaign Creators, and a quick start guide (for “regular” users).

Workshops were co-designed in a tri-lateral combination, with validation from the platform providers and the campaign managers requesting workshops. All of the workshops were designed to be online and hybrid. Additionally, these workshops included the best practice principles of using seed ideas for each campaign.

Throughout the piloting phase, the sustainability of the platform was ensured through regular meetings with leadership, both within the alliance and beyond. These meetings usually targeted potential calls that could be used to sustain the budget required to keep the platform up and running for the entire alliance. In the end, sustainability was





ensured through the next phase of the EUNICE project by including the platform in the EUNICE4U proposal.

4. Challenges and Lessons Learned

This section is structured with two subsections. In section 4.1 we exclusively deal with the challenges we faced, how we addressed them, and how they impacted the decision to continue with the platform in its current set up until the end of the REUNICE Project. In section 4.2, we discuss how the piloting so far can help shape the potential for adopting a similar platform but with a different set up. Additionally, we also discuss the sustainability of the platform solution in this section.

4.1 Best Practices to address Challenges

One of the main challenges faced was adoption. Adoption is highly impacted by the lack of execution of best practices. We also noticed that we should change the service approach to a more centralised model, so as to improve the use of best practices.

In section 3.1 and 3.2. we briefly discussed the use of seed ideas as best practice. This was a best practice which was underutilised. This may have affected some campaigns more strongly than others. In new campaigns, having seed ideas as examples of what a submission could look like may have motivated additional submissions. Furthermore, seed-ideas, whether real or artificial would have also improved the content density of the platform. The availability of content may have also engaged visitors in a different way – for example commenting and otherwise interacting with the ideas.

Another best practice that was lacking was strong campaign coordinators. This may have derived from the current set up, where we idealised a decentralised ownership form. However, there were several opportunities and proposals to host sessions to clarify the roles within campaigns. The lack of campaign coordinators may have also affected the number of campaigns – if the platform was not advertised as an enabler for *other projects* then, the lack of dissemination may have inhibited the number of campaigns.

The fourth best practice that was recommended by the platform providers was to have clear timelines for campaigns, including pre-campaign marketing, intra-campaign marketing, dissemination, and communication, and post-campaign when the campaign is over. However, within the Alliance we aimed to keep the campaign creation low threshold and therefore not impose such an additional requirement to run pilot campaigns. This has benefits and drawbacks. The main benefits is that we managed to pilot almost all the use cases. The main drawback is that campaigns' purpose and





timelines may have been unclear – thus potentially inhibiting the call to action of campaigns.

The fifth best practice that was not applied was having workshops to help people submit (seed) ideas. These workshops were repetitively offered, however not executed. However, the platform provider outlined that these workshops would be the most effective way to create accountability, seed ideas, and a swathe of other positive effects for campaigns.

These best practices could have contributed to a more successful piloting of the platform. The key lesson here is that in future, workshops should be mandatory, as these would also help in contributing to seed ideas, thus implicitly addressing three issues at once: first, the seed-ideas could be drawn from the workshop. Second, the advertisement of the workshop as well as the campaign together would create awareness of the platform, the campaign, and the workshop. This partially addresses the marketing, dissemination, and communication best-practice identified. Lastly, the workshop itself is a best practice. Thus, making it mandatory, would address the best practice itself. It must be noted that UVA, as the WP leader of WP2 offered these workshops, and can do so in the continuation phase of the platform until the end of the project.

Another challenge is that the situation has created a substantial difference in expected service set up within the Alliance versus realised service set up. In the desired service set up, UVA and PUT as work package leaders would have provided the training and technical support for campaigns and pilots. UC and all WP6 team members from each university would have provided dissemination and communications support around pilots and campaigns. The desired set up relied on WP2 participation from all allied institutions from within and beyond the REUNICE project. This may have led to lower participation. Additionally, for those users outside of the project, challenges in understanding the purpose of the platform might have manifested. Unfortunately, participation was generally limited to people within the REUNICE project. This led to a reality in which UVA had to actively participate around most campaigns, and had to do a lot of the preparatory and campaign creation work, as well as supporting the WP6 function. Figure 6.1 demonstrates the desired service set up. Figure 6.2 illustrates the actual service set up. Per se, it is important to note that the real service set up does not hinder the piloting, but it creates different expectations, and again widens the responsibility scope of UVA, which increases the need of UVA resources for the piloting of the platform.



The lesson learned here is to set out clear expectations and provide additional support on how to get to these expectations by ensuring that these expectations are clearly communicated.

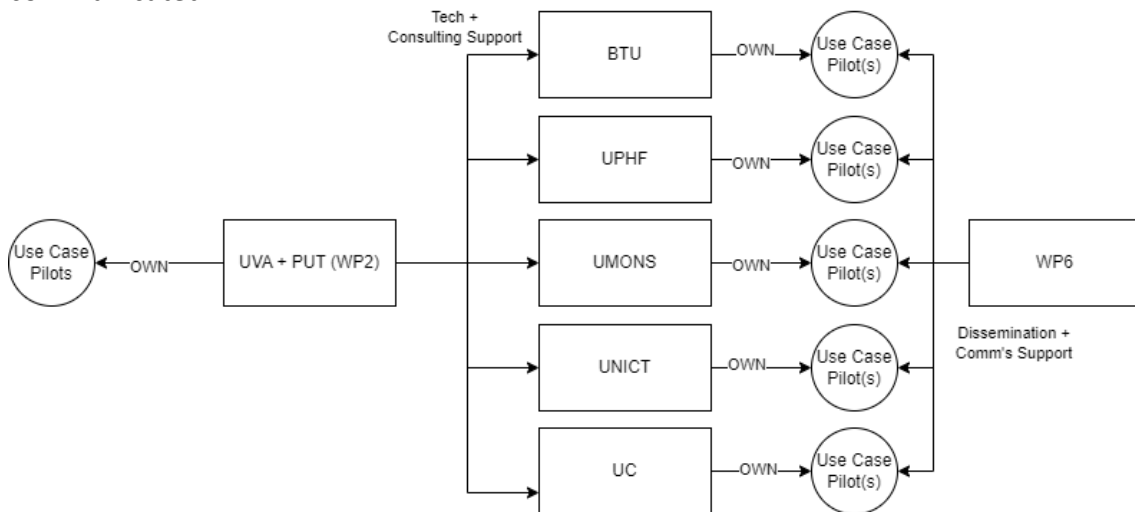


Figure 6.1 – Desired Service Set-Up

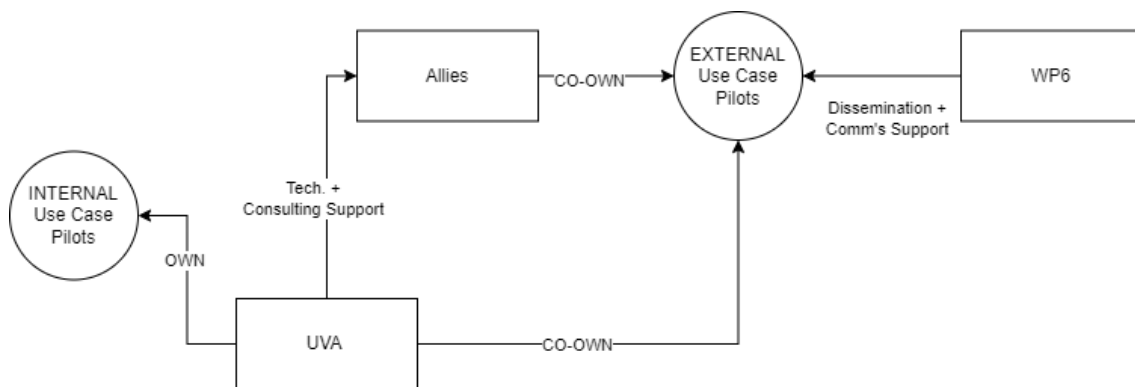


Figure 6.2 – Current Service Set-Up

To conclude this section, it is important to outline that the piloting has been successful. However, moving forward, adjusting expectations and ensuring that the ownership around campaigns and the use of best practices could increase adoption rate. To do this, a more centralised ownership approach should be implemented, including the strict ownership of WP2 for every use case so that a workshop may be applied to every use case to ensure seed ideas, participation, and content co-creation.



4.2. Sustainability of the Platform Solution

So far, we have discussed at length the current set up and piloting of the platform. Based on these findings, task 2.5. from WP2 is designed to continuously evaluate the platform to understand the sustainability as well as improving and developing the features that it currently offers. In this section we evaluate the platform as well as the developments and features which have been added based on the feedback from the piloting. We first use a qualitative analysis to help provide a holistic picture of the decision to continue using the platform until the end of the REUNICE project period. In the last part of this section we discuss the addition of potential EU institutions and universities to the platform, as this is one of the goals of task 2.5.

This qualitative analysis takes into consideration the challenges mentioned in section 4.1 and helps justify the decision to only accept the short extension proposal from Qmarkets.

First and foremost, the majority of piloted use cases was satisfactorily completed. However, out of these, only a few have received the traction and participation they needed to complete a valid quantitative analysis. Thus, it is crucial that the pilot continues for two reasons: first, so that the remainder of the use cases may be tested more thoroughly. Second, so that the existing campaigns may be re-launched using the centralised approach described in the conclusion of section 4.1.

Secondly, some features and functionalities in the platform have been modified at the tail end of the spring semester. These changes include the log in and sign up way for the external system, and a community feature to make it easier to contact users on the platform. Because these changes happened late in the spring semester, the timing for piloting them has not been realistic. Thus, it should be tested in the fall semester. This would be in line with the description of Task 2.5.

Thirdly, the opportunity to further develop the platform through the enablement programme with Qmarkets. Despite the slim success of the platform thus far, including an enablement program is an opportunity that the alliance should not shun. The enablement program with Qmarkets is an opportunity for joint development of the platform but also the Qmarkets product range. With closer collaboration, we could influence the way Qmarkets work with universities, mould the product to our needs, and strategically position ourselves, if we want to scale up operations after the REUNICE project. Additionally, the enablement program could and should help the university of Vaasa with the more centralised approach.





Lastly, we must consider that the outreach to other European universities has only started. In addition, with the EUNICE4U coming along and allowing us to expand the alliance, we have the chance to invite further partners, including Viseu Technical University, University of Peloponnesse and Karlstad University.

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5. Conclusion

This report has covered task 2.4 of REUNICE WP2 by describing the platform structure and mapping the conceptual use cases to the platform in a more concrete way than was done in D2.3. We then described the piloted use cases, namely: The University of Vaasa completed pilots in Idea Collection, Invention Disclosures, External Campaigns, and Incubation Process use cases. The wider alliance completed pilots in Idea Collection, Internal Process Improvement, External Campaigns, Community Creation, Specific Campaigns, and Incubation process. The results from these pilots were that the platform does work for all these use cases, but that there are some challenges in implementation, platform set up, culture, and adoption.

The main challenge faced by the platform is technology adoption, with most allies having a slow adoption response to the platform. This will have to be resolved by proving the value of the platform by adding additional content, hence relevance, and proving the value of the platform in this way. We have shown that the platform has technically performed as expected, and is functionally sound. As a result, with the lessons learned and the challenges discussed in section 4, it is clear that a more centralised and best-practices driven approach needs to be adopted for the pilots to be concluded with more substantial results. Therefore, our proposal is to continue using the platform, but engaging users by including “seed ideas” to create relevant content to engage with for upcoming campaigns. Additionally, the engagement should also involve the use of workshops to encourage campaign managers to invite the target audience to use the platform directly during the workshop. The centralised element of this approach is that the WP2 leaders will be more directly involved in the planning, execution and support of the workshops and campaigns.

In this report we have also discussed Task 2.5. dealing with the sustainability, scalability and continuous evaluation of the platform. We have shown that we have been responsive in the requests from partners and have made it easier to access the external part of the platform. However, with the rather limited content available in the external subsystem, we will continue piloting this with the more centralised approach proposed in this report. Additionally, the involvement of the new partners, who can be considered as new and external EU institutions from a REUNICE perspective needs to be piloted further.

Overall, the decision to continue to use the platform throughout the REUNICE project in a piloting phase seems justified based on several factors, including the opportunities extended by Qmarkets via their enablement program.



Appendices

Appendix 1 – Help Documentation Delivered

The unique value add of these documents is that each one is prepared using screenshots of the Platform as it is seen by the users. Therefore, the branding, the campaigns, and all the layouts feel familiar to the user. This addresses the problem that although generic guides and support materials are available, since they are generic they are not as relatable or easy to follow. If you wish for a copy of the materials, please contact riccardo.notarangelo@uwasa.fi

The “Campaign Creation Guide”

The campaign creation guide is a document that was designed to be shared within the alliance to people nominated as campaign managers in the different institutions. The guide covers the basic elements of campaign management as well as campaign creation.

The original document is available on request. It is not included in this report for length and privacy reasons.

How to edit an idea

This PowerPoint presentation serves as a “quick learning tool” for new users who might need additional guidance in the understanding of how to edit an idea they have submitted.

The original document is available on request. It is not included in this report for length and privacy reasons.

The Quick Start Guide

The quick start guide was designed for all external users coming from within the REUNICE alliance. This document was shared in e-mails to the consortium to distribute further. The guide covers how to create an account, how to sign in using an existing account, a guide on how to make contributions, and other forms of contribution (e.g. commenting, liking, sharing, and subscribing to ideas).

The original document is available on request. It is not included in this report for length and privacy reasons.



This project has received funding from the European Union's Horizon 2020 Research and Innovation Programme under grant agreement No 101035813

Appendix 2 – Additional Platform Presentation

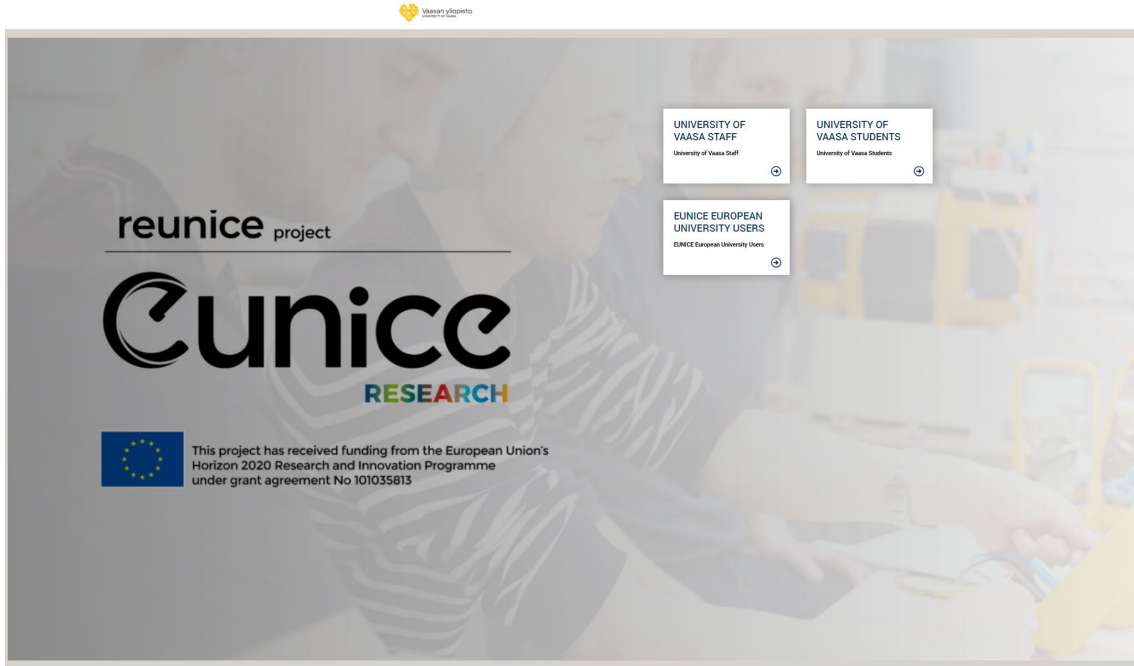


Figure 1 – log in screen.





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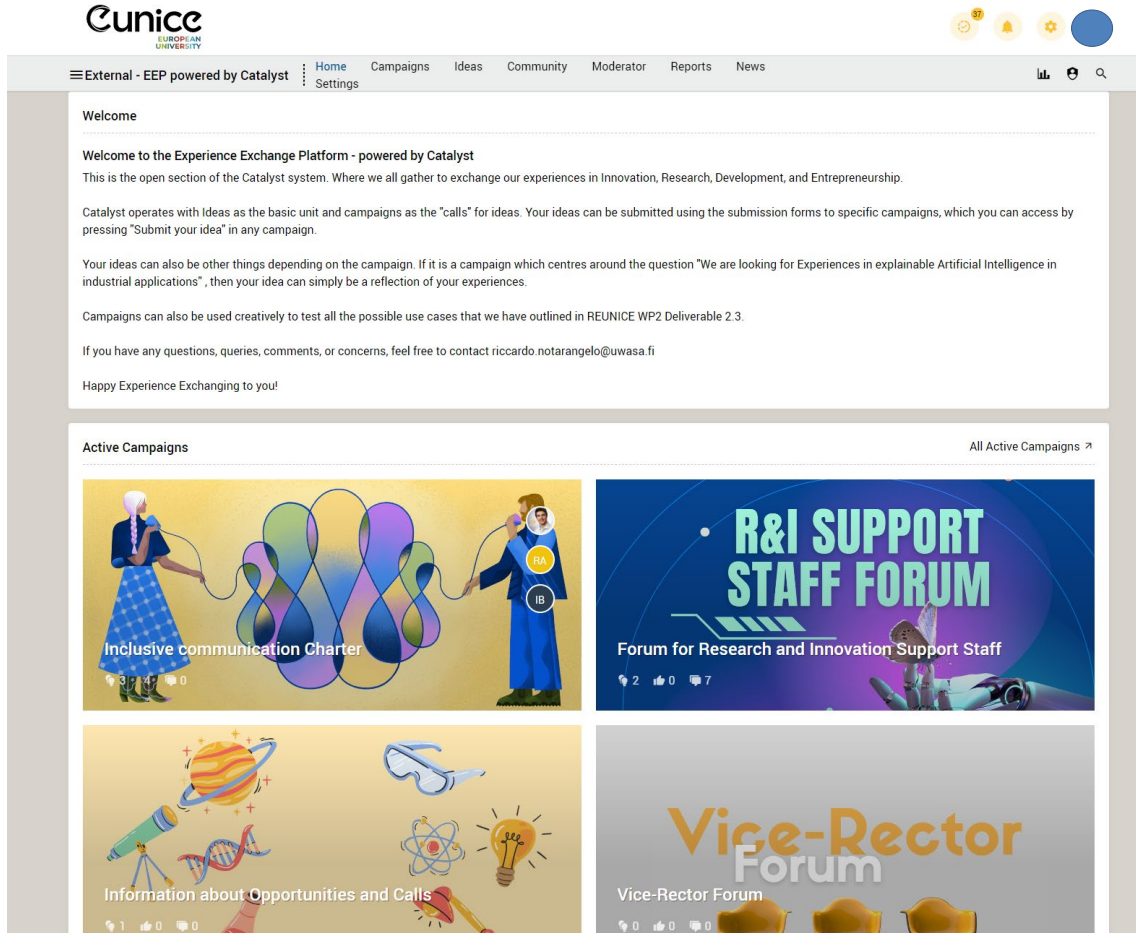


Figure II – The EEP's Home Page





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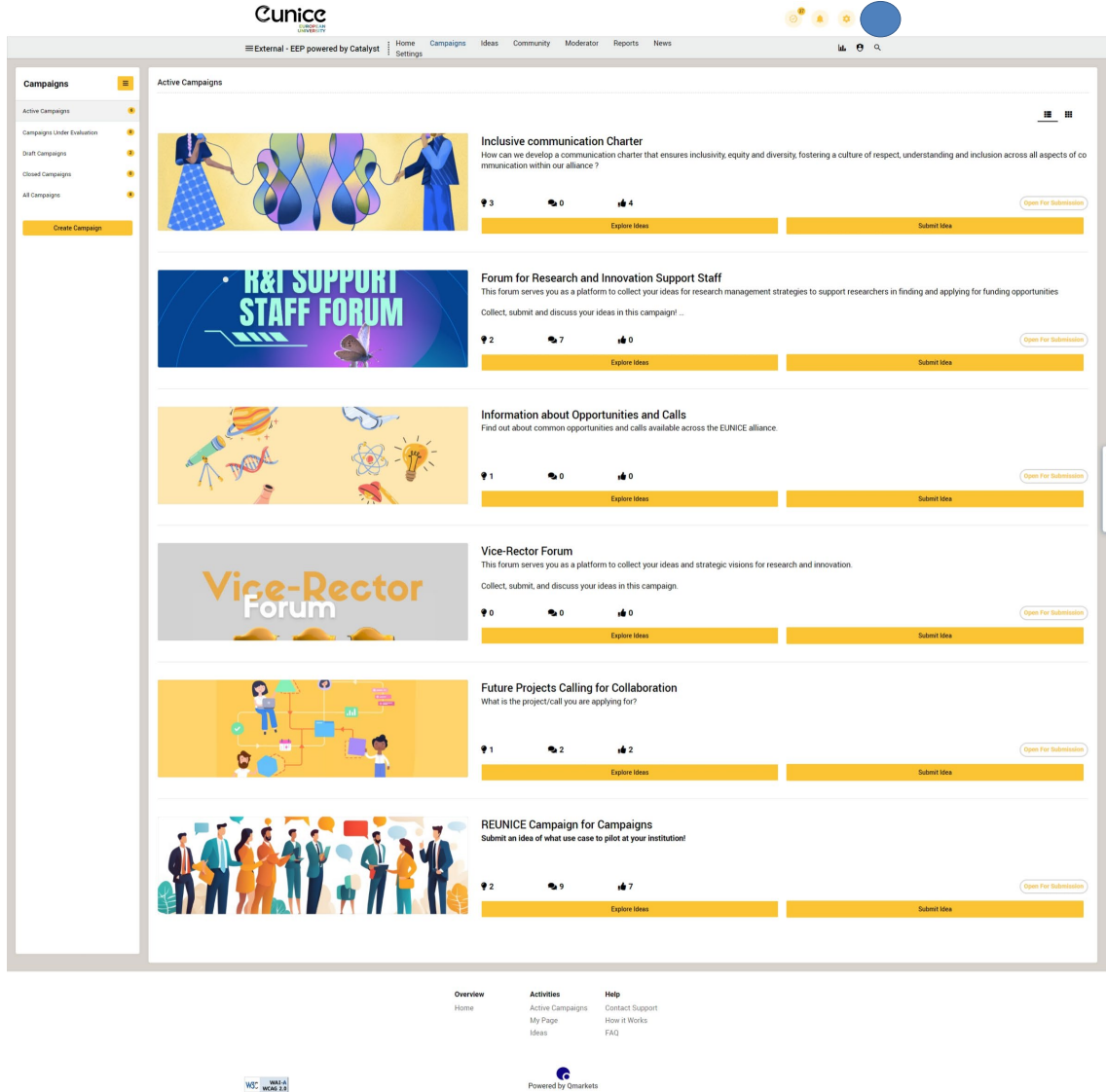


Figure III – The EEP's Campaigns Page



This project has received funding from the European Union's Horizon 2020 Research and Innovation Programme under grant agreement No 101035813

The screenshot displays the 'Ideas' section of the EEP platform. At the top, there is a navigation bar with 'External - EEP powered by Catalyst' and various menu items like Home, Campaigns, Ideas, Community, Moderator, Reports, and News. The main content area shows three idea submissions, each featuring a lightbulb icon, a title, a submission date, and a voting mechanism.

- Idea 1:** "I would like to discuss research to business! (#3495)" submitted on 09/09/2024. The question is "How do your R2B processes work? What challenges have you faced?". It has 0 votes.
- Idea 2:** "I would like to Discuss Start-Up Entrepreneurship for Students. (#3494)" submitted on 09/09/2024. The question is "How can I best support Start-Up Entrepreneurship for Students?". It has 7 comments and 0 votes.
- Idea 3:** "Inclusive communication charter - some feedback :) (#3493)" submitted on 07/08/2024. The question is "Thank you for your work [redacted] I've read the document and added some comments :)". It has 5 feedback mechanisms and 1 vote.

Figure IV – The EEP’s Ideas Page



The screenshot shows the 'Community' page of the EEP, powered by Catalyst. The page features a search bar for users and a grid of 20 user profiles. Each profile includes a circular avatar with initials, a 'Newbie' badge, and statistics for points, comments, votes, and ideas submitted. A dropdown menu is open over the first profile, showing these statistics. On the right, a 'Filters' sidebar allows users to filter by Department, Last accessed, Created, Role, and User type. The top navigation bar includes links for Home, Campaigns, Ideas, Community, Moderator, Reports, and News.

Figure V – The EEP's Community Page

