Deliverable 3.1: Trailblazer LL management, communication and engagement handbook

WP3

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26/6/2024	2.1	Lamprini Papafoti, Catarina Sales – FACTUAL	Draft deliverable after internal review
27/06/2024	2.2	Eglantina Dani - FACTUAL	Deliverable after quality check

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Abbreviations and Acronyms

ACRONYM	Description
BIGMS	Business innovation and governance models
F-LL(s)	Follower Living Lab(s)
T-LL(s)	Trailblazing Living Lab(s)
UCs	Use Cases
WP	Work Package

Background: About the metaCCAZE project

Transport is the second largest source of greenhouse gas emissions (GHG) and accounts for more than 30% of the total energy consumption. A series of global crises highlight the need for a significant shift from conventional vehicles to well-integrated, energy efficient, connected and automated passenger and freight services that meet the ambitious EU goals. To do so, a paradigm shift is required in the operations of electric vehicles that tackles their inherent vulnerabilities, including: the electric fleet-grid supply mismatch, the slow charging times, and the vehicle delays at charging stations. This requires automated charging processes, intelligent scheduling operations and matching to the grid, interconnectivity and automation of transport operations, and a shift from private cars to shared modes.

metaCCAZE is a Horizon Europe MISSION project co-funded by the 2Zero, CCAM and Cities' Mission partnerships. It participates in the CIVITAS Initiative, an EU-funded programme working to make sustainable and smart mobility a reality for all and contributes to the goals of the EU Mission Climate-Neutral and Smart Cities.

The metaCCAZE project aims to revolutionise mobility in European cities, serving both passengers and freight, with innovative electric, automated, and connected solutions designed to make transportation smarter, net zero, and more efficient for all. It builds on the expertise of 44 partners from 12 different European countries and contributes to the green metamobility era that the Green Deal, 2ZERO, CCAM, Cities Mission, CIVITAS and other EU initiatives aim to reach by 2030. In the vibrant streets of four trailblazer cities – Amsterdam, Munich, Limassol, and Tampere – metaCCAZE implements, tests and demonstrates cutting-edge technologies and services that support shared zero emission mobility solutions for people and goods, contributing to climate neutrality. Successful technologies and activities are transferred and implemented to six Follower Cities – Athens, Krakow, Gozo, Milan, Miskolc, and Poissy, Paris.

metaCCAZE organises a series of metaDesign activities and develops a toolkit called metaInnovations. This toolkit is pioneered in passenger and freight services (public transport, on-demand minibuses, bike and scooter sharing, deliveries) and related infrastructure (mobility and logistics hubs, traffic management centres, charging infrastructure, transport and energy integration) and widely demonstrated in our four trailblazer cities for a whole year. Successful metaInnovations and metaServices are transferred, implemented and demonstrated in the 6 follower cities for up to 8 months, to ensure their transferability and resilience potentials.

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Executive Summary

This deliverable provides comprehensive guidelines for the management, communication, marketing, and engagement activities essential for the successful development and operation of Trailblazing Living Labs (T-LLs). It aims to facilitate effective management and collaboration within the T-LLs, emphasizing the roles and responsibilities of all stakeholders and outlining processes necessary for seamless cooperation among T-LL members. Critical risk management procedures are also detailed to mitigate potential challenges.

As the first document in the series of Work Package 3 deliverables, this document is fundamental for the execution of tasks within WP3. The need for this deliverable arises from the critical importance of effective stakeholder engagement and communication in ensuring the successful uptake and public acceptance of metaServices and Use Cases.

A set of integral elements for communication, marketing, and engagement activities, highlighting procedures to ensure early participation of citizens and stakeholders were identified. Practical steps for formulating local communication and marketing strategies are presented, promoting the effective dissemination of information and fostering public engagement. These guidelines are particularly relevant for the implementation and evaluation phases of the T-LLs, serving as a critical resource for T-LL partners.

1. Introduction

1.1. Objectives of the Deliverable

This deliverable provides guidance on the procedures for the management, communication, marketing and engagement activities that are crucial for the successful operation of the Trailblazing Living Labs (T-LLs). The content of this deliverable aims to ensure a smooth coordination and execution of co-design processes, active participation of stakeholders and citizens, and the effective implementation and demonstration of the Use Cases (UCs).

By providing this framework, D3.1 aims to facilitate an effective management and collaboration within the T-LLs. The primary target group for this guide includes all the T-LL partners, as well as the remaining relevant partners involved in the metaDesign and cross-fertilization activities.

1.2. Structure of the Document

This deliverable begins with an introductory chapter, providing context on its purpose and intended audience and setting the stage for the subsequent sections. Following the introduction, the document is divided into two main sections.

- The Management Structure and Processes chapter that presents the roles and responsibilities within the management structure of the T-LLs. It includes a Gantt chart delineating project timelines and milestones, along with protocols for conducting effective meetings to foster collaboration among the T-LLs.
- The Communication, Marketing & Engagement Activities chapter that presents guidelines for stakeholder engagement and communication activities within the T-LLs. This section offers insights and principles for fostering active participation of citizen and stakeholders in the T-LLs and implementing effective communication strategies.

Finally, the document ends with a conclusion chapter where a summary of the main outcomes of the deliverable are presented.

1.3. Relation to Project Documents

This document is the first one in the series of Work Package 3 (WP3) deliverables. This Handbook has no legal function and does not replace any of the written content of the Grant Agreement. This deliverable is aligned with the deliverable D6.1 - Project handbook, inception, quality and risk management in terms of management structures and risk management procedures. It is also anticipated that it will serve as a basis for the deliverable D4.1 which has the same objectives as D3.1, but is intended to guide the management and engagement of the Follower Living Labs (F-LLs). The next deliverable that falls under the remit of WP3 (D3.2 - Trailblazer Living Labs: co-design activities, implementation preparations, monitoring plan) will also use this deliverable as a starting point, as it will aim to evaluate the metaDesign activities that will take place in the T-LLs. It will also provide a detailed plan for the implementation of the demos in the T-LLs and assess the need for potential adjustments.

1.4. Overall Approach

This deliverable was drafted by the partner leading the WP3 (FACTUAL). For the drafting of this deliverable, the WP3 leader identified some key principles that should be followed for the effective management and stakeholder engagement processes of the T-LLs. Moreover, the authors consulted the Grant Agreement, the Deliverable 6.1 - Project handbook, inception, quality and risk

management, to ensure that all timelines and processes suggested here are aligned with these key documents. The T-LL partners (leaders and supporters) as well as other partners who are leading activities related to this deliverable were consulted throughout the drafting of this document. This approach aimed to ensure that all processes, tools and responsibilities described here are aligned with the vision of the T-LLs and other partners who design or influence the metaDesign and communication activities of the T-LLs.

2. Management Structure and Processes

2.1. Introduction

This chapter focuses on the management structure and processes within the T-LLs. It starts by introducing the general concept and principles of the metaCCAZE Living Labs. Next, it outlines the roles and responsibilities of all involved partners in the T-LLs. To provide clarity on project timelines, the chapter addresses the main activities, their duration, and how they are organised throughout the project. Additionally, it discusses management processes such as organising meetings involving all T-LLs and reporting requirements, as well as guidelines for managing the Living Labs effectively. Finally, the chapter presents the risk management process.

2.2. The metaCCAZE Living Lab concept and principles

The Living Labs within the metaCCAZE project are envisaged as vivid public, common spaces, which will foster all the elements, relationships, and processes required to design and evaluate the potential solutions and metaInnovations brought-up in the Living Labs. The Living Labs will follow a "think globally, act locally" approach which highlights the importance of global and European goals, while stressing the need for local applications of solutions.

An important characteristic of the metaCCAZE methodology is the crucial role of citizens and cross-sectorial stakeholders who continuously design and experience UCs to ensure the seamless and user-centric implementation of the metaCCAZE's solutions in the current ecosystems. Within metaCCAZE, user needs are taken into account since the first stages of the Living Lab development. The needs of citizens and other stakeholders are considered throughout the development of prototypes, the metaDesign and verification of UCs, as well as the evaluation of the demonstrated UCs and metaServices. The ultimate objective is to design and implement metaServices in the Living Labs that meet the needs of the citizens and stakeholders, to maximise the efficiencies and the positive impact on the cities.

In metaCCAZE, the metaDesigned UCs (from WP1) and metaInnovations (from WP2) are "infused" into services and infrastructure of the Living Labs, physically implemented, and demonstrated. The T-LL services include public transport, flexible on-demand transport, shared e-bikes, cargo bikes and e-scooters, deliveries, garbage collection, e-vessels and mobility credits. The Living Lab infrastructure includes mobility hubs, charging stations, park and ride facilities, bus stops, traffic management, data storage centres, curbside management and digital twins. The solutions are implemented and widely demonstrated for a year in the 4 T-LLs, allowing us to assess fluctuations in supply and demand patterns due to seasonal effects, as well as wider impacts.

2.3. Roles and Responsibilities

The management, communication and engagement activities of the T-LLs fall under the remit of the WP3). The WP3 plays a pivotal role within the metaCCAZE project by orchestrating and managing the setting up and implementation of the T-LLs. Within the context of WP3, stakeholder and citizen engagement activities are organised to facilitate the collection of essential data

required for the developments initiated in WP1. Additionally, WP3 implements the open solutions generated in WP2, updating and expanding services offered by the Living Labs while closely monitoring and evaluating their efficiency and impact. Furthermore, WP3 collaborates closely with the WP1 and WP2, to ensure a seamless flow of information and knowledge transfer. It acts as a bridge between the initial research outcomes and the practical applications of flexibly adjusted, open, and resilient solutions within the T-LLs. The ultimate aim of WP3 is the successful testing, infusion and demonstration of the project's innovations within the T-LL cities´ mobility ecosystem.
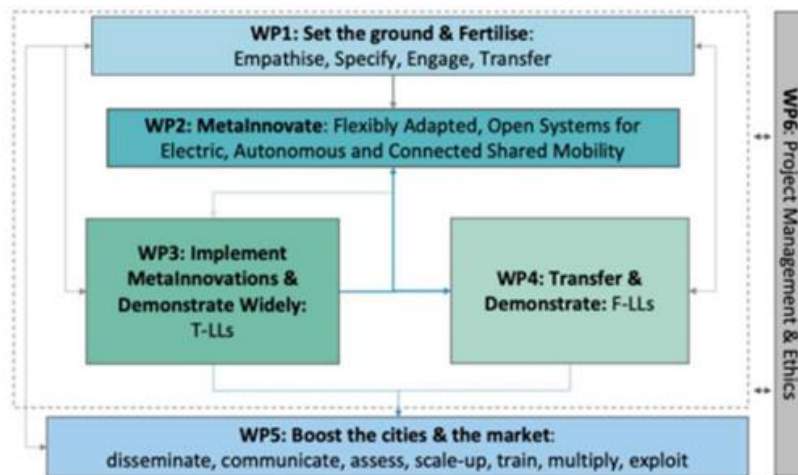
Figure 1: Overall Structure of the Workplan

The partners involved in the preparation and implementation of each T-LL and their respective roles are presented in the table below:

Table 1: T-LL Partners.

T-LL NAME	T-LL LEADER (AUTHORITY)	T-LL SUPPORTER	OTHER T-LL PARTNERS
Amsterdam	AMS	TUD	GAMS, ZOEV, TMAK, ARG, TNL
Munich	LHM	TUM	STR, B4B, SCSPS, SDAG
Limassol	LIMA	MLAB	EMEL, OXYG, NBBIKE, MSIS, NTUA
Tampere	TAM	TAU	REM

In metaCCAZE, each T-LL is overseen/led by a city authority (T-LL leader) that is supported by a research organisation (T-LL supporter) to ensure rigor in all research activities. The WP3 leader (FACTUAL) serves as a Living Labs manager, while the Social & LL Innovation manager (MaaSLab) serves as the Living Labs Supporters manager, coordinating and helping the supporters. Another important role is assumed by the partner leading task 3.6 (TUM) who is leading the overarching monitoring and evaluation activity, implementing the Standardized Evaluation Framework (SEF) developed in WP1 to collate insights from the monitoring and evaluation from the four T-LLs.

Therefore, the roles and responsibilities for each partner involved in the T-LLs can be described as follows:

T-LL leaders

The role of the T-LL leaders includes the following project management procedures:

- Convening and chairing periodic meetings with the T-LL metaCCAZE partners: All T-LLs have set up such regular Living Lab meetings, where all the metaCCAZE partners of the Living Lab meet to coordinate on the tasks each Living Lab has to implement. It is important to maintain a flexible approach to the planning of meetings and communications and adjust the frequency of meetings as needed to accommodate project requirements and ensure effective communication among stakeholders.
- Assessing risks that arise within their T-LLs: The T-LL leaders hold the responsibility for identifying and assessing risks in relation to the Living Lab implementation. They are tasked with proposing mitigation strategies to address potential challenges. The full process for risk management is outlined in section 2.4. of this deliverable.
- Facilitating and delivering the metaDesign activities with stakeholders and citizens: T-LL leaders will organise the metaDesign activities, ensuring active engagement and collaboration among stakeholders and citizens. This involves fostering an inclusive and participatory environment to get feedback and input from relevant actors.
- Promoting the metaServices through marketing campaigns: This includes raising awareness about metaServices among relevant stakeholders and potential users, highlighting their value proposition, and driving adoption and usage.

T-LL supporters

The T-LL Supporters play a crucial role in the implementation and evaluation of the T-LLs. Their main activities include:

- Providing scientific Support to the Living Lab: T-LL supporters offer scientific expertise and guidance to ensure the effective execution of the activities. This involves assisting in the design and implementation of research methodologies, data collection instruments, and analysis frameworks, tailored to the specific needs of each T-LL.
- Monitoring and evaluation of the T-LL activities: T-LL supporters make sure that there are tools (questionnaires, sensors etc.) in place to monitor and assess the progress and outcomes of T-LL activities to ensure alignment with the project and the T-LL objectives, as well as to be able to quantify the impact and populate the Standardized Impact Evaluation Framework (from WP1) and the Inception Report (from WP6).
- Facilitating the information flows between WP1 activities and the T-LL they are supporting: This involves making sure that the information required by WP1, and the templates provided by WP1 are populated by the Living Lab partners, disseminating relevant updates, guidelines, and resources from WP1 to T-LL stakeholders and vice versa.
- Collecting and analysing the data from the metaDesign activities ("LL1" to "LL5" metaDesign activities, as described in the Grant Agreement): This includes collating insights from stakeholder engagement sessions, workshops, and metaDesign events to support decision-making and strategy development within T-LLs.
- Delivering the surveys for Social embracement, incentivisation and behavioural change exploration (Task 1.5 or activities "SS1" and "SS2", as outlined in the Grant Agreement): T-LL supporters conduct surveys, oversee their distribution, completion and collection of responses, using data analysis to derive insights for the Living Lab planning and implementation. The target groups and sampling approaches for these surveys will be

determined once the final UCs are defined. The data collected from these activities are also used for the scope of the second bullet point above (monitoring).

- Participate in Cross-fertilisation & transferability activities ("CLL1" to "CLL5", as presented in the Grant Agreement) to foster transferability of the solutions from the T-LLs to the F-LLs.

WP3 leader (T-LLs manager)

The WP3 leader (FACTUAL) is responsible for the management and orchestration of the four T-LLs. As such, their responsibilities include:

- Bringing in the information from other WPs (particularly WP1 and WP2) to the T-LLs and providing feedback to these.
- Coordinating the activities across the T-LLs.

Social & Living Lab Innovation manager (Living Lab supporters' manager)

The Social & Living Lab Innovation manager (MaaSLab) covers scientific and social technical management related to WP1 and manages their implementation in WP3 and WP4:

- Ensuring effective implementation of WP1 activities in WP3.
- Overseeing the role of the supporters and ensuring an effective communication between the supporters and other relevant partners.

Task 3.6 leader - Monitoring, evaluation and lessons learnt

The Task 3.6 leader (TUM) is responsible for the monitoring and the evaluation of activities and demonstrations in the cities. Their main activities include:

- Collaborating with the Living Labs actors to make sure that the demonstrated services produce the data needed for monitoring.
- Streamlining, collating and cross-analysing data to facilitate comprehensive evaluations across T-LLs, although it must be noted that each T-LL supporter remains responsible for the monitoring, SEF implementation, and transferability indications of the T-LL they support.
- Collaborate closely with the Impact Evaluation Manager of the project (MaaSLab) to make sure that the outcomes of impact evaluation are communicated outside the metaCCAZE consortium.

For the specific case of the metaDesign and Fertilization activities both the Living Lab leaders and the Supporters play a crucial role. In the table below their role in each activity is specified:

Table 2: Leaders and Supporters Role in metaDesign and Fertilization activities.

metaCCAZE activity	T-LL Leader role	T-LL Supporter role
Living Lab's metaDesign activities (activities "LL1" – "LL5") Related to Task 1.2, Task 1.3 and Task 1.4	Leader in delivering the activity and arrange the data collection process	Leader for designing the data collection tools and requirements, and for analysing the data
Living Lab's metaDesign activities: Social embracement & behavioural change surveys (activities "SS1", "SS2"), Related to Task 1.5		Leader in delivering the activity and analysing the data

metaCCAZE activity	T-LL Leader role	T-LL Supporter role
MetaSkills Hub (training activities) – "MH2" Related to Task 5.6	Leader in organising the activity	Leader for the teaching material design along with ERTICO and TRT
MetaSkills Hub (training activities) – "MH3" Related to Task 5.7	Leader in organising the activity	-

2.4. T-LLs work plan and Gantt Chart

Figure 2 presents a Gantt chart outlining the tasks, deliverables, and main activities of WP3, along with identification of project milestones. As the Gantt chart demonstrates, the setting up of the T-LLs takes place from the M3 of the project to M18. This design and exploration phase, includes the metaDesign activities, which are further described below and the baseline social embracement surveys. From M19, the integration and testing of metaServices and metaInnovation begins within the T-LLs. Following the completion of this phase in M22, the main demonstrations and social embracement surveys along with the wider monitoring and evaluation activities begin. The demonstration lasts for 12 months, allowing us to observe and control for seasonality effects.

Figure 2: WP3 Gantt Chart

Beyond these phases and tasks, the T-LLs have important roles across metaCCAZE's main activities, particularly in facilitating metaDesign and cross-fertilization activities and as active participants in MetaSkills Hub (training activities). The main activities that each T-LL is involved in and are critical to secure co-design, participation and smooth implementation include:

metaDesign activities:

    a. *LL1:* **mini dialogues** – Each T-LL organises an event with selected stakeholders who are involved in the Living Lab's SUMP to discuss and specify their needs in terms of smart systems and services.

        i. Physical or hybrid workshops.

    b. *LL2:* **metaDesign use cases + business innovation and governance models (BIGMS)** – The T-LLs discuss the prototype UCs with citizens and stakeholders to prepare the metadesigned UCs that will be demonstrated in each T-LL. They also discuss the business model and the governance structure of each UC.

        i. Format: Physical or hybrid workshops + online questionnaires (if needed, if the duration of the workshops is too long and some information can be collected through questionnaires).

c. *LL3:* **metaDesign the metaServices with citizens** – Workshops are organised with citizens to discuss with them the characteristics that the UCs and metaServices would like to have in order to secure the maximum uptake of the metaServices, and also take insights about the topics the marketing campaigns should target.

    i.   Format: Physical or hybrid workshops.

d. *LL4:* **Validate metaDesigned use cases + BIGMS** – Discuss and verify the final metaDesigned UCs and their BIGMs in order the stakeholders to be informed about what UCs will be demonstrated and the role that each actor should have to enable and support the demonstration of the UCs.

    i.   Format: Physical or hybrid workshops + online questionnaires (if needed, if the duration of the workshops is too long and some information can be collected through questionnaires).

e. *LL5 -* **Define the KPIs and Impact Evaluation framework** - Define the KPIs that will be measured in each Living Lab based on the UCs that will be demonstrated and the climate neutrality objectives of each Living Lab. The units of the KPIs and the methods that these KPIs will be measured, will also be discussed.

    i.   Format: Workshop + online questionnaire (if needed, if the duration of the workshops is too long and some information can be collected through questionnaires).

Social embracement & behavioural change surveys:

a. *SS1:* **Travel behaviour & UC's preference exploration** – Explore the travel behaviour of citizens before the implementation of the UCs and metaServices, and their preferences, ideas and embracement for the metaDesigned UCs and metaServices.

    i.   Format: Smartphone-based questionnaires and trip/activity diaries.

b. *SS2:* **Travel behaviour change and preferences monitoring** – Explore the travel behaviour of citizens while the UCs and metaServices are demonstrated and compare it to "SS1", and explore citizens'/users of services´ preferences, ideas and embracement for the demonstrated UCs and metaServices.

    i.   Format: smartphone-based questionnaires and trip/activity diaries.

In addition to these activities, the T-LLs participate in cross-fertilisation & transferability ("CLL1" to "CLL5") activities as well as MetaSkills Hub (training) activities ("MH1" to "MH3"), as outlined in the Grant Agreement. Below, a Gantt chart detailing all the relevant activities for the T-LLs and their suggested durations during the lifetime of the project is presented.

Figure 3: T-LL MetaDesign and fertilisation activities Gantt chart

2.5. Meetings and reporting

2.5.1. Meetings involving all T-LLs and reporting

The WP3 meetings will be the main convening point gathering representatives from all the T-LLs as well as other partners that play a critical role in the T-LL preparation and implementation. WP3 convenes once every month to monitor the overall progress of the work package and to address any issues raised by participants. All WP3 task leaders (T-LL leaders and the partner responsible for the overarching monitoring and evaluation) and supporters attend these meetings to facilitate the monitoring of the T-LL activities. Additionally, the WP2 leader, the Social & Living Lab Innovation manager and the partner responsible for communication and dissemination attend these meetings to facilitate links with WP2, WP1 and WP5 respectively. Other project partners are invited to and can request to participate in WP3 meetings when required to coordinate activities within the T-LLs.

During these meetings, a comprehensive review of ongoing tasks is conducted, with updates on their progress provided by a representative from each of the T-LL updates. The discussions are guided by the responses submitted by Task Leaders through the *Living Labs monthly updates* forms, which cover main updates from the previous month, next steps for the upcoming month, and any newly encountered risks.

Additionally, there is a focused review of current risks, along with strategies for mitigation, and a status update on action items from previous meetings to ensure continuity and accountability. Meeting minutes outlining the key issues discussed are circulated shortly after each Project Board meeting. The meeting minutes are uploaded in the shared Sharepoint folders and are accessible to all project partners.

In addition to the monthly WP3 meetings, the WP leader, the Project Coordinator or other partners may call for additional coordination meetings, such as 1-2-1 meetings with T-LL leaders and supporters.

2.5.2. Coordination Guidelines for Trailblazer Living Labs

To ensure effective collaboration and coordination within each T-LL, the following key practices and guidelines should be implemented:

- **Conduct regular T-LL meetings** (monthly or more frequently) involving all the involved in the T-LL metaCCAZE partners to facilitate discussions, updates, and decision-making processes. The T-LLs should convene regular meetings involving all partners during the setting up and the operation of the T-LLs.
- **Develop a clear T-LL Gantt Chart** outlining the timeline, objectives, activities and **define the responsible partners** for each specific LL task. T-LL partners should also assign dedicated project management resources to oversee the execution of activities, track progress and ensure adherence to timelines.
- **Establish communication protocols and channels including a shared folder** to centralise documents and resources, promoting easy access and collaboration among the different LL partners. This centralised repository, which could also be the metaCCAZE platform directly, should facilitate seamless sharing of information and resources.
- **Foster consistent engagement between T-LLleaders and supporters** to ensure alignment of goals, address challenges and risks, and provide guidance and support to other WPs and Living Lab partners. Frequent communication between the T-LL leaders and the supporters is essential to gather the data and insights required from the co-design sessions and the social embracement and behavioural change surveys.

- Consider the ***implementation of a feedback mechanism*** (tools, or spreadsheets) to get inputs and insights from the stakeholders.
- ***Maintain flexibility and adaptability*** in response to changing circumstances or unforeseen challenges. Regularly review plans as needed to ensure the success of T-LL activities.

These guidelines emphasise the importance of regular communication, clear project management, stakeholder engagement, and flexibility in response to changing circumstances.

2.6. Risk Management

Risk management within the project will be handled through a close collaboration with WP6. A dedicated risk management team, composed of members from the Quality and Risk Manager (Factual) and the Project Coordinator (Ertico), has been established to oversee the risk management processes.

The risk management process includes:

- ***Risk Identification:*** All partners contribute to risk identification, with the primary responsibility resting on the Work Package Leaders (WPLs). A risk identification survey is distributed to all WPLs every three months. WPLs collect input from task leaders and other partners involved in their work packages to identify any new risks. Additionally, any T-LL task leader can report on identified risks by contacting the Quality and Risk Manager (Factual) and the Project Coordinator (Ertico) by email. Further details about this process can be found in Deliverable 6.1.
- ***Risk Evaluation:*** Once risks are identified, they are evaluated based on their likelihood and potential impact. This evaluation informs the subsequent steps in the risk management process.
- ***Risk Control:*** Prevention and mitigation actions are defined based on the risk evaluation. These actions aim to minimise the likelihood and impact of identified risks.
- ***Risk Monitoring:*** The Quality and Risk Manager from Factual updates the risk register frequently, based on the information collected through the risk identification process. The risk register, which is stored in the project folder (Risk and QA management), is the primary tool for ongoing risk monitoring.

By maintaining a structured and proactive approach to risk management, the project aims to effectively identify, evaluate, control, and monitor risks, ensuring the successful execution of project objectives.

3. Communication, Marketing & Engagement Activities

3.1. Principles for engagement and co-design (metaDesign) activities

This section of the report provides a set of principles to support the T-LLs to engage citizens and cross-sectoral stakeholders and to organise co-design activities. It offers advice on how to identify who needs to be involved in the T-LLs as well as how to approach these groups and individuals. Furthermore, it presents some guidelines for the organisation and facilitation of the co-design activities, as well as the alignment with the project communication and dissemination strategy, including its corporate identity. By co-design activities, we refer to the metaCCAZE metaDesign activities that are designed in WP1 and implemented in WP3 (T-LLs) and WP4 (F-LLs) ("LL1" to "LL5"). With these activities, the T-LLs are organising collaborative, sequential events and workshops bringing together a diverse set of actors to design and develop further the UCs, the BIGMS, the metaServices as well as the KPIs and the Impact Evaluation Framework. Besides the mini-dialogues

("LL1"), having involved those actors taking part on the SUMP design, the main method of engagement for these metaDesign activities are workshops involving internal T-LL partners, external stakeholders and citizens. The workshops can be delivered as physical workshops or in-hybrid mode.

Stakeholder mapping: The aim of the stakeholder mapping is to identify all the relevant groups and individuals that should be involved in the setting up and implementation of the Living Lab. The term "stakeholders" typically refers to individuals and organisations who are either involved in a project, or whose interests may be affected by it (either during the project implementation phase or following the completion of the project) (Smith, 2000). In the case of the T-LLs, stakeholders can be found in various sectors and fields, including the private sector (businesses), the public sector (local, regional and national authorities), communities and groups of residents (Non-Governmental Organisations, civil society associations, activists and peer pressure groups focused on mobility and sustainability issues), as well as research associations (universities and other research centres).

Early identification of relevant stakeholders is of critical importance in the metaCCAZE project to secure the development and delivery of widely accepted metaservices. An initial scoping of relevant stakeholders for each T-LL took place during the metaCCAZE Kick-off meeting. During a workshop session, each of the T-LL discussed and identified key organisations, associations and groups that should be involved within the metaDesign activities at the beginning of the project. Furthermore, each of the T-LL carried out a more detailed stakeholder mapping in the context of the Status Quo Map (T1.1). The T-LLs should be consulting and updating, as and when necessary, their stakeholder map throughout the project to ensure that they involve the right groups and individuals in their co-design activities. The stakeholder mapping activity is best performed in a group setting involving all T-LL partners. Collaborative digital tools, or printed forms can be used to facilitate collaboration among partners.

Additionally, T-LLs could perform an assessment of stakeholders in terms of potential influence and importance (low, medium, high) for their Living Lab to validate assumptions about these stakeholders´ needs and identify potential risks (e.g. lack of interest in the T-LL). The assessment can also be used to prioritise stakeholders and adjust communication strategies. A diagram like the one in figure 4 below can be used to visualise the relative influence and importance of the stakeholders. Importance refers to the degree to which the needs, aspirations and expectations of a stakeholder need to be fulfilled for the project to be considered successful (Smith, 2000). The measure reflects the importance of the stakeholders´ needs to the projects´ objectives (ibid). For example, given the user-centred approach in metaCCAZE, the mobility needs of a group of citizens are critical for the design and uptake of metaServices targeting passenger transport, making these groups important stakeholders for the project. On the other hand, influence suggests that a stakeholder has a significant level of relative power to influence the Living Lab implementation and success. Typically, high influence stems from factors, such as the stakeholder´s social, political, hierarchical position, the relationships they hold, their expert knowledge (ibid). In the case of the T-LLs, a stakeholder with high influence would be any stakeholder that can control key decisions and, therefore, outcomes of the Living Lab.
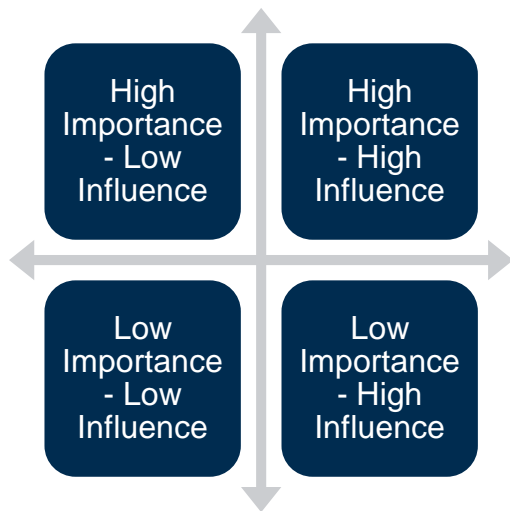
Figure 4: Importance – Influence Assessment of stakeholders

To date, the stakeholders that have been identified through the metaCCAZE KOM and the Status Quo Map fall under these categories:

- Public authorities (for example, municipalities, councils, metropolitan, regional authorities, depending on the use case and the governance and policy context in each T-LL)
- Private entities and mobility stakeholders (for example, logistics associations, local businesses, tourism sector, private schools, transport operators)
- Society Groups (for example, public schools, environmental organisations, transport advocacy groups).
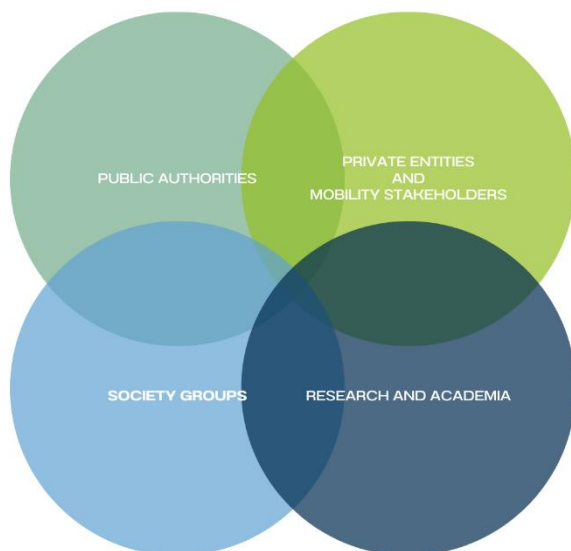- Research and Academia (for example, local universities and research centres)

Figure 5: Identified MetaCCAZE stakeholders.

Involving stakeholders in co-creation (metaDesign) activities: The T-LLs (T-LL leaders with support from all T-LL partners) are responsible for organising and delivering the co-creation sessions. The T-LL partners should disseminate information about the metaDesign events and circulate invitations targeting key stakeholders early in advance of the respective events. In order

to ensure that they are reaching out all target groups, the T-LLs will need to consider different types of channels they can use to disseminate information about their metaDesign activities (events), including the following channels:

- Local webpage or blog
- Targeted emails or calls, local newsletters
- Local newspapers or media.
- Social media, e.g. LinkedIn, Twitter
- Print media, e.g. flyers, brochures, postcards

The T-LL partners will send individual forms and will also be invited to create an event registration page (e.g. through Eventbrite or similar tools) to advertise the event and reach a wide audience. It is important to ensure that all stakeholder groups that have been identified for each Living Lab are included in the metaDesign activities. It is equally important that the events and related communication materials respect the project corporate identity and acknowledge the EU funding reference[1]. Beyond disseminating information about the events in a timely manner, the T-LLs should consider and aim to address other barriers that can potentially prevent certain groups from participating in the activities (e.g. time constraints, accessibility of the space in case of physical workshops, other accessibility barriers that could inhibit participation).

Involving citizens in metaDesign activities: The participation of citizens in the metaDesign activities (LL2 to LL4), in UCs that refer to passenger transport, is crucial for the development of widely-accepted metaServices that meet the mobility needs of diverse population groups. The T-LLs are encouraged to consider how they can reach diverse groups of citizens in terms of travel habits, needs, attitudes towards different transport modes and demographic characteristics. Care should be taken in order to adjust the key messages of the metaCCAZE project[2] and the language of any communications and invitations to reach and motivate different groups of citizens to participate in the T-LL activities. Digital and non-digital means could be used to advertise the events. The T-LLs can also seek support from some prominent organisations or "gatekeepers" who may be able to spread information about the events. These can include well-established community organisations, NGOs or public schools. In activities where stakeholders and citizens are involved, it has been proposed that the first group may act as citizens as well.

Although financial incentives are not the only way to motivate people, they are one way to encourage participation in the co-design activities. The T-LL partners are encouraged to include networking sessions in which both citizens and stakeholders may have the chance to find cooperation synergies. Besides, it is encouraged to build a communication channel with the citizens to inform them about the evolution of the UCs and indicate how their opinion have been taken into consideration.

Delivering engaging and effective metaDesign sessions: The T-LL leaders hold the responsibility for organising and delivering the metaDesign sessions, while T-LL supporters are responsible for collecting data during these sessions and analysing their outputs to design and validate the UCs, the metaServices and the BIGMS. The partners leading these activities are outlined in the Grant Agreement (Table 3: The metaCCAZE metaDesign and fertilization activities).

It is important to note that detailed guidelines for all the metaDesign activities (under the Task 1.6 framework) have been provided to T-LL partners in a form of ad-hoc documentation, which will be included as an annex within D1.2. As part of this, the partners that are responsible for the design

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[1] Deliverable 5.1: Dissemination, communication and liaison strategy & toolkit
[2] Deliverable 5.1: Dissemination, communication and liaison strategy & toolkit

of the activities will be providing a framework for the metaDesign activities (the workshops), an agenda for the day and recommendations on the materials, technologies and communication tools that will be used. Additional material will also be provided, including a "pitch" presentation deck for metaCCAZE, and discussion topics and questions to guide the activities of the workshop. The T-LL supporters will be responsible for ensuring that the materials for the metaDesign sessions are translated correctly into the native languages of the T-LLs. They will also adjust the questions accordingly, taking into consideration the particular UCs.

Before the start of each workshop, the Living Lab partners are encouraged to set some ground rules to ensure a good level of engagement, open conversations, and honest feedback by all participants. If possible, all groups in a workshop should be facilitated by one individual, part of the main T-LL team.

Data management of metaDesign sessions and social embracement and behaviour change surveys: The Living Lab supporters are responsible for monitoring the Ethics and the Data Protection Protocols during the metaDesign activities and the metaDesign activities: social embracement and behaviour change surveys. The Data Protection Protocols are developed by the MLab and outlined in the D6.2. - Data management plan & Ethics - initial.

3.2. Communication and marketing activities

Communication and marketing activities are essential for different processes and outcomes of the T-LL, such as:

- Engaging stakeholders and citizens to facilitate the co-design of user-centred solutions, raise awareness and build trust;
- Advertising the successes of the T-LLs and demonstrating the impact of the tested zero-emission shared mobility solutions;
- Promoting the metaServices to encourage high levels of uptake within the T-LL cities, foster community ownership and sustainable behavioural change.

Communication and dissemination activities - at the project level - are managed by STEINBEIS, who define key messages for respective target groups, channels, and tools for outreach, engagement, and synergies with other activities through the dissemination, communication and liaison strategy & toolkit (D&C Strategy). This strategy establishes cross-cutting actions and links with all work packages, detailing communication and dissemination activities throughout the project.

Key outputs of the D&C Strategy include the project website, social media, digital publications, press and media material and regular newsletters to update stakeholders and the public on project progress, milestones, and upcoming events.

A dissemination and communication team (D&C Team), comprising representatives from all partners, has been established to ensure alignment of activities and share best practices. This collaborative approach will enhance the overall impact and reach of the communication efforts.

STEINBEIS will support T-LLs in developing their local communication and marketing strategies and associated campaigns.   The local strategies will aim to encourage behavioural change and should be tailored to the local context of each Living Lab and their UCs. This targeted approach will ensure that the communication efforts are relevant and effective within the specific contexts of the T-LLs. Locally, the T-LL leaders with support from the other partners, will be responsible for creating and leveraging their own marketing channels and materials to achieve the aims of the project. T-LLs are encouraged to create a local D&C Team responsible for managing local communication campaigns and events.

At the beginning, local communication and marketing strategies will build on the mapping of the media and other communication channels realised in Sub-Task 1.1.1. Beyond a guide for designing their local communication and marketing strategies (annex 2), STEINBEIS can provide, if needed, templates for communication materials to be adapted and translated into local languages by local D&C teams.

4. Conclusions

This document provides guidelines for the management, the communication and engagement processes that need to be established within the T-LLs. It details the roles and responsibilities of the key Living Lab partners and it describes the tools and processes to ensure that the T-LLs are built upon strong foundations and in accordance with the Grant Agreement. It highlights the distinctive roles of the T-LL leaders, the supporters and other partners to ensure smooth cooperation and clarity around each party´s responsibilities.

The deliverable is particularly relevant for the execution of all the tasks that will need to be delivered within WP3, including the ones initially designed in other WPs (e.g. WP1). Integral elements of this deliverable are the guidelines for communication, marketing and engagement activities. Given the critical importance of the co-design (metaDesign) processes for the uptake and public acceptance of the metaServices and UCs, in this document, we have attempted to highlight the procedures that need to followed to ensure the participation of citizens and stakeholders from the early stages of this project. Moreover, practical steps to formulate local communication & marketing strategies have been identified. The T-LL partners are encouraged to be consulting this Handbook during the whole process of the Living Labs´ implementation and evaluation.

The next deliverable that falls under the remit of WP3 (D3.2 - Trailblazer LLs: co-design activities, implementation preparations, monitoring plan) will evaluate the metaDesign activities and identify lessons learnt during this initial phase of the project. It will also provide a detailed plan for the implementation of the demos in the T-LLs and assess the need for potential adjustments.

5. Literature /References

Smith, L. W. (2000). Stakeholder analysis: a pivotal practice of successful projects. Paper presented at Project Management Institute Annual Seminars & Symposium, Houston, TX. Newtown Square, PA: Project Management Institute

metaCCAZE (2024). D6.1. Project handbook, inception, quality and risk management

metaCCAZE (2024). D6.2. Data management plan & Ethics – initial

metaCCAZE (2024). D5.1. Dissemination, communication and liaison strategy & toolkit

6. Annex 1 - T-LLs monthly updates forms

This survey serves as a platform for reporting monthly WP3 - Living Lab updates and keeping the MetaCCAZE consortium informed.

Kindly use this form to report any significant updates from the past month. Should you have any questions or require assistance, please don't hesitate to reach out to Lamprini Papafoti (lamprini@factual-consulting.com) or Catarina Sales (catarina@factual-consulting.com) directly.

Your cooperation is much appreciated!

1. Living Lab / WP3 task
   a. Task 3.2 Amsterdam
   b. Task 3.3 Munich
   c. Task 3.4 Limassol
   d. Task 3.5 Tampere
   e. Task 3.6 Monitoring, evaluation and lessons learnt.

2. Task Leader. Please provide the name of the individual to contact regarding the answers to this form. Ideally, this should be the task leader.

3. What are the main updates from the last month in your Living Lab/Task? For example: Dissemination activities; Key meetings; Workshops; Recent developments in relation to the use cases; etc. Please detail which information is still confidential and which can be used for dissemination purposes.

4. What are the next steps for the upcoming month?

5. Did you encounter any new risks? If yes, please describe them.

6. Please upload any images or visual materials related to your activities from the past month into the 'Images_visual material for dissemination activities' folder, located in the MetaCCAZE SharePoint under the WP3 folder. Please note that these pictures might be used for dissemination purposes on metaCCAZE website and social media channels.

7. Annex 2 - proposed structure for the metaCCAZE local communication and marketing strategies

Background

The metaCCAZE dissemination, communication and liaison strategy & toolkit (D5.1) is currently being finalised and will be submitted to the EC at the end of June (M6).

At the living lab level, a local communication and marketing strategy is needed as well, to effectively engage with citizens and local stakeholders by delivering targeted, relevant messages that resonate with local contexts. It contributes to the co-design of user-centered solutions, enhances trust and credibility, and allows for quick adaptation to local trends and issues.

Local Communication Strategy

To achieve some harmonisation between the local communication strategies, and to assure most relevant aspects are covered, the local T-LL communication partners are advised to use the below structure as a guide.

The proposed structure below should help the LLs with preparing their strategies:

- Introduction: setting the scene of the respective T-LL
- Purpose of the communication strategy
- Relation to the metaCCAZE D&C Strategy, i.e., the T-LL should check what aspects from the D&C strategy is taken over or will be implemented in the local strategy.
- Goals of the communication strategy – the T-LL should specify the local priorities
- Stakeholder mapping and target audience (based on metaCCAZE D&C strategy and the stakeholders identified in T1.1).
- Set up of D&C channels and materials, e.g.:
    o local website or webpage
    o local newsletter
    o local flyer, brochure, postcard
    o local social media channels
    o videos
    o media work
    o press releases
    o participation to third party events
- Planning D&C activities (timeline)
- Use of metaCCAZE corporate identity and key messages
- Implementation of the local D&C team

Check list

Please remember:

☐Monitoring D&C activities – please remember to fill in the metaCCAZE D&C Activities List

☐ All communication materials, whether print or digital – please adhere to the metaCCAZE styleguide and display the EU emblem as set out in the EU visibility guidelines.

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