	SEQUOIA PROJECT *"Socio-Economic Impact Assessment for Research Projects"* Contract n° 258346

WP5: Dissemination of Selected Projects' Outputs

Deliverable D5.1 – Report on Engagement Practices

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Executive summary

This deliverable presents the main engagement activities performed in the last year of the SEQUOIA project (from May 2011 to April 2012) and it can be considered a completion of the previous deliverable D4.3b - "Report on Collaboration Activities Performed".

With the term "engagement practices" we include all the activities aimed at increasing interest in SEQUOIA's results on the part of the stakeholders in the field of socio-economic impact. For this reason in the following deliverable we report activities that involved Call 1 and Call 5 projects for the definition of the SEQUOIA methodology, but also dissemination activities performed to promote SEQUOIA achievements in different contexts.

The deliverable is divided into three sections: The first section reports the public events in which the SEQUOIA project disseminated its results at two important events: the 2011 Collaboration Meeting, organised by the European Commission in September 2011 to foster the collaboration of FP7 projects in the "Internet of Services Area", and the Future Internet Socio Economics (FISE) workshop held in conjunction of the Future Internet Assembly (FIA) event in Poznan in October 2011, which focused on the effects of disruptive technologies on the FI business ecosystems.

The second section summarises the main activities that involved Call 1 and Call 5 projects in the definition of the methodology and the impact assessment process. This section shows in detail the degree of involvement of the individual projects: in particular, it reports detailed information about the participation in the Second Questionnaire and the online interviews organised to collect additional information from the projects.

The last section shows the dissemination material produced by the SEQUOIA team to promote and share the projects' final results: the brochure "How-to guide Highlights" and the "best practices" promotional video, both presented during the SEQUOIA final conference, are presented in this section.

At the end of the deliverable we also present a list of all the engagement activities performed by the SEQUOIA project taking into consideration its entire duration.

SEQUOIA engagement approach

The last year of the SEQUOIA project was focused on the fine-tuning of the self-assessment methodology and the assessment of Call 1 and Call 5 projects. For this reason, engagement activities were extremely important in this period.

Among the engagement practices, one-to-one contact with the single projects was considered the most important, since it helped create a good relationship and build trust towards the SEQUOIA team. Particular attention was given to the organisation of the online sessions and interviews with collaborating projects in order satisfy their needs in terms of the time and effort they could dedicate to this activity. This approach created a friendly and productive environment in all the activities performed.

Another aspect that was taken into account was the use of the right language and means to disseminate the SEQUOIA results. SEQUOIA's communication activities were often targeting people who were not accustomed to socio-economic and social science concepts, language and way of thinking. For this reason, the project has developed more easy-to-read materials as well as the technical deliverables. In particular, the SEQUOIA methodology was disseminated through the official deliverables, as well as through a more easy-to-read brochure: the "How-to guide highlights" that in a few pages gives an overview of the methodology and the way to use it with concrete examples.

It is also important to underline that during the last year of the SEQUOIA project we continued and improved collaborations already started in the first months of 2011: in particular, we refer to the collaboration with the HOLA! project and with the SESERV project. We uploaded all our public deliverables to the HOLA! portal and we cooperated with SESERV for the organisation of the FISE workshop.

We also continued to use online tools, in particular the SEQUOIA LinkedIn group and the project official website, which was also used for the dissemination and organisation of the SEQUOIA Final Conference and Workshop.

Events participation and organisation

Consultation Workshop

On 28 and 29 September 2011 the European Commission organised the "Internet of Services Technical Collaboration meeting" to which all representatives of FP7 projects in the area of Software & Services, Grid and Software and Service Architectures and Infrastructures were invited. The meeting aimed to achieve a better understanding of the results of the FP7 projects in the "Internet of Service Area" but also to consolidate the collaboration activities among the projects giving the possibility to each project to present its results through poster and dissemination materials.

The meeting was structured in a plenary session, followed by several parallel sections dedicated to different working groups. This represented a good opportunity for SEQUOIA for performing its Consultation Workshop (see D4.2.2). The objectives of the Consultation Workshop were to disseminate the activities of the SEQUOIA project, to present the methodology and preliminary results, and to facilitate the networking among Call 1 and Call 5 projects and their possible beneficiaries, users, and other actors interested in supporting the exploitation of their results. The SEQUOIA consortium considered it would be too difficult to organise an ad-hoc event that would reach the desired audience. Consequently, we maximised our presence during the Collaboration meeting. A short summary of the activities performed is reported below, with a more in-depth description in D4.2.2.

During the plenary session of this event, Paolo Dini, the SEQUOIA project coordinator, and Antonella Passani (T6 Ecosystems) presented an overview of the SEQUOIA context and methodology, showing also a preview of the assessment results. SEQUOIA was also involved in the "Techno Socio-Economics" working group session that aimed to provide an overview on the on-going initiatives that are facing the socio-economic implications of technologies implemented for the Internet of Services. During this session Francesco Bellini (Eurokleis), presented a more complete description of the methodology assessment process and the results collected: in particular during the presentation he described the different phases and the main indicators upon which the SEQUOIA methodology is based, and several charts summarising SEQUOIA questionnaire results.

The SEQUOIA team also actively participated in the session dedicated to dissemination organised by the HOLA! Project. Isabel Matranga (Engineering) and Anne English (LSE) gave a presentation, "Assessment Meets Dissemination", explaining how the SEQUOIA assessment methodology can support dissemination of projects' results. In fact, the adoption of the SEQUOIA methodology can help the projects to better identify their social and economic innovation potential, their target audience and potential users. In essence, through the application of the SEQUOIA methodology project representatives can better understand their own project outputs and therefore perform more effective dissemination activities.

All the presentations described above are available on the SEQUOIA website and in D4.2.2.

FISE Workshop

Another important event for dissemination of SEQUOIA results was the FISE Workshop "How Disruptive Technologies Influence the FI Business Ecosystem". The workshop, co-organised by the SESERV, SEQUOIA and UNVERSELF projects, was a full-day event on 27 October 2011 in Poznan (Poland), at the same location of the Future Internet Week and the FIA event.

The main topic of the workshop related to the effects of disruptive technologies on the FI business ecosystems: for this reason the presentations and discussions were focused on the assessment of the FI business ecosystem and the dynamics of stakeholders in relation to technological results that are performed in several FI projects.

During the workshop some techniques for analysing FI ecosystems and methodologies to understand both baseline and future scenarios were analysed.

The SEQUOIA team was involved in the organisation of the workshop and in the arrangement of specific sessions. In particular Paolo Dini showed a presentation about the engagement of geographical and virtual communities at the periphery of the future internet in the online economy.

During this session we also organised the SEQUOIA Methodology Transfer Workshop. The aim of the workshop was to transfer the SEQUOIA assessment method to the different projects clarifying the most important aspects of the methodology and any open issues. During the workshop Antonella Passani presented[1] the main components and the methodology of SEQUOIA and the related How-to Guide[2] that supports the assessment process.

The FISE workshop represented a very important opportunity to transfer the SEQUOIA methodology to the participating audience, and also to discuss the possible open issues related to socio-economic impact assessment: for example the time-frame issues related to the difficulties of assessing impact at the end of a project, while the real and interesting impact may take years to occur.

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[1] http://prezi.com/jm1zsr2vphv7/sequoia-self-assesment-how-to-guide/
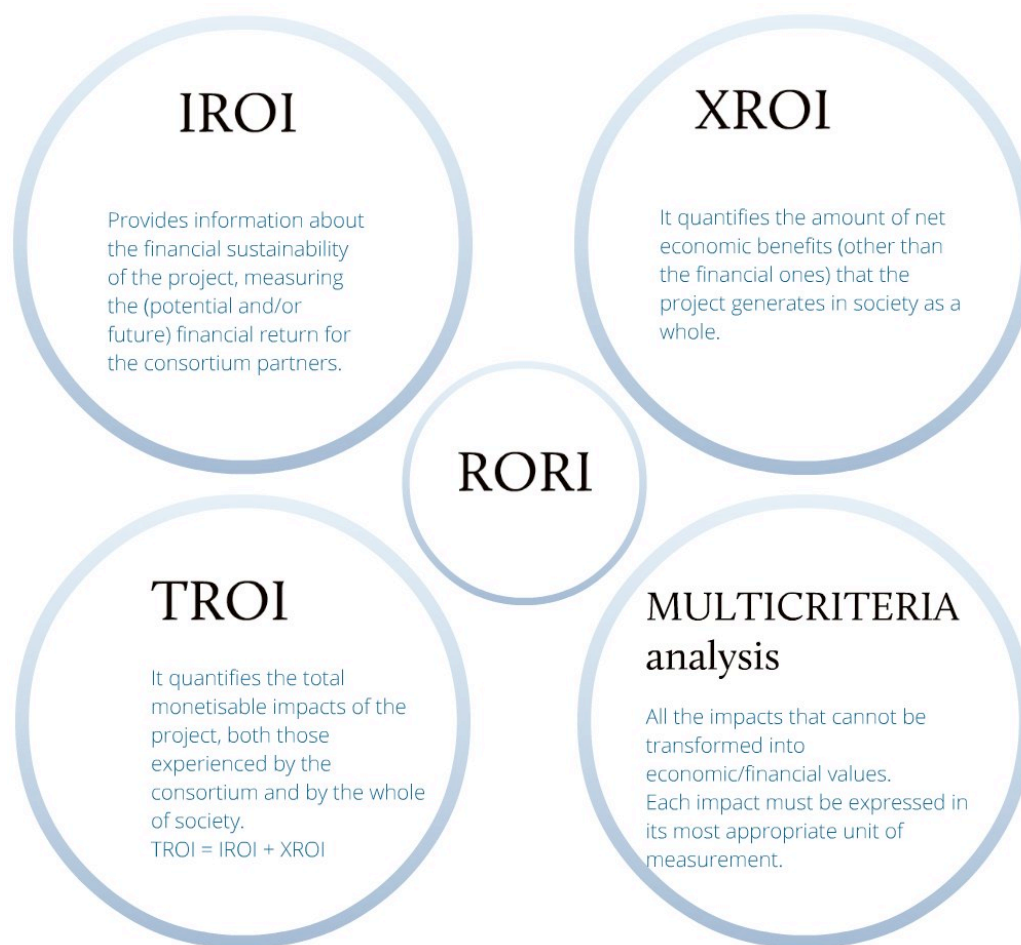[2] Deliverable D3.3b – "SEQUOIA Self-Assessment How-To Guide"

Figure 1 – Methodology indicators from "Self-assessment how-to guide" presentation (A Passani)

Engagement activities

Call 1 and Call 5 projects were invited to participate in the impact assessment activities. After the first focus groups (organised online) and the circulation of the first questionnaire[3], the projects were invited to participate in successive activities aiming at assessing their socio-economic impacts and at fine-tuning the SEQUOIA methodology. In particular, they were invited to fill the Second Questionnaire, then to participate in bilateral interviews, and finally to review their impact assessment carried out by the SEQUOIA team.

The Second Questionnaire was sent to all Call 1 and Call 5 projects and was available online from the end of April to August 2011. A reminder was sent first by the SEQUOIA team and then also by the Project Officer in autumn 2011 to the Call 5 projects who had not yet filled out the Questionnaire.

In the end, five Call 1 Projects and nineteen Call 5 projects completed the questionnaire, and 6 filled it partially (Figure 2).
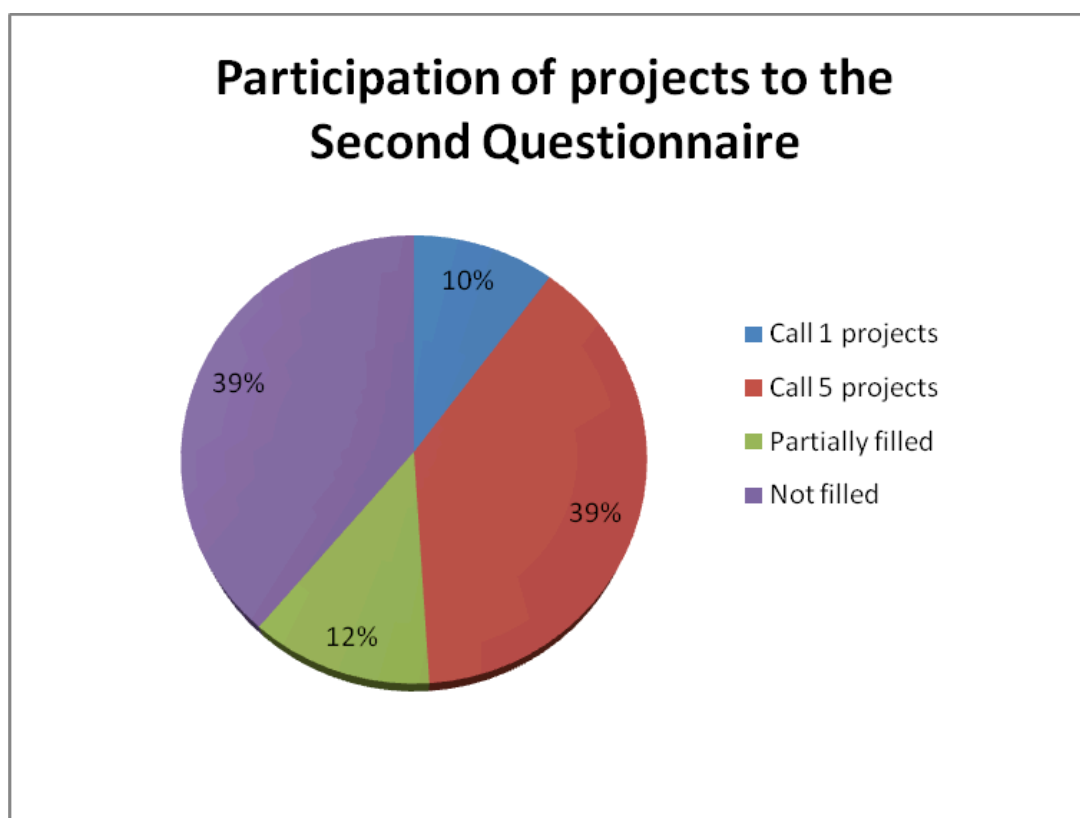

Figure 2 - Participation of projects to the Second Questionnaire

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[3] Deliverable D4.2.1- " Report on Focus Group"

The SEQUOIA experts analysed the data gathered through the questionnaires, and decided to organise bilateral interviews with the projects' representatives in order to obtain additional information.

The projects were contacted at the end of the summer, and 13 interviews were organised in September and October 2011, through Skype, on the phone or face-to-face. Before the interview, the experts sent the projects information about the questions that would be discussed during the interviews in order to prepare them.

The interviews had different objectives:

- to help the projects elaborate the responses to those questions they had not answered;
- to gather additional information in order to be able to make a more in-depth impact assessment;
- to obtain the impressions and comments of the projects on the questionnaire and the overall methodology in order to fine-tune it;
- to strengthen the relationship with the projects.

The following table shows the projects who participated in the interviews together with their contact persons:

Projects	Participants
ADMIRE	Rob Baxter
SOCIETIES	Kevin Doolin
DiVA	Geir Horn
Vision Cloud	Eliot Salant
FastFix	Alessandra Bagnato
SocIoS	Konstantinos Tserpes
PERSIST	Kevin Doolin
Contrail	Roberto Cascella
Serenoa	Ignacio Marin
I2Web	John O'Flaherty
REMICS	Parastoo Mohagheghi
S-Cube	Andreas Metzger
Mosaic	Beniamino Dimartino

Table 1 - Projects who participated in bilateral interviews with the SEQUOIA experts

Finally, in December 2011 the SEQUOIA experts assessed the socio-economic impacts of the 24 projects that had filled the Second Questionnaire and sent each of them a short assessment report in order to gather their comments and observations. 11 projects replied, giving their consent on the assessment report, and 7 of these projects provided comments and suggested some integrations to the report.

The two following tables and Figure 3 synthesise the overall participation of the Call 1 and Call 5 projects in the activities regarding their impact assessment.

CALL 1:

Project	Focus Group	I Quest. Answered	II Quest answered	Interview done
ADMIRE	YES	NO	YES	YES
ALIVE	NO	NO	NO	NO
COMPAS	NO	NO	NO	NO
DEPLOY	NO	NO	NO	NO
DIVA	YES	NO	YES	YES
FAST	NO	NO	NO	NO
IRMOS	YES	YES	Partially	NO
MANCOOSI	NO	NO	NO	NO
M:CIUDAD	NO	NO	Partially	NO
MOST	NO	NO	NO	NO
NEXOF-RA	NO	NO	NO	NO
OMP	NO	NO	NO	NO
OPEN	YES	NO	NO	NO
PERSIST	YES	YES	YES	YES
PROTEST	NO	NO	NO	NO
Q-IMPRESS	YES	YES	NO	NO
RESERVOIR	YES	YES	Partially	NO
ROMULUS	NO	NO	NO	NO
S-CUBE	YES	NO	YES	YES
SERVFACE	YES	NO	Partially	NO
SHAPE	YES	NO	NO	NO
SMARTLM	NO	NO	NO	NO
SOA4ALL	NO	YES	NO	NO
STREAM	YES	NO	NO	NO
SLA@SOI	NO	NO	YES	NO

Table 2 - Participation of Call 1 projects in the SEQUOIA impact assessment activities

CALL 5:

Project	Focus Group	I Quest. Answered	II Quest answered	Interview done
4CAAST	NO	NO	NO	NO
ACSI	YES	NO	YES	NO
ALERT	NO	NO	YES	NO
CHOREOS	YES	YES	YES	NO
CLOUD4SOA	YES	NO	YES	NO
CLOUDTM	YES	NO	NO	NO
CONTRAIL	NO	NO	YES	YES
CUMULONIMBO	NO	NO	YES	NO
FASTFIX	NO	YES	YES	YES
FITTEST	YES	NO	Partially	NO
I2WEB	YES	NO	YES	YES
INDENICA	NO	NO	YES	NO
MOSAIC	NO	NO	YES	YES
OMELETTE	YES	NO	YES	NO
OPTIMIS	YES	NO	Partially	NO
PLAY	YES	NO	NO	NO
REMICS	YES	NO	YES	YES
SERENOA	YES	NO	YES	YES
SOCIETIES	YES	NO	YES	YES
SOCIOS	YES	NO	YES	YES
SRT-15	NO	NO	YES	NO
VISION CLOUD	YES	NO	YES	YES
WEBINOS	YES	NO	YES	NO
HOLA	YES	NO	YES	NO

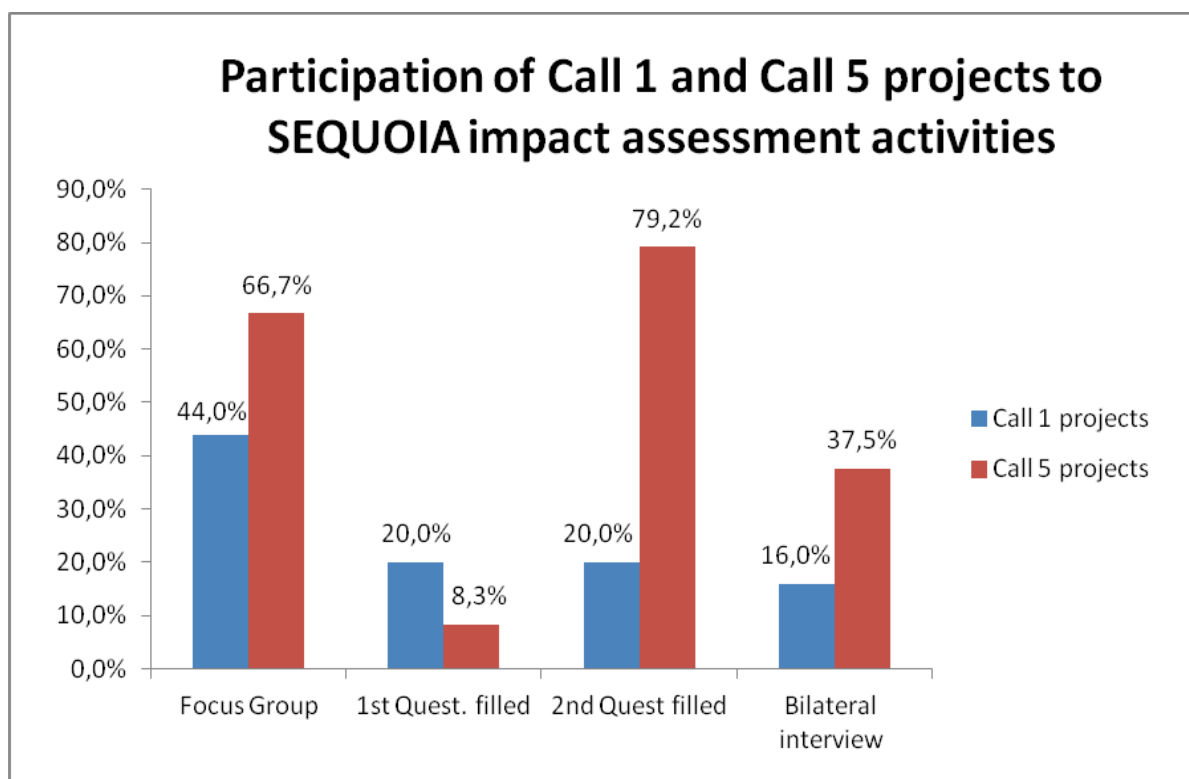Table 3 - Participation of Call 5 projects in the SEQUOIA impact assessment activities

Figure 3 - Participation of Call 1 and Call 5 projects to impact assessment activities

Figure 3 demonstrates a high participation of all the projects engaged in the SEQUOIA activities. Call 1 projects participated less in the activities, especially in 2011, but this can be explained by the fact that most of these projects were already finished. It is interesting to note that some project representatives actively participated in the SEQUOIA activities even though their projects had already ended.

The interest of the projects towards SEQUOIA activities and the good level of engagement are also visible through their overall behaviour towards the project:

- the projects showed a high availability to participate in all the activities carried out by SEQUOIA, (focus groups, questionnaire, interviews, feedbacks on reports, presentation at the final conference);
- they usually responded in a short time to the emails and requests sent by SEQUOIA experts;
- some projects sent positive comments on the deliverables available on-line, in particular on the How-to-Guide, and on the assessment reports elaborated by the SEQUOIA team.

Dissemination tools and Materials

This section describes briefly the dissemination tools and materials produced during the collaboration activities of SEQUOIA related to the period covered by this deliverable.

Best Practices Video

In order to better transfer the methodology, to promote SEQUOIA's results and the projects that scored highest in the SEQUOIA assessment process, the "best practises"[4] , the project team created a video presented at the SEQUOIA final conference that was held in Brussels on 13 March 2012.

Figure 4 - SEQUOIA Best Practises Video

The video, developed through the Prezi online tool[5], can be divided into two parts: the first part gives an overview of the context of the SEQUOIA project, its main aims, and the methodology. The second part describes briefly the 6 best-practises projects explaining why they scored higher in the SEQUOIA assessment project. In the development of the video also the 6 best-practises projects were involved in the validation of the content of the messages included to promote their outputs. The video is available on the SEQUOIA website.

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[4] See "Deliverable D3.2 – Best Practise report"
[5] http://prezi.com/

"How-to Guide Highlights" Brochure

One of the most important SEQUOIA deliverables is the D3.3b "SEQUOIA Self-Assessment How-To Guide", which aims to provide the necessary information to understand and apply the SEQUOIA methodology for socio-economic impact self-assessment to SaaS and IoS research projects. It is a step-by-step guide with practical examples and it also includes a complete questionnaire to be used in the assessment process.
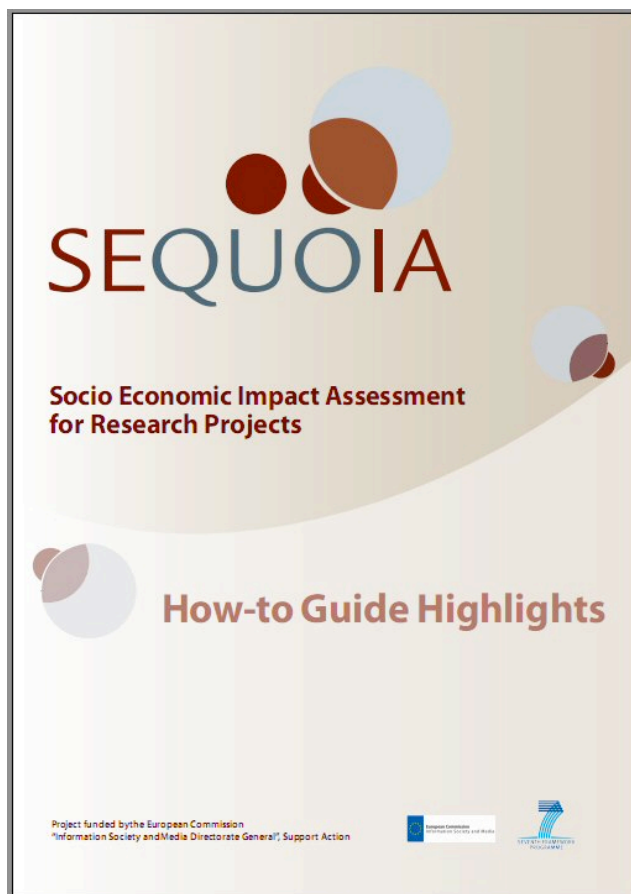

Figure 5 - How-to Guide Highlights

In order to help those who are not experts in the field of socio-economic impact but who are interested in the SEQUOIA methodology, a shorter and simpler version of the D3.3d was developed, the "How-To Guide Highlights".

This booklet gives a first general overview of the SEQUOIA methodology in a friendly and communicative way, allowing the reader to understand whether the methodology fits his/her needs: the "How-To Guide Highlights" does not substitute the D3.3b but it can be considered as an entry point to the more complete contents of the deliverable.

The How-To Guide Highlights was distributed in paper version during the SEQUOIA Final Conference[6] and it is also available on the project website.

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[6] See D6.2 "Final Conference Proceedings"

Conclusions

This deliverable reported the main activities performed in the last year of the SEQUOIA project: as shown in the previous sections most of the activities aimed to involve Call 1 and Call 5 projects in two steps: the fine-tuning of the SEQUOIA methodology, and the socio-economic impact assessment. This involvement process was one of the most important challenges of the project: for this reason the SEQUOIA team paid great attention to the development of a friendly and stimulating collaboration environment to motivate the different projects to participate to the activities showing the possible benefits of the SEQUOIA assessment process.

In the following table we give a complete list of the engagement dissemination activities performed during the whole duration of SEQUOIA project. A detailed description of the activities related to the first year of the SEQUOIA project can be found in D4.3b - "Report on Collaboration Activities Performed", while a complete report about the SEQUOIA conference is contained in D6.2 - "Final Conference Proceedings".

Event	Date	Objectives
Preliminary Questionnaire	Last quarter of 2010	• Collect preliminary information about Call 1 and Call 5 projects • Motivate the projects to begin collaborating with SEQUOIA
Focus Groups session	First quarter of 2011	• Create an environment where projects Call 1 and Call 5 could get to know each other and the SEQUOIA team talking informally, and sharing common experiences in impact assessment topic. • Feedback by the projects about the second SEQUOIA questionnaire contributing to the definition of variables and indicators of the methodology.
Reservoir Project Meeting	10 March 2011, Taormina (Italy)	• A face-to-face explanation of SEQUOIA's objectives and activities and understanding of Virtualized Infrastructure" cluster
Second Questionnaire	April to August 2011	• Collect information to assess projects' socio-economic impact • Fine tuning of SEQUOIA methodology
FIA 2011 (1st event)	17 - 19 May 2011, Budapest, Hungary	• Dissemination of SEQUOIA achievement and networking with interested projects
Online Interviews	September - October 2011	• Fine-tuning of the SEQUOIA methodology • Strengthen the relationship with the projects
Collaboration meeting 2011	28- 29 September 2011, Brussels	• Dissemination of SEQUOIA methodology, collect feedbacks from stakeholders

FIA 2011 (2nd event) - FISE workshop	24-27 October 2011, Poznan, Poland	• Dissemination of SEQUOIA Methodology and How-to Guide • Cooperation with FIA projects
SEQUOIA Final Conference and Workshop	13 March 2012, Brussels	• Final transfer of the SEQUOIA methodology • Showcase of the technological outputs of a set of projects that have used the methodology

Table 4 - Engagement and Dissemination activities