



**D3.2 Strategic Roadmaps for  
the implementation and  
support of territorial RRI  
through Participatory  
Research Agenda Setting  
within S3 priorities**



TRANSFORM



# Deliverable description

**Deliverable:**

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D3.2 Strategic Roadmaps for the implementation and support of territorial RRI through Participatory Research  
Agenda Setting within S3 priorities

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## Summary.

This deliverable is intended to describe all the activities carried out in Lombardy thanks to TRANSFORM to support the implementation of territorial RRI through Participatory Research Agenda Setting methodology to set and implement S3 priorities.

In order to contextualise what happened in Lombardy so as to use that experience in each own setting and territory, adapting it according to local peculiarities, a general overview of the regional context has been provided, also providing details about the RRI maturity of the territory and past experiences. The methodology selected by the actors in Lombardy (Regional Government, Finlombarda and Bassetti Foundation, which led the process) has been also detailed, also presenting the expected benefits of implementing such approach in general terms but also specifically in terms of Lombardy Region expectations.

Then a full description of what TRANSFORM performed in Lombardy has been included. Tiny details on the results – which are not useful for replications – are not inserted but they can be easily findable and retrievable in the TRANSFORM website (in English) and in the section dedicated to TRANSFORM in the Lombardy Region's Open Innovation online platform (in Italian), which acts as a public and transparent repository for citizens and local stakeholders willing to follow the process and know more about the outcomes and the integration in the regional policymaking.

How the results have been used by Lombardy Region in designing better and more aligned with citizens' needs, view and expectations R&I policies and strategic plans as well as other relevant impacts of this TRANSFORM experience are also explained. Finally, a set of guidelines for the practical grounding of the participatory journey has been presented in the last part of the report, to accompany potential replicators in the execution of similar processes.



# Table of contents

|  |           |
|--|-----------|
| <b>Summary.</b>  | <b>4</b>  |
| <b>Methodology and expected benefits.</b>  | <b>6</b>  |
| Methodology  | 6         |
| Expected benefits  | 8         |
| <b>Regional context.</b>   | <b>10</b> |
| <b>Actions.</b>  | <b>13</b> |
| Survey on citizens' needs to inform the 3 Years Strategic R&I Program  | 13        |
| <i>Methodological note</i>   | 14        |
| Online deliberative workshop to inform the 3 Years' Strategic R&I Program's section "Sustainability Ecosystem"                                   | 17        |
| <i>Methodological note</i>   | 17        |
| Citizens' Jury to inform regional (data-driven) Smart Mobility policies  | 21        |
| <i>Methodological note</i>   | 22        |
| <b>Impact.</b>   | <b>25</b> |
| Impact on Lombardy Region R&I policies   | 25        |
| <i>Impact of TRANSFORM on the Three Years' Strategic Program for Research, Innovation, and Technology Transfer (PST) and connected documents</i> | 25        |
| <i>Impact of TRANSFORM on the Regional Smart Specialization Strategy 2021-2027 (S3)</i>  | 28        |
| <i>Impact of TRANSFORM on S3 implementation</i>  | 29        |
| Impact on regional R&I ecosystem   | 30        |
| Impact on citizens   | 31        |
| <b>Practical guidelines.</b>   | <b>33</b> |



# Methodology and expected benefits.

## Methodology

One of the primary objectives of the TRANSFORM project in Lombardy was to develop and test participatory methodologies to be used in the definition of the regional research and innovation agenda setting. The primary purpose of participatory research agenda setting methodologies, as the name suggests, is in fact to identify, together with the community involved (*participatory*), the priorities that should guide the policy planning (*agenda setting*) in the field of research and innovation (*research*).

Participatory research agenda setting may include different methods to engage citizens, including both face-to-face and online formats.

In general, a preliminary analysis of stakeholders to be involved is needed in order to identify the unheard voices of the decision-making process so as to re-introduce them. Including them is important as it brings different perspectives and a broader spectrum of views that would be normally overlooked. In the case of TRANSFORM in Lombardy, in which a solid Entrepreneurial Discovery Process<sup>1</sup> was already in place for the formulation of R&I regional strategic plan, local citizens have been identified as the main target of the participatory exercise.

Then, at the centre of the engagement process, there is the gathering of a representative group of citizens/stakeholders which is asked to share visions for the future in terms of needs, wishes, concerns and challenges, using different

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<sup>1</sup> "The Entrepreneurial Discovery Process (EDP) is an interactive and inclusive process in which the relevant actors identify new and potential activities and inform the government. The government assess this information and empowers those actors most capable of realising the potential. This process is what mainly distinguishes Smart Specialisation from traditional industrial and innovation policies. Stakeholder collaboration (entrepreneurial discovery process) is one of the key elements for smart specialisation strategies and a core element of the European Regional Development Fund (ERDF) Enabling Condition "Good governance of national or regional smart specialisation strategy" for the period 2021-2027" (from JRC – S3 Platforms website: <https://s3platform.jrc.ec.europa.eu/edp>).



methods, such as focus groups or dialogue and deliberative workshops. The dialogue might be enriched by public online consultations that can happen before the dialogue process to narrow-down the topic(s) to be discussed in depth during the workshops.

Collected views are integrated with policy-makers and/or other relevant stakeholders to develop an actionable agenda.

TRANSFORM in Lombardy has structured its process mainly using deliberative methods. In particular it has implemented:

- A structured consultation (through a survey administered online and by phone), involving a sample of 1000 inhabitants in Lombardy and a deliberative workshop to focus on a key topic emerged from the consultation, in the first phase of the project;
- A Citizens' Jury involving a mini-public of 24 citizens.

In deliberative processes, a group of citizens meet, learn, discuss and elaborate collective recommendations on a specific issue of community interest to be delivered to the decision-makers who commissioned the deliberative process.

Main features of deliberative processes are:

- Number of participants: Relatively small (but representative) groups of people, as it is difficult to have deep deliberation among large numbers;
- Participants selection method: Typically, a civic lottery, which combines random selection with stratification, to assemble a public body that is representative of the public, able to consider perspectives, and not vulnerable to being stacked by representatives of powerful interest groups<sup>2</sup>;
- Structure of the process: informative phase (with external and neutral speakers), dialogue phase and deliberative phase.

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<sup>2</sup> The first two features have been taken from the OECD report ["Innovative Citizen Participation and New Democratic Institutions: Catching the Deliberative Wave"](#)



Ensuring impartiality of the process is of utmost importance to guarantee that each participant has a 'say' in the matter. This includes equal representation, use of non-technical language, convenient time and location of the meetings and giving participants enough time and information before the meeting to prepare for it.

For the citizens - selected in such a way that the group reflects the characteristics of the target population (mini-public), e.g., in terms of age, gender, area of residence - this is a great responsibility, but also a great opportunity to make their voices heard and at the same time to represent the community they belong to and its different needs. Therefore, everyone should have the same chance to participate, and the selection should ideally take place randomly.

### ***Expected benefits***

The deliberative processes, if a Citizen's Jury, a Citizens' Assembly or a Citizens' Panel, bring several advantages, that definitely have been the main reason why Lombardy Region decided to embark on TRANSFORM and to select participatory research agenda setting as the approach to be implemented in the region.

According to the OECD report, benefits of deliberation are:

- Better policy outcomes because deliberation results in considered public judgements rather than public opinions;
- Greater legitimacy to make hard choices;
- Enhance public trust in government and democratic institutions by giving citizens an effective role in public decision making;
- Signal civic respect and empower citizens;
- Make governance more inclusive by opening the door to a much more diverse group of people;





- Strengthen integrity and prevent corruption by ensuring that groups and individuals with money and power cannot have undue influence on a public decision;
- Help counteract polarisation and disinformation.

Furthermore, in the case of Lombardy Region, already experienced in online consultations through the online portal “Open Innovation”, this approach constitutes a more solid and deeper way to engage citizens in regional R&I policymaking.

The high-value of such methods and the full awareness that these exercises are not so diffused in Italy were at the basis of the decision for the Lombardy Cluster to translate in Italian the OECD report “Innovative Citizen Participation and New Democratic Institutions: Catching the Deliberative Wave” (Highlights 2020)<sup>3</sup> which, among many other things like providing a solid guide and listing fundamental principles and practices of public deliberation, comprehensively illustrates the advantages of deliberations, which constitute the first and major lesson learned from the offline deliberative process held in 2022 in Lombardy for the regional authority involved. The Italian translation of the Highlights 2020 of the OECD report “Innovative Citizen Participation and New Democratic Institutions: Catching the Deliberative Wave” was presented online on 25<sup>th</sup> October 2021 during a TRANSFORM webinar (in Italian) open to everyone<sup>4</sup>.

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<sup>4</sup> The launch event, named from the translated report “Innovazione nella partecipazione dei cittadini al decision making pubblico e nuove istituzioni democratiche. Cavalcare l’onda della deliberazione”, took place online. The contents of the report were presented by Alessandro Bellantoni, Head of the Open Government and Civic Space Unit of the OECD. The event provided also the opportunity to dialogue with experts in and policy makers experiencing public deliberation: Ângela Guimarães Pereira (Joint Research Center, Ispra – European Commission), Caterina Cittadino (National Commission for Public Debate – Italian Ministry of Sustainable Infrastructure and Mobility), Enza Cristofaro (Directorate General for Education, University, Research, Innovation and Simplification – Lombardy Region), and Daniela Ferrara (General Directorate for the Economy of Knowledge, Labor and Business – Emilia-Romagna Region). The event was introduced and moderated by Angela Simone, coordinator of TRANSFORM and Lombardy Cluster leader.



## Regional context.

Lombardy, with more than 10 million inhabitants, is the most populated region of Italy, the third most populous region in Europe and one of the richest territories in the EU.

Its economic system is mainly focused on small and medium sized enterprises and its economy is specialized in all the traditional 'Made in Italy' sectors but more and more also in the new and emerging technologies-related ones. Entrepreneurship in Lombardy is both widespread and dynamic, and it shows an international standard in the search for innovation, development and technology. Lombardy is one of the most specialized areas in Europe for technologically advanced products.

The role of Lombardy in relation to national R&I effort is central. 18 percent of fablabs and 26 percent of certified incubators are based in Lombardy. Nine dynamic technological clusters do include as associated members companies, universities, research bodies and other public/private actors that are geographically distributed on the regional territory and do focus on specific technological areas. The university system in Lombardy comprises 13 universities: seven public universities, five private universities and one higher education centre. In addition to universities, Lombardy hosts several prominent centers for research, both private and public, among which there are twelve institutes of the National Research Council (CNR) out of 107 in Italy and 17 teaching and research hospitals (out of 42 Italy-wide). In Lombardy there are six science and technology parks, active in the energy, agri-food, aerospace, life sciences, bio- and nano-technologies, and new materials sectors.



Moreover, Lombardy's industry and research are present in numerous platforms and initiatives at European level, like the "Four Motors for Europe"<sup>5</sup>.

Smart Specialisation Strategy is a key instrument for the Region in order to promote specific, place-based research and innovation. Lombardy Region assigns a strategic role to research, innovation and technology transfer for the sustainable development of its territory, the competitiveness of the economic and productive system, the cohesion and quality of social relations, the growth of human capital and the wellbeing of citizens. In recent years, despite the continuing contraction in available resources, Lombardy Region has devoted ever greater support to research and innovation.

The model of innovation promoted by Lombardy Region is oriented towards the well-being of the community and focuses on themes and areas that represent a priority for society. Thus, Lombardy Region is not new to Responsible Research and Innovation (RRI), which has been officially institutionalised within the regional framework in 2016 with the regional Law "Lombardy is Research and Innovation", aimed at re-structuring Lombardy's Research and Innovation ecosystem so to enhance competitiveness of the economic and the production system, improving its policies on research, innovation, technology transfer and advanced training, in synergy with public and private entities. With this Law, the Lombardy Region has introduced both a new form of regional innovation governance and related strategic support tools into the regional system of research and innovation, namely:

- the Three Years' Strategic Plan for Research, Innovation, and Technology Transfer (PST), which provides the framework for the governance of Research

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<sup>5</sup> In 1988, the regions of Auvergne-Rhône-Alpes (France), Baden-Württemberg (Germany), Catalonia (Spain) and Lombardy (Italy), which together account for approximately 9% of European economic output, signed a cooperation agreement constituting the network of the "Four Motors for Europe", one of the first European networks of regions. The goals of collaboration in 1988 were primarily related to economics and research as well as to art and culture. In the course of the following decades the scope and intensity of cooperation and mutual learning grew notably (economic development, research and innovation, training and higher Education, climate and environment, transport and mobility, health, agriculture, civil society and the arts).



and Innovation at the regional level for 3 years and it is tightly connected to the regional S3 plan;

- the Open Innovation Platform, a virtual space where the Regional Government, industrial players, academia representatives and other societal actors can dialogue.

In this realm, Responsible Research and Innovation (RRI) approach plays a key role. In fact, RRI has been enshrined in the Law as one of the founding principles (article 3) and several activities have been foreseen to accomplish the goal of spreading the culture and the implementation of RRI, such as the Regional Forum for Research and Innovation, an independent body composed of ten international experts on science and society related issues that was established to advise on the responsible governance of regional Research and Innovation.

The role that the regional government is called upon to play in supporting innovative activities is of primary importance and can be articulated in different but complementary ways: as a coordinator of the actors in the territory, as an agent stimulating innovative activities through co-financing and fiscal measures that are complementary to national and European ones, as a promoter and facilitator of innovation processes, as a regulator in its areas of competence, as a user of innovative tools to update and adapt public administration services.

The principles of responsible research and open innovation, which are the basis of the regional approach, drive the Region towards a shared planning of innovation policies and instruments in which actors and citizens assume the dual role of beneficiaries and active players. In this way the regional government responds to society and to local actors, who strongly demand an open discussion on the management of innovation, focusing on the citizens' needs.



## **Actions.**

In Lombardy, under TRANSFORM, there were three different phases of participatory actions for different local R&I policymaking purposes, all of them connected to the local S3 2021-2027:

- *Survey* (From Fall 2020 to Spring 2021) -> 3 Years Strategic R&I Program as a whole;
- *Online deliberative workshop* (From Fall 2020 to Spring 2021) -> A specific section (*Sustainability Ecosystem*) of the 3 Years Strategic R&I Program;
- *Citizens' Jury* (from October 2021 to June 2022) -> Data-driven Smart Mobility policies.

### ***Survey on citizens' needs to inform the 3 Years Strategic R&I Program***

As it was in the design of the previous regional strategic programs of Lombardy Region (Three-year Strategic Program for Research, Innovation and Technology Transfer-PST 2018-2020 and S3 Plan 2021-2027), the identification of citizens' needs, to which research and innovation try to provide answers with technological and knowledge solutions and options, played a key role in the preparation of the new PST (2021-2023).

Building on regular meetings and exchanges, the partners composing the Lombardy cluster of the project (Giannino Bassetti Foundation, FGB, coordinator of the project and of the Lombardy cluster, Lombardy Region and Finlombarda) decided to focus the first part of the citizen engagement activities within TRANSFORM on the identification of the citizens' needs.



## Methodological note

The questionnaire, designed by Giannino Bassetti Foundation in dialogue with Lombardy Region and Finlombarda, was administered to a sample of 1002 people. The sample, representative of Lombardy population, was composed of adults (more than 18 years old) living in Lombardy and calibrated by age (*Figure 1*), gender (*Figure 2*) and province of residence (*Figure 3*).

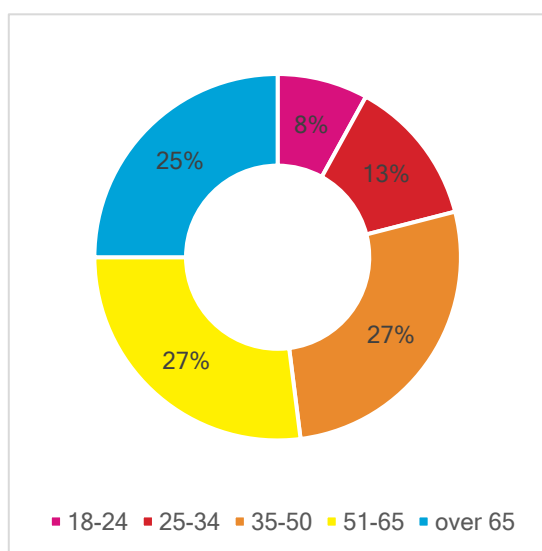


Figure 1 – Composition of the sample: age (survey)

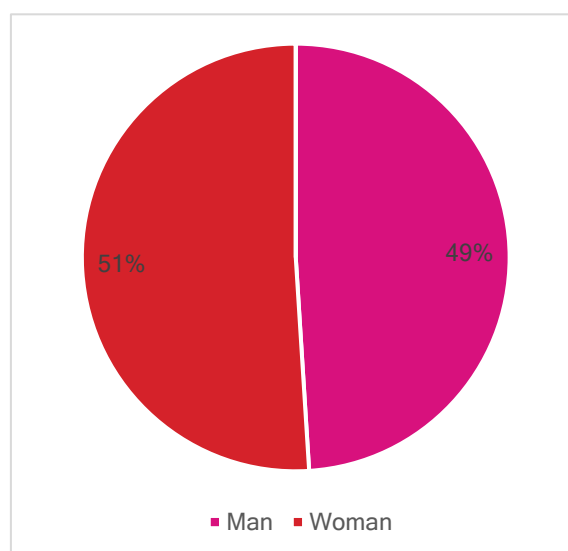


Figure 2 – Composition of the sample: sex (survey)

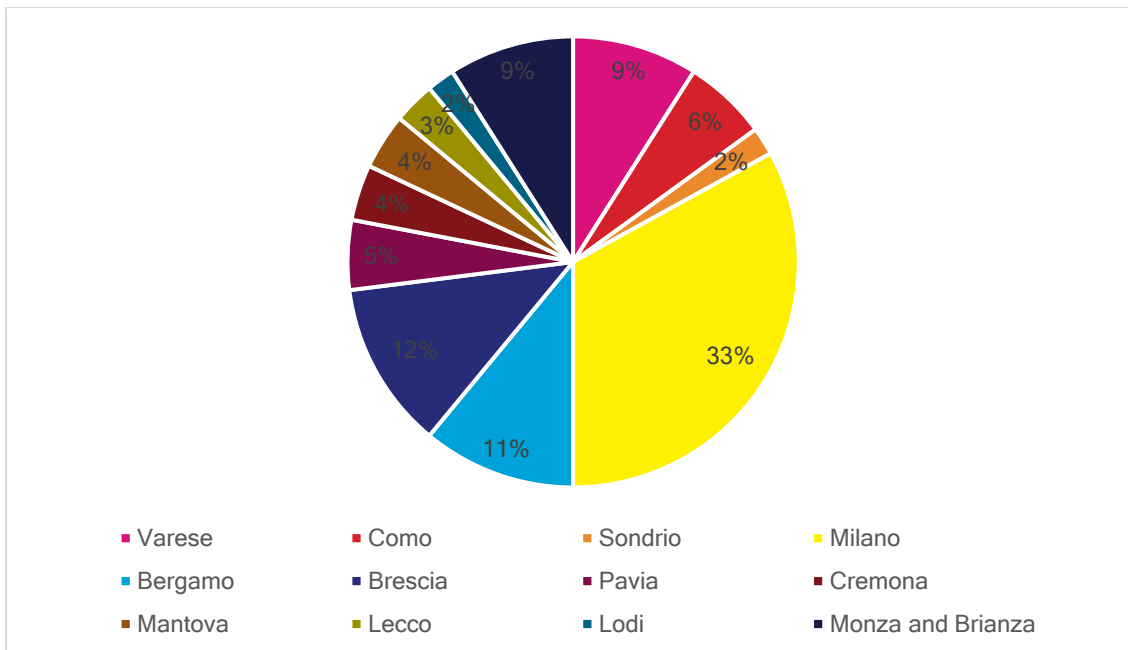


Figure 3: Composition of the sample: province of residence (survey)

During the interview phase, additional socio-demographic information were also collected (section I), such as the type of residence area (urban/suburban/rural/none of these), the size of the family unites, the presence in the family unit of people over 60 years old, under 14 years old and non-self-sufficient.

The survey was administered between April, 20 and April, 28 2021 through both CATI (Computer Assisted Telephone Interview) and CAWI (Computer Assisted Web Interview) instruments to diversify the access to the survey. The goal was to broaden the participation to different segments of the population, guaranteeing that the sample was truly representative of citizens in Lombardy.

In the sampling and administration activities, FGB was supported by an external Italian agency specialized in research and opinion polls (SWG).

The survey was designed keeping in mind the descriptions and categories of needs that were identified in the prior regional strategic programs on research and



innovation, so as to collect actionable information by Lombardy Region and Finlombarda in the definition of the PST 2021-2023.

The questionnaire, consisting of 15 questions, was divided into 4 sections (Annex I):

- I. *General information* (General socio-personal information)
- II. *The needs of the Lombardy territory* (Needs perceived by respondents in relation to the Lombardy territory)
- III. *The needs of Lombardy citizens* (Needs of the interviewees with reference to their household)
- IV. *Designing research and innovation priorities in Lombardy* (Which territorial actors should Lombardy Region engage when shaping its R&I strategies).

In the set of questions collected in Section II, participants were asked to indicate what they thought were the most urgent goals for Lombardy territory. The objectives presented in the questionnaire were the result of a reshaping and contextualization of the Sustainable Development Goals (SDGs) of the United Nations 2030 Agenda - parameters widely used in regional planning policies in Lombardy and thus also present in the current S3 (2021-2027) and in the PST 2018-2020 – on the basis of Lombardy peculiarities.

Respondents were then asked to provide their views on the impact that the Covid-19 pandemic had had on the objectives listed in the interview.

After selecting the territory's two most pressing priorities, respondents were asked to comment on possible responses to solve the selected target.

The third section of the survey focused on the personal and family needs of citizens. In the context of personal and family needs, it was then asked whether research and innovation could address the needs identified as priorities.





The fourth section of the survey focused on the types of actors to be involved in the design of the Lombardy Region's research and innovation policies.

The results were analyzed and collected in a report (in Italian) by Bassetti Foundation and sent and presented to Lombardy Region 15 days after the results were sent by SWG to Bassetti Foundation.

All the results have been published and can be retrievable on the section devoted to TRANSFORM in the Lombardy regions' Open Innovation portal<sup>6</sup>.

## ***Online deliberative workshop to inform the 3 Years' Strategic R&I Program's section "Sustainability Ecosystem"***

Based on the results of the survey, it was evident that the topics regarding the broader field of sustainability were priorities for Lombardy's citizens. For this reason, in selecting the focus of the deliberative workshop, it was decided to focus on this domain. Following a further discussion among the Lombardy cluster, the field of action was restricted to the topic of Energy. Subsequently, the theme was finalized in the subject "Fair energy transition for all" to combine technical and scientific aspects with social implications unavoidable in this context, to embrace the sustainability theme in a comprehensive way (also including its social dimension) and not only in a merely environmental meaning.

### **Methodological note**

The deliberative workshop was conducted on May 29, 2021. Given the persisting pandemic situation, even if the workshop was not organized in a period of particular

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<sup>6</sup> <https://www.openinnovation.regione.lombardia.it/it/iniziative/transform-eu>



restrictions, it was used the online format, hosting the dialogue on the Zoom platform.

The workshop alternated moments of plenary discussion, moderated by a main facilitator, with moments of dialogue in smaller groups of 6 people (through breakout rooms), always moderated by a facilitator. The groups were each time re-sorted to allow a wider sharing of perspectives among all participants.

The duration of the workshop was 8 ½ hours total (9:30 am-6 pm), with a one-hour lunch break and two mid-morning and mid-afternoon half-hour breaks.

A sample of 18 citizens residing in Lombardy participated in the workshop, selected randomly but stratified by gender, province of residence and age. The size of the province had determined the presence of more people from some provinces. The distribution of participants is illustrated below:

| Gender/Age | 18-34 | 35-54 | 55 and over | Total |
|------------|-------|-------|-------------|-------|
| M          | 2     | 3     | 3           | 8     |
| F          | 3     | 4     | 3           | 10    |
| Total      | 5     | 7     | 6           | 18    |

*Table 1 – Age distribution of participants (deliberative workshop)*

| LOMBARDY PROVINCE |   |
|-------------------|---|
| BERGAMO           | 2 |
| BRESCIA           | 2 |
| COMO              | 1 |
| CREMONA           | 1 |
| LECCO             | 1 |
| LODI              | 1 |
| MANTOVA           | 1 |



|                 |    |
|-----------------|----|
| MILANO          | 4  |
| MONZA E BRIANZA | 1  |
| PAVIA           | 1  |
| SONDRIO         | 1  |
| VARESE          | 2  |
| Total           | 18 |

*Table 2 - Province of residence of participants (deliberative workshop)*

Even if the small number of participants cannot obviously be representative of the entire reference population involved in the deliberative exercise, the search for a diversity of voices, according to the parameters presented above, ensures heterogeneity of experiences and personal and professional paths, as well as geographical contexts, necessary for the success of these interventions of citizen engagement.

The recruitment of the 18 citizens was carried out by an agency specialized in qualitative surveys (Almar Qualitative Research). The same agency, in the costs of the service, has included a monetary incentive (given through PayPal) to the participants.

The workshop followed a structured format designed by Bassetti Foundation and moderated by the Bassetti Foundation team and an external professional facilitator.

The workshop followed the general format of deliberative dialogues, with a tight schedule, that has undergone some changes in terms of timing during the course of the event, and these elements:

- A first informative phase in which participants are introduced to the scope of the workshop, to the broader context (in this case the TRANSFORM project and the activities conducted within the Lombardy cluster) and to the focus



on the topic, thanks also to the presence of experts with whom participants can interact with;

- A discussion phase to bring out the points of attention on the topic to be discussed;
- A final phase to formulate recommendations and consensus on the recommendations.

In the first phase, the main facilitator illustrated the objectives of the day and the agenda of activities. Subsequently, the main facilitator presented the TRANSFORM project and the activities of the Lombardy cluster, within which the participatory path and in particular the workshop were inserted, providing some more specific information on the energy transition subject.

The informative phase on the subject was based on the display of a video interview with an Italian researcher among the most cited in the international literature, and on the presence of an expert who illustrated the possible options/technological solutions/research guidelines that the world of research/innovation (especially local) can put in place to facilitate energy transition. Participants had the chance to interact with the expert.

In the dialogue phase, in the first breakout rooms, the groups shared what they thought were the actions to be taken to initiate an energy transition in Lombardy. In each group, the various actions listed were clustered by the group facilitator, in agreement with the participants, into macro-areas. At the end of this session, participants were sent to vote, using the Zoom platform's polling features, on the 3 macro-areas considered a priority for them.

In the following phase, participants were asked to identify issues as well as "social justice" opportunities for each selected macro-area and possible responses, to prepare a basis for the subsequent development of recommendations



The last stage of the workshop focused on the development of recommendations. Each group worked on two of the three macro-areas, followed by an overall integration in the plenary and the finalization of the collective consensus.

At the end of the workshop, participating citizens were asked to fill out a questionnaire prepared by the Bassetti Foundation.

The recommendations were collected in a report (in Italian) by Bassetti Foundation and sent and presented to Lombardy Region a week after the workshop took place.

All the results have been published and can be retrievable on the section devoted to TRANSFORM in the Lombardy regions' Open Innovation portal<sup>7</sup>.

## ***Citizens' Jury to inform regional (data-driven) Smart Mobility policies***

In order to foster a development of mobility that is aligned with the needs and characteristics of the region, Lombardy Region drew up the 'Smart Mobility and AI' strategy in 2020. To build a shared vision and plan activities, the Lombardy government consulted regional players active in the sector - such as research institutions, companies, and civil society organisations - and identified four priority action areas, including 'connectivity and data'. The digitalisation of mobility and the collection of information on citizens' movements make it possible to plan and manage transport and mobility services in a new and efficient way, but not without social and ethical implications, e.g., in terms of privacy, inclusion of the most vulnerable, accessibility.

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<sup>7</sup> <https://www.openinnovation.regione.lombardia.it/it/iniziativa/transform-eu>



The Citizens' Jury, organised in Lombardy as the final part of the TRANSFORM project, was thus meant to identify the responsibility-related issues linked to smart (data-driven) mobility directly from the voice of citizens. The final aim of the Citizens' Jury was to provide Lombardy Region with recommendations for developing services in this area that are as close as possible to citizens' expectations, needs and values.

## **Methodological note**

In the Lombardy Citizens' Jury, designed, organized and conducted by Bassetti Foundation, the jurors met for two full days, on 11 and 25 June 2022, from 9.30 am to 5.30 pm. The discussion took place in plenaries and breakout sessions and was conducted by professional facilitators (from Bassetti Foundation and an external agency, Istituto Piepoli, which was also responsible for selecting the participants and rewarding them).

The Jury was attended by 24 citizens on the first day and by 22 citizens on the second day, all of them were over 18 and resided in Lombardy. The 22 citizens who gathered for the second day had also taken part in the first one. The sample was balanced by gender, age and province of residence. The selected group was mixed also in terms of other socio-demographic factors, such as income and educational qualification, to ensure a diversity of voices and a heterogeneity of experiences and points of view, which are needed to guarantee a proper implementation of the initiative.

The jurors met for the first time on 11<sup>st</sup> June, and the day was dedicated to the information phase and in particular to:

- presenting the TRANSFORM project and the Jury (by Giannino Bassetti Foundation)
- introducing the policies and activities of Lombardy Region on smart mobility (by Lombardy Region)



- describing the Lombardy Region's E015 platform, which collects various types of data and makes it available to everyone to develop new services for citizens and businesses (by E015)
- giving citizens the chance to dialogue with five experts on data, mobility and related responsibility issues, such as big data and AI, open data, mobility of the future and its technology, privacy and techno-surveillance in smart cities, gender and mobility.

The second day focused on the discussion phases, in order to identify issues of responsibility and possible social impacts of data-driven smart mobility, and deliberation to elaborate the actual recommendations and deliver them to the Region, in particular had the aim of:

- identifying elements of responsibility to be taken into account when drafting the recommendations;
- drafting and refining the recommendations;
- delivering the recommendations to Lombardy Region.

During the morning of the second day, citizens identified issues of responsibility related to the development of data-driven mobility services. The discussion took place in three groups, starting with the presentation of eight 'cards', each representing a hypothetical data-driven intelligent mobility service (e.g., smart traffic lights, smart parking, on-demand bus). The results were then presented in plenary.

In a second phase, starting from the themes of responsibility, citizens elaborated and refined recommendations. For each theme, the recommendations were organised into 1) objectives and 2) measures that contribute to the achievement of each objective.



In the final part of the second day, the recommendations of the citizens, drawn up and unanimously approved by the Jury, were formally handed over to the commissioning public authority, Lombardy Region. Three representatives of the jurors read out the recommendations in the presence of two representatives of the regional administration. Lombardy Region committed to taking citizens' ideas and suggestions into account in its future actions in the area of smart mobility and, should it not be possible to incorporate them, for example in the case of requests that do not fall within the remit of the regional authority, to explain the reasons for this.

At the end of the workshop, participating citizens were asked to fill out a questionnaire prepared by the Bassetti Foundation.

The recommendations were collected in a report (in Italian) by Bassetti Foundation and sent and presented to Lombardy Region a couple of weeks after the second day of the Citizens' Jury took place.

All the results have been published and can be retrievable on the section devoted to TRANSFORM in the Lombardy regions' Open Innovation portal.





## Impact.

### ***Impact on Lombardy Region R&I policies***

This section provides an overview of TRANSFORM impact on the regional R&I policies and governance, based on data available to date. The Unit of Lombardy Region taking part to TRANSFORM and committed to the implementation of citizens' views was the General Directorate Education, Research, Innovation and Simplification (Regional Government).

Three main policies have been impacted by the project:

- The [Three Years' Strategic Plan for Research, Innovation, and Technological Transfer \(PST\)](#)
- The [Regional Smart Specialization Strategy 2021-2027](#) (S3)
- S3 implementation: Regional Smart mobility and AI policies and actions.

### **Impact of TRANSFORM on the Three Years' Strategic Program for Research, Innovation, and Technology Transfer (PST) and connected documents**

The [Three Years' Strategic Program for Research, Innovation, and Technology Transfer \(PST\)](#) provides the framework for the governance of Research and Innovation at the regional level for the coming 3 years and was introduced by law in 2016 (Law n. 29 of the 23<sup>rd</sup> of November 2016 "Lombardy is Research and Innovation"). The PST 2021-2023 was approved by regional Government in 2021 (DGR n. XI/5117, 2<sup>nd</sup> of August 2021) and then transmitted to regional Parliament, which also approved the Program in 2021.



Thanks to TRANSFORM, Lombardy Region has reinforced its commitment towards RRI by adopting more solid citizens engagement models, to include public views, needs and expectations in the design of the Program. The importance of TRANSFORM in the design of PST is revealed from the first chapter of the Program, in which the project is presented in a specific box devoted to RRI and public participation and the participatory process is described into details (paragraph 1.1 *Percorso partecipativo strutturato*).

The participatory activities conducted by TRANSFORM from April to May 2021 were intended to identify directly from the voice of citizens' the public and territorial needs that are at the basis of the regional R&I ecosystems described in the PST<sup>8</sup>.

TRANSFORM actions are described in chapter 3 of the Program and the outcomes of the dialogue with citizens have been included in the description of the needs at the basis of each ecosystem (the project results were particularly significant for the "Sustainability Ecosystem", being the TRANSFORM deliberative workshop focused on just energy transition for all).

Furthermore, TRANSFORM is explicitly mentioned in the ecosystems as described in the following table (Table 3).

| Ecosystem | Needs identified/confirmed thanks to TRANSFORM                             |
|-----------|--|
| Nutrition | More people who regularly eat enough<br>More people accessing quality food |

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<sup>8</sup> "I bisogni dei cittadini attorno ai quali si formano gli ecosistemi, rilevati in precedenza da studi ed esperienze degli stakeholder e dei policymaker regionali, sono stati confermati dagli esiti del coinvolgimento diretto di un campione rappresentativo dei cittadini lombardi, grazie al progetto TRANSFORM. Questo conferma in maniera chiara che questi bisogni sono effettivamente presenti e fortemente percepiti prioritari per il territorio lombardo, così da tracciare un percorso di continuità con la consapevolezza di corrispondenza con le reali opinioni dei cittadini."



|                               |   |
|-------------------------------|---|
| Health and life-science       | More people living in health and well-being (in terms of health)  |
| Culture and knowledge         | More children with high-quality school education  |
| Smart mobility e architecture | Improved mobility infrastructure (railways, roads, etc.)  |
| Social Development            | More people with decent job<br>More and better services to support marginalized or disadvantaged categories<br>Equality between men and women |

Table 3 – Ecosystems and needs explicitly identified thanks to TRANSFORM

As required by the Law 29/2016 “Lombardy is Research and Innovation”, the regional Government provides the Regional Parliament with a report on the implementation and the results obtained in promoting and supporting the regional R&I ecosystem on an annual basis, which is called (in Italian) “*Clausola Valutativa*”. With this process, the Regional Parliament assesses the regional Government’s actions on R&I.

In 2021, in the section “SPS1 – Experimentation and Strategic Projects”, TRANSFORM has been described as an initiative promoting RRI to foster transparency and societal participation into strategic policy making (and therefore contributing to the implementation of the Law 29/2016 “Lombardy is Research and Innovation”<sup>9</sup>). The report extensively describes TRANSFORM also in the introduction (art. 2.2)<sup>10</sup>.

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<sup>9</sup> La Direzione Generale IURIS ha aderito al progetto europeo TRANSFORM -Territories as Responsive and Accountable Networks of S3 through new Forms of Open and Responsible Decision-Making, approvato nell’ambito della call Horizon 2020 - Supporting the development of territorial Responsible Research and Innovation. Il tema del progetto, la promozione della RRI, si inserisce tra quei “fattori abilitanti” finalizzati alla valorizzazione delle iniziative di R&I che incentivano, non solo la trasparenza della PA, ma anche la partecipazione della società nelle scelte programmatiche.”

<sup>10</sup> “La promozione della Ricerca e Innovazione responsabile è il tema del progetto europeo a cui Regione Lombardia ha aderito nel 2020: TRANSFORM - Territories as Responsive and Accountable Networks of S3 through new Forms of Open and Responsible Decision-Making, approvato nell’ambito della call Horizon 2020 - Supporting the development of territorial Responsible Research and Innovation. Il partenariato è formato da regioni, università e realtà appartenenti a 4 aree: Lombardia, Bruxelles, Catalogna, Boston. La sperimentazione avviata con il PST 2021-2023 rappresenta un passo importante verso l’affermazione di un paradigma che potrà essere incorporato in progetti futuri per una ricerca e innovazione che siano sempre più in linea con le esigenze



## **Impact of TRANSFORM on the Regional Smart Specialization Strategy 2021-2027 (S3)**

The Lombardy [Regional Smart Specialization Strategy \(S3\) 2021-2027](#) was approved in 2020 (DGR n. XI/4155) and updated in 2021 (DGR XI/5688). The strategy enables the Region to identify and develop its own competitive advantages and is strongly connected to PST actions.

While representatives from Lombardy Region (General Directorate Education, Research, Innovation and Simplification) and Finlombarda Spa were working on S3, they were also experimenting capacity building and mutual learning activities on RRI and public deliberation for policy making as partners of TRANSFORM Lombardy Cluster (together with Giannino Bassetti Foundation). These activities resulted in an increased awareness on the importance of engaging citizens in the design of R&I policies and thanks to the TRANSFORM journey, the Strategy identifies participatory governance as one of the main challenges for Lombardy Region (together with the digital transition, the sustainable development, and the resilience of the economic system).

The TRANSFORM experience is explicitly mentioned in the strategy (page 10) in a specific box on the project and also Chapters 2 of S3 is built on TRANSFORM principles: “RRI principles, applied in the former S3 will be applied with an increased awareness and variety – direct engagement, public consultation, citizens

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del territorio e dei suoi abitanti. I principi dell’RRI sono stati integrati stabilmente nella pianificazione regionale e in particolare nei due documenti strategici principali: oltre al Programma Strategico Triennale per la Ricerca, l’Innovazione e il Trasferimento Tecnologico (PST), anche nella Strategia di Specializzazione Intelligente (S3). Alla consultazione aperta, utilizzata in precedenza per la predisposizione del PST 2018-2020 e pubblicata sulla piattaforma regionale Open Innovation, a cui potevano partecipare tutti i cittadini, si è aggiunto un percorso strutturato dove il campione è selezionato a garanzia della rappresentatività di tutto il territorio per età, sesso, provenienza ecc. La missione di TRANSFORM è infatti quella di mettere a punto e testare nuovi strumenti per permettere che il processo di elaborazione e attuazione dei documenti strategici e delle politiche regionali avvenga in modo aperto e inclusivo”.



engagement exercises – also in the new Strategy. The direct engagement of territorial stakeholders [...] and citizens in the process to define the technological development priorities and the frequent use of public consultation and other citizens’ engagement exercises that will be used and experimented during the seven years respond to the need to identify research priorities able to respond to social needs in a participatory way”<sup>11</sup>.

## **Impact of TRANSFORM on S3 implementation**

Lombardy Region drew up a 'Smart Mobility and AI' strategy in 2020. In line with this strategy, in 2022 the General Directorate Education, Research, Innovation and Simplification developed a funding initiative (approved by Regional Government on the 30<sup>th</sup> of June 2022) to foster the development of mobility services based on data.

The initiative was developed in the form of a dual call for funding, named “Smart Mobility Data Driven”, composed by 1) a [call for interest](#) (launched in 2022) and 2) a call for funding, which will be launched in 2023.

Scope of the initiative is to develop innovative services for accessible, secure and sustainable mobility thanks to the implementation of digital infrastructures and digital data sharing.

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<sup>11</sup> “La legge regionale 29/2016 “Lombardia è Ricerca e innovazione” introduce inoltre il concetto di Ricerca e Innovazione Responsabili (RRI). La RRI implica che tutti gli attori sociali (ricercatori, policy maker, imprenditori, rappresentanti del terziario, cittadini etc.) collaborino durante tutto il processo di ricerca e innovazione, fin dall’inizio al fine di allineare al meglio il processo stesso e i suoi risultati ai valori, ai bisogni e alle aspettative della società. I principi alla base della RRI utilizzati in più occasioni nell’ambito della precedente S3, saranno applicati con maggiore consapevolezza e varietà – coinvolgimento diretto, consultazioni pubbliche, esercizi di citizen engagement – anche nella nuova Strategia. Il coinvolgimento diretto degli stakeholder territoriali (imprese, università e centri di ricerca, associazioni) e dei cittadini nel processo di definizione delle priorità di Sviluppo tecnologico e il ricorso frequente a consultazioni pubbliche e ulteriori esercizi di citizen engagement che verranno utilizzati e sperimentati nel corso del settennio, rispondono alla necessità di identificare, con modalità partecipative, priorità di ricerca in grado di rispondere ai bisogni sociali.”



The design of the first stage of the call was informed by the outcomes of TRANSFORM Citizens' Jury on Responsible Smart Mobility, which collected citizens' views and ideas on the responsibility aspects of data-driven smart mobility.

The responsibility elements (e.g., accessibility to digital tools, privacy and cybersecurity) have been inserted in the call for interest as key features on which applicants need to reflect and provide information when submitting their proposals.

Lombardy Region committed to take into account the outcomes of the Citizens' Jury also in the second stage of the call for funding, which will be launched in 2023, as well as in its strategic documents and actions on smart mobility in the near future.

### ***Impact on regional R&I ecosystem***

Apart from the Unit involved In TRANSFORM, other regional units as well as R&I regional stakeholders have been informed about the activities conducted in the realm of the project and its results.

TRANSFORM approach and outcomes were presented in meetings with representatives from all regional units (September 2021 and October 2022), organized by the Regional team involved in TRANSFORM also in charge of coordinating the design and the implementation of strategic regional R&I documents (S3 and PST).

TRANSFORM was also presented, and its results shared in meetings organized by Lombardy Region with representatives from regional R&I ecosystem (universities, industries, research centers, professional associations), namely Lombardy Technological Clusters (October 2021).

These activities also resulted in one-to-one meetings with specific regional units interested in implementing citizen engagement actions and with innovators from Lombardy Technological Clusters.



It is also worthwhile to mention that the experts recruited for the informative stage of TRANSFORM participatory processes were selected – when possible – from the regional R&I framework. A representative from the Lombardy Energy Cleantech Cluster was engaged in the informative stage of the deliberative workshop on fair energy transition, and a representative from the Lombardy Mobility Cluster took part as expert in the Citizens’ Jury on Smart Responsible Mobility. This choice was very important to both guarantee that the expertise was contextualized within the regional framework in which the policies needed to be developed and to raise awareness among experts about the responsibility aspects of technologies.

## ***Impact on citizens***

After both the deliberative workshop on Fair Energy Transition for All and the Citizens’ Jury on Responsible Smart Mobility, Giannino Bassetti Foundation provided participants with evaluation forms to assess their views on the participatory process implemented, collecting feedbacks and ideas to be taken into account for similar initiatives in the future.

Citizens’ answers from both evaluation forms indicate that there is strong interest for the implementation of deliberative initiatives engaging citizens in regional research and innovation policy making (and policy making in general).

Four main motivations are at the basis of the positive reception of TRANSFORM actions by citizens engaged in the process:

- The opportunity to have a say in the regional decision making and take action (“I felt being active as a citizen for the first time”; “I liked being involved”; “Finally I had a chance to have a voice”)
- The opportunity to share ideas and concrete experiences, contributing to building a better future for all (“Inclusiveness is to me one of the most important issues, also because it concerns me personally”; “Everyone can really contribute”)



- The opportunity to debate with other citizens from different contexts within Lombardy, understanding the needs of the territory as community (“I liked to have the opportunity to discuss with other citizens”; “I liked to resonate on how avoiding exclusion of some groups of people”; What I liked the most was discussing together”)
- The opportunity to learn from experts about the two topics at the center of the deliberative process (i.e., fair energy transition for all, smart mobility data driven), which participants considered very relevant (“We have discussed a lot of interesting issues”; “The topic was very interesting”; “I have learned a lot of new things”).

Participants agree with the adoption of public deliberation for policy making and think that citizens can contribute to the debate on energy transition and smart mobility. Also, they ask for more of these initiatives and for more time to discuss (“It would have been nice to discuss further, but time was running out. I hope that we will meet again for an update”).

A change of attitude by some initially skeptical participants was registered (especially in the citizens’ jury that unfolded on two days), which is in line with studies showing that deliberative processes are a powerful tool to increase trust between different societal actors (in this case citizens and policy makers).

The citizens jury was also key in clarifying to participants the different roles and actors engaged in research and innovation policy making, also distinguishing the different responsibilities at different institutional levels (regional, national, European, etc.).





## Practical guidelines.

The grounding of deliberative processes, could be complex, depending on the level of knowledge, maturity and practice in the institutional context in which the deliberative exercise will be embedded. First, procedural constraints can heavily affect the good implementation of the methodology or at least could entail more effort and time in develop a proper process. Furthermore, dialogue with preparation of key actors and material in the process needs to be carefully considered so as to produce high-quality results that are meaningful for the involved citizens and actionable by the committed public authority.

Knowing in advance what could be the bottlenecks that can be turned into opportunities might help potential organizers to plan correctly timing, procedures and phases, before overpromising implementation and results in short term to the public authority interested in setting the exercise or publicly launching the process.

Here following some of the practical hurdles, that we have encountered in the making, from which we have learnt, and that we suggest to take into account in a potential design and setting up of public deliberation for policy making actions in a regional context:

- *Be ready to be flexible (but not on quality!)*

Implementing deliberative processes requires flexibility for several reasons. First, unexpected events could happen within the public administration committed in the process: staff turnover, early elections, new upcoming priorities, changing competences within the regional organisation, etc. As it was in the case of TRANSFORM, the choice of the issues (and policies) to be at the center of the deliberative process can change, as well as the policy cycle timing, etc. This need for adaptation becomes particularly true when the deliberative process needs to be framed not only within the regional authority framework, but also within a specific



project (as it was in the case of TRANSFORM). Pairing the regional administration timeline with the project timeline required a lot of adaptation in terms of questions framing, timing, methodological choices, etc.

→ Be ready to adapt to rapidly changing conditions. Less could be more to guarantee a high-quality process in changing conditions.

- *Civic lottery vs. recruiting agency*

Having randomly selected citizens is an essential part of a deliberative process since can guarantee to gather all kind of views, perspectives and then recommendations, avoiding the collection of suggestions just from the “usual suspects” (people already interested in that topic or willing to participate in this type of exercise whatever the topic is or even worst engaged for vested interests). To run an ideal civic lottery the institution in charge of promoting the deliberative process needs to store and process or at least access citizens’ data at population level. These datasets are not available at any level (local, regional, national, etc.) since the collection or processing – even more after the entry into force of the EU General Data Protection Regulation – is permitted only for a specific reason (elections, health system needs, etc). In our specific case, also because it was the first experience in implementing a deliberative process and the first attempt of using a civic lottery in Lombardy (and so there was no procedure in place for such purpose of inhabitants data processing), it was not possible for Lombardy Region to access citizens’ data in the region and deploy a civic lottery to randomly select citizens. In principle, this procedure is not impossible to be run but requires time and a joint effort of different departments in the Region to obtain these datasets and implement a proper Civic Lottery. The alternative – used in the TRANSFORM case – was to select citizens through recruiting agencies (specialized in qualitative research) to guarantee anyway a random distribution and a fair representativeness of the variety in the group to be part of the process, according to the criteria requested. Even if considered a more narrow and - by some scholars and practitioners of deliberative democracy - less robust approach, the agency selection can provide some



advantages to some extent. Because of the GDPR, personal data processing – especially in case of sensitive data – is not easy and very often public authority cannot “profile” citizens according to specific features (e.g. census) and this can affect a proper representation of the population in the “mini-public” for the deliberative process. Furthermore, specific groups of people (e.g., immigrants or students moving from other regions, might not be formally registered as citizens). Thus, even if civic lottery is a golden standard, further reflections on how to complement this approach to have a full representativeness in the Jury is needed.

→ Civic lottery is the golden standard but don't deny citizens recruitment through an agency or combined methods to ensure a broad representativeness in the mini-public.

- *Actions during, before and in between the deliberative process*

Even if the most part of the deliberative process obviously unfolds during the events in person, communications before (and in between of the meeting for example in the case of a citizens' jury) are really important both to set the stage and to reinforce information or provide more material that can be requested by the jurors. Especially in shorter processes (e.g., One day deliberative workshop or Citizens' Juries two-days long, as in our case) in which there is no much time to go extensively through information and discussion with the experts, communications in preparation of or after the first event are relevant to exploit the time in person for dialogue and deliberation and to complement the information phase with further in depth or on demand material.

→ Use properly the time in preparation of and in between of the Jury's meetings to provide information and material

- *“Witness experts” selection and briefing*

Selecting the right experts for the informative phase is key but this could require time. And even if you are able to prepare the perfect list of the experts in line with



your topic, they could be not available in the days of the Jury. Furthermore, even if experienced in delivering presentations to peers or stakeholders, they could be less prepared to provide good speeches for the general public. Thus, planning several briefing with them and preparing a list of suggestions on how to handle a public presentation, as done in our case, could be really useful to avoid “surprising” contents during the Jury events.

→ Dedicate enough time to select and brief the witness experts since their contents will be relevant for the framing of the dialogue and recommendations preparation.

- *R&I ecosystem actors as witness experts*

In the case of the participatory research agenda setting exercise in TRANSFORM, the process was an integral part of the design of regional strategic programs, like S3, which are typically conceived together with R&I ecosystems stakeholders (e.g. through the so-called Entrepreneurial Discovery Process – EDP). Such introduction of deliberative process and lay experts voices (namely the citizens) can be not well perceived by R&I ecosystem stakeholders. Explaining them the process but above all including some of them in the informative part is a way to provide them with first-hand experience that can foster their buy-in and support (or even enthusiasm, as in the case of Lombardy) so as to transform and enlarge the co-design processes for strategic regional R&I policies and plans.

→ Exploit deliberative approaches to create Societal Discovery Processes for strategic regional R&I policies and plans.

- *Recommendations as a way to read regional societal attitudes and awareness*

The main outcomes of the deliberative processes are the recommendations formulated by the citizens, but contents of the recommendations, apart from providing suggestions to guide local policymaking, can provide information on societal attitude or even knowledge about specific issues. For instance, in the case of our deliberative workshop some inter-generational conflicts connected to energy



transition have emerged when shaping the recommendations. And in our Citizens' Jury, many recommendations insisted on data protection and how to ensure that citizens are protected by potential misuse and abuse of their personal data. Most of these citizens' requests are already regulated as key elements in the GDPR. Thus, this means that there is no diffused awareness of the GDPR tool as a way to protect citizens' interests and rights. As a consequence, the public authority can invest on public courses and communication campaigns about the GDPR – also in conjunction with national authorities devoted to this theme - but can also reflect upon public perception – and perhaps potential controversy – on some technology because citizens believe there is a lack of public control on this topic. Thus, a deeper analysis of the recommendations beyond the primary meaning of those suggestions is advisable and provide a further level of benefit stemming from the implementation of such processes.

→ Read through the recommendations to capture societal perception, attitudes and knowledge to prevent potential innovation controversies.

- *Find the right channels to communicate and disseminate the actions implemented and the results obtained*

Communication and dissemination activities before, during and after deliberative actions are crucial part of the process in order to guarantee transparency, maximize the impact of citizens efforts and build trust between the public and public institutions. In TRANSFORM case, results were published (in Italian) on a dedicated page on the regional platform Open Innovation, which is a key tool for regional R&I stakeholders. This choice ensured that TRANSFORM process and results reached key actors of the regional ecosystem of research and innovation (industries, universities, professional associations and other intermediaries), contributing to further increasing a culture on public deliberation for policy making in the Region and ensuring that citizens views could be heard beyond the representatives from the regional public administration engaged in the project.



→ Upstream reflection on the best way to share information on the deliberative process implemented could be strategic: plan it in advance.

- *A clear explanation of different roles of actors taking part to the deliberative process is needed*

Citizens that take part to deliberative processes need to be clearly informed not only about the topics at the center of the participatory actions, but also about the different roles of the players taking part to the process (organizers, facilitators, committing public authority, experts, etc.). This is very important to ensure a smooth conduction of activities and flow of the discussion. Furthermore, to increase the effectiveness of the recommendations delivered to the public authority, the more the citizens are aware of the competences of the committing institution, the better.

→ During the first stages of the process, provide citizens with clear explanation on the different roles of the actors taking part to the process and possibly also foresee a session on the competences of the committing authority on the topic at the center of the discussion.

- *Select the topic carefully (and narrow down, if needed)*

Choosing a vast subject – as experienced in the deliberative workshop in TRANSFORM - and with links to other issues of public interest (i.e., bureaucracy, digitization) could make your life complex. In this case, a longer process could be ideal to unpack properly all the societal problems that can emerge. Sometime, in the context of a pilot workshop, a wide topic could be an advantage to sound out potential "hot" issues on the topic, that can be further explored in other and longer deliberative processes and by using other participatory methods.

→ Clearly define your aim in selecting the topic so as to render the process really actionable

- *Evaluate your process*



The process doesn't end up with the formulation of recommendations and the impact that they can produce. Discuss the quality and the implementation of the process with those who took part in it, starting from the institution which initiated the process but also involving the citizens participating in. TRANSFORM in Lombardy has provided the citizens with an ad hoc evaluation form at the end of each meeting to collect their views on the interest in such processes but also to improve the organizational elements of the events. Results are precious for both the organizers but also for the institutions that can learn about citizens' perceptions and views about their willingness of being active actors in (regional) policymaking.

→ Plan the distribution of the survey in advance so to collect the opinions of all the participants (preferably not online but in person at the very end of the process, when the participants have still vivid memories of all the phases).

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