



Digital Business Ecosystem

Contract n° 507953

## **WP35 : The European Research Area and DBE**

### **Del 35.1 : DBE integration with European and local policies: methodology and first actions**



**Information Society**  
Technologies

Project funded by the European Community under the "Information Society Technology" Programme

**Contract Number:** 507953  
**Project Acronym:** DBE  
**Title:** Digital Business Ecosystem

**Deliverable N°:** D35.1  
**Due date:** 30/05/2005  
**Delivery Date:** 21/06/2005

**Short Description:**

Describes the general methodological approach and specific actions that are initially envisaged to accomplish the work package WP35 during Phase II of the project. This WP links the DBE Project to the external world in terms of ICT standards, research policy, and recruitment of additional regions.

**Partners owning:** T6  
**Partners contributed:** IBM, CENSIS  
**Made available to:**

**VERSIONING**

VERSION	DATE	AUTHOR, ORGANISATION
1.0	26/05/2005	NEIL RATHBONE, JONATHAN SAGE, ANTONELLA PASSANI
1.1	27/05/2005	NEIL RATHBONE
1.2	16/06/2005	NEIL RATHBONE, GIANNI DOMINICI
1.3	21/06/2005	NEIL RATHBONE, JONATHAN SAGE, PETER STANBRIDGE

**Quality check**

**1<sup>st</sup> Internal Reviewer:** Mauro Giorgetti - T6  
**2<sup>nd</sup> Internal Reviewer:** Jonathan Sage, Peter Stanbridge - IBM  
**3<sup>rd</sup> Internal Reviewer:** Antonella Passani, Gianni Dominici - Censis

## WP35 The European Research Area and DBE (Coordinator T6)

### WP35 Introduction

The objective of this activity is to contribute to market presence and sustainability by engaging with external policy actors, thereby allowing the project to align itself with these at both local and EC level. An important aspect of this task is to support the ERA goals.

### WP35 Overview

The main thrust of WP35 is to monitor and influence policy-makers, particularly in relevant technical, economic, and research fields, so that the DBE is not only successful within itself, but takes its appropriate place in the European Research Area and in the development of Open Source Software and regional economic policies.

The task WP35 is part of the Sub-project SP11 - Sustainability and regional policy. The table below shows WP35 within the formal structure of SP11.

- SP11 - Sustainability and Regional Policy
  - WP33 - Dissemination (T6)
  - WP34 - Exploitation & Sustainability (TCH)
  - **WP35 - The European Research Area and DBE (T6)**

As such it has close links with the broader dissemination and exploitation activities, in particular WP34 Exploitation and sustainability, and is to a significant extent dependent on those activities producing awareness and materials that can act as the foundation for engagement with external actors in the policy domain.

WP 35 consists of :

- Task B19 & B36: Connection to standards bodies and to emerging market standards - The DBE is reliant on open standards and so needs to monitor and influence the standards process, as well as conform to it.
- Task B37: Integration with local policies and directives - Regions and their 'Regional Catalysts' are the connection between the DBE and the SME developers and end users who will make up the DBE community.
- Task B32: ERA and DBE growth - It is a fundamental necessity to link the DBE to research policy and the development of the ERA by mapping, monitoring, and analysing related policy and practice.

In addition to the above tasks that are specifically part of WP35, there is a lesser relationship with the tasks of the neighbouring Work Packages:

**WP33 - Dissemination (T6)**

- B30 - Marketing material and branding
- C34 - Web-presence
- C35 - Internet and intranet facilities
- B43 - Communication strategy & constituency building
- B31 - Events

**WP34 - Exploitation & Sustainability (TCH)**

- B16 - Exploitation strategies
- B7 - Business and marketing plan
- B44 - Market watch

**WP35 Resources**

The following are the person-month allocations for WP35.

Work package number	35	Start date or starting event:					18
Activity Type							
Participant id	T6	IBM	CENSIS	UCE	ITA	TCH	
Person-months per participant	6	10	7	1,5	3	3,5	

## WP 35 Coordination of Work Package

The following table lists the objectives, activities, and specific actions that will be adopted by T6 to coordinate the Work Package. It will be particularly important to integrate and coordinate as far as possible the individual tasks within WP35 and the related tasks described above in order to achieve the overall benefits foreseen.

The specific mechanisms for coordination will be:

Objectives	Activities		Actions
Encourage integration and coordination between tasks	1	Have a single overview of the interrelationship of tasks	<ul style="list-style-type: none"> <li>Produce a common position document</li> </ul>
Ensure successful implementation of WP	2	Monitor execution of Tasks and progress towards objectives	<ul style="list-style-type: none"> <li>Regular one-to-one communication with Task Managers</li> <li>Organise 6 monthly online conference of Task Managers to discuss progress towards WP objectives</li> </ul>
Resolve any obstacles to progress	3	Help Task leaders to articulate any problems and communicate them for resolution	<ul style="list-style-type: none"> <li>Act as intermediary between other WP leaders and the PMEB in resolving issues raised</li> </ul>

## WP35 Outputs

### Deliverables

D35.2.x Connection with Standard Bodies and market standards (Months 24, 33) - IBM  
D35.3 Synergies with local policies (Month 36) – T6  
D35.4.x Integration with ERA policy and strategy (Months 27, 36) – CENSIS & ITA

### Milestones and expected results

M35.2 Connection with standards (Month 33)  
M35.3 Synergies with ERA policies and Events (Month 36)

#### Measurable Results

- Evidence of integration with ERA policies and events
- Description of synergies between market standards and DBE standards
-

## **Task B19 & B36 - Connection to standards bodies and to emerging market standards (IBM)**

### **Task B19 & B36 Objectives**

Our objective is to ensure that both DBE and European interests are properly addressed and gaps and overlaps that could affect DBE are identified and covered - for example by standards extensions or DBE standards acknowledged.

### **Task B19 & B36 Methodology**

Our approach is to link into those standards bodies (W3C, OMG etc.) that are currently debating issues relevant to successful DBE implementation. Already, the project has engaged in OMG and several project partners have become active members. It is noted that there is a proliferation of standards relating to the scope of DBE. Recently IBM identified over 100 standards that are relevant for its on-demand business strategy. Clearly pursuing as many as this is a task that the DBE project cannot undertake.

A table of standards will be drawn up (100 plus that could be relevant) and then the leading 5-10 will be identified for action. The most important standards areas are:

- (1) Data formats for transactions (e.g. orders, invoices, confirmations, delivery notes, payments etc.) Various standards and meta-standards are currently used, and many of them will be industry/sector specific. We need to get a handle on these to advise our driver SMEs who may not be familiar with this territory.
- (2) Standards within web services that relate to procedure call names, parameters passed etc. For example a PIM definition of the calls needed to action transactions. The data inside the parameters of a procedure call will conform to a format standard designated in (1) above.

**Task B19 & B36 Action plan**

<b>Objective</b>	<b>Activities</b>		<b>Actions</b>
Information gathering	1	Internal analysis	<ul style="list-style-type: none"> <li>• Analysis of the existing standards used by the DBE partners</li> <li>• Identification of best practices standard used among DBE partners</li> </ul>
	2	Analysis of the general actual market situation	<ul style="list-style-type: none"> <li>• Coordinate DBE consortium membership of standards bodies</li> <li>• Draw on experience of IBM</li> </ul>
Analysis	3	Identify key issues	<ul style="list-style-type: none"> <li>• Define good/bad points for the standards used by DBE partners</li> <li>• Suggest new ways of interoperability among DBE and general existing standards</li> </ul>
Policy action	4	Policy level agreement	<ul style="list-style-type: none"> <li>• Agree an engagement strategy with the standards bodies</li> </ul>
	5	Participation in standards	<ul style="list-style-type: none"> <li>• Coordinate specific proposals to standards bodies where relevant</li> </ul>

## Task B37 Integration with local policies and directives (T6)

### Task B37 Objectives

- To understand the experience of the three contracted regions and extrapolate from this experience
- To recruit additional regions to the DBE
- To devise a strategy for long-term expansion via regional involvement

### Task B37 Methodology

The DBE needs to establish a user community and it sees this as being achieved by the involvement of regions, rather than by the project centrally recruiting end users. Regions bring people and resources to expand the DBE capabilities from those achievable within the project budget to the unlimited potential of a growing community. Through the three contracted regions and the additional formally-associated regions a model is being developed in which a 'Regional Catalyst' plays the role of a facilitator to sensitise the regional actors and, either directly or through regional intermediaries, to recruit SME developers and users. Task B37 is concerned with identifying the best model for regional involvement and encouraging wider regional involvement in the DBE. It is thus part of the long-term sustainability of DBE. The experiences of the work of the Regional Catalysts in WP31 will automatically be taken into account in this task as the partners are involved in assessing the work of the regions. In particular the planning activities for Task B34 (Showcase) will be strongly linked to this task.



**Task B37 Action plan**

<b>Objective</b>	<b>Activities</b>		<b>Actions</b>
Understand the experience of the contracted regions	1	Monitoring of first adopter SMEs local environment (Tampere, Aragon and Midland regions plus additional regions)	<ul style="list-style-type: none"> <li>• Visit each region and meet with key players</li> <li>• Produce short ad-hoc papers on key issues in regional adoption</li> </ul>
	2	Benchmarking of these three local SMEs environment, taking into consideration use of local, national or European development funds	<ul style="list-style-type: none"> <li>• Using existing regional data (eg. Innovation Trend Chart) plus regional profiles and SME interviews, develop a set of benchmarks against which potential additional regions can measure themselves.</li> </ul>
	3	Identification of best practices and construction of a common approach which can be used in these three regions	<ul style="list-style-type: none"> <li>• Produce a set of guidelines that can be used by all regions participating in the DBE</li> <li>• Produce the guidelines as a document and presentation</li> </ul>
Recruit additional regions to the DBE	4	Analysis of the European general SME's environment and other opportunities for growing business, including structural funds and other European resources	<ul style="list-style-type: none"> <li>• Conduct a desk survey of funding sources</li> <li>• Conduct a desk survey of regional profiles</li> <li>• Produce a top twenty list of innovative regions</li> <li>• Approach the regions with the DBE opportunity related to their specific situation</li> </ul>
	5	Identification of other European regions where DBE approach can be used, in particular in the new member states	<ul style="list-style-type: none"> <li>• Conduct a desk survey of published information on new Member State regions and other European regions</li> <li>• Produce a top twenty list of innovative regions</li> <li>• Approach the regions with the DBE opportunity related to their specific situation</li> </ul>

	6	Selection of local administration, SME's and research centre interested to DBE operational approach	<ul style="list-style-type: none"> <li>• From published literature and from responses to actions 2 and 5 above, identify high-profile regional organisations that should be selected as Regional Catalysts</li> </ul>
Devise a strategy for long-term expansion via regional involvement	7	Updating DBE approach in connection with contributions and experiences in the new European regions and stakeholders involved in the project	<ul style="list-style-type: none"> <li>• Update the guidelines in action 3 to reflect the totality of the project's experience and to incorporate the social research results and the early experiences of new Member States and non-EU regions including non-European.</li> </ul>
	8	Identification of new DBE enlargement areas and definition of a long term approach in order to consolidate DBE open source methodology	<ul style="list-style-type: none"> <li>• Respond to enquiries from regional actors</li> <li>• Make presentations to interested regions and influential groups</li> <li>• Develop 'marketing' approach</li> </ul>
	9	Foresight and strategy studies in order to export DBE approach in new European regions on the basis of open source method	<ul style="list-style-type: none"> <li>• Analyse market watch actions and media comment on ICT and European regions</li> <li>• Interview key respondents from DBE participants about their view of the future</li> <li>• Develop a vision document on the future of DBE</li> </ul>

## Task B32 - ERA and DBE Growth (CENSIS)

### **Task B32 - Objectives**

The central aim of this task is to connect the growth of DBE with that of ERA., i.e. find possible synergies among the two approaches able to delineate possible measure for DBE sustainability after the project end.

### **Task B32 - Methodology**

In order to achieve this goal it's necessary to map the DBE experience and at the same time observe carefully the ERA development dynamics. This general aim can be divided into 3 more precise objectives able to conduct, ones integrated, to the goal achievement. Here below a series of operational actions to be conduct.

In the time this report is being written it's not possible to determine, or give as definitive, activities and actions related to objectives c and d. The development of collaboration between DBE and the ERA programme and the diffusion of DBE are, in fact, operatively strongly dependent from the first objective. The objectives here presented are going to be addressed in different time frame starting in month 19 and covering the last year of DBE project activities. The necessity to carefully design the actions related to objectives b and c will be tackled after the first research phase and will be described in a specific report.

**Task B32 - Action plan**

<b>Objective</b>	<b>Activities</b>	<b>Actions</b>
a) Understand possible synergies between ERA and DBE	1. Mapping national/local programmes related to IT innovative projects, in particular that ones where DBE partners are involved	<ul style="list-style-type: none"> <li>Periodically collect information on RCs involvement in ICT projects and regional/national projects and policies for ICT.</li> <li>It'll be also required to each RC to provide a report on their involvement in ICT projects and to insert it in the waste contest of regional and national policies. RCs will be in this way an important source of data on national ICT programme and policies.</li> <li>Conduct a desk survey of published information on comparisons of national ICT programmes and on the information collected by RCs (already available source as EIS annual report will be used).</li> </ul>
	2. Monitoring European and international programmes related to ICT innovative projects, stressing possible overlapping among them	<ul style="list-style-type: none"> <li>Conduct a desk research on European programmes in the field of ICT development already available source</li> </ul>
	3. Analysis of the ERA policy and identify possible overlapping with the DBE activity	<ul style="list-style-type: none"> <li>Monitoring ERA and DBE policy documents (desk research)</li> </ul>

**Report:** The output of this activity will be a report divided in two main section; in the first one the findings from above listed actions will be presented and overlapping and possible connection among DBE and ERA and other IP will arose. The second part of the report will be dedicated to a strategic plan for effective connection with ERA. This will constitute an important passage to DBE approach diffusion.

b) Develop collaboration with ERA networks	4. Connection development with other IP project and ERA programme	<ul style="list-style-type: none"> <li>• Provide documents describing DBE approach and point of strength</li> <li>• Diffuse this documents using already existing communication channels as DBE and ERA web pages</li> </ul>
	5. DBE added value: exploitation of DBE multidisciplinary approach benefits for the operational implementation of ERA	<ul style="list-style-type: none"> <li>• Diffuse it thought other online channels like EUcluster and IP portals</li> <li>• Draw up and update a list of seminars, workshops and meeting involving ERA networks and Coordinated Actions involved in projects interesting for DBE and possibly interested in DBE.</li> <li>• Attend or arrange speaker attendance at event organized by and/or involving already established networks of European projects and ERA (Coordinated actions in the field of ICT and other possible networks and networking opportunities)</li> </ul>

c) DBE approach diffusion	6. Identification of other stakeholders interested in DBE operational approach in order to implement ERA, in particular in the new member states	<ul style="list-style-type: none"> <li>Starting from the identification of other European regions interested in DBE conducted in Task B37, spread the above mentioned document on DBE characteristics and project strategic approach.</li> </ul>
<b>Deliverable:</b> Integration with ERA policy and strategy.		