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D2.1: User Journey Methodology definition Initial

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About

The project is co-funded by the European Commission's Horizon 2020 research and innovation framework programme. Spanning through three years, ACROSS consists of a consortium of 10 partners from 7 countries: Athens Technology Center (coordinator), Tecnalia, Dataport, Engineering, Fraunhofer, GRNET, TimeLex, The Lisbon Council, Waag and VARAM. The project kicked off its activities in February 2021, with an energising online meeting, where all partners took the floor to present their plans to make the project a great success.

Disclaimer

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Document Revision History

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		Modification Reason	Modified by
V0.1	31/10/2021	Collection of input and draft writing	Waag
V1	15/12/2021	Completion of first draft	Waag
V1.1	21/12/2021	First internal review	Tecnalia
V1.2	14/01/2022	Second internal review	GRNET
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Executive Summary

This report documents the work done in Task 2.1 'User Journey Methodology definition' during the first 12 months aiming to oversee the development of user journeys in ACROSS. It also establishes a shared approach to participation in ACROSS which places citizens, their needs and their rights (particularly data rights) at the forefront.

To these ends, we produced the following:
- **Inventory of existing services** – In February 2021, ACROSS partners began gathering an inventory of existing "cross-border ready services" for each of the three use-case countries. WP2 partners reviewed this list in April 2021 and organised the resources gathered thus far towards preparing for subsequent interviews with citizen participants. The full inventory of existing services will be published in Deliverable 2.3 "Cross-border service gap analysis - Initial".
- **Workshop Preparatory Materials** – A set of materials (see Section 2.1 and Appendix 1) regarding Task 2.1 and participatory approach was created to prepare partners for the first co-creation Workshop which was held on 1st of June.
- **1st Co-creation Workshop (1st June 2021)** – Waag hosted a workshop aiming to share participatory methods amongst consortium members, to establish a co-creative culture in ACROSS, and prepare pilot partners to conduct interviews with people who have moved across borders (See Section 2.2).
- **Interview Starter Pack** – Waag created an Interview Starter Pack (see Section 2.3 and Appendix 4) to help partners embark on the interview and survey process.
- **Interviews** – Pilot partners conducted interviews with people who have recently moved across borders or who are currently doing so. This was done during summer 2021 to gather information for user journeys.

The outcome of the previous steps was the development of a shared user journey in ACROSS (see Section 4 and Appendix 5). Based on these (draft) user journeys we created a number of 'personas' around which to base the user journeys for cross-border services (see Appendix 6).

Task T2.1 laid the foundation for further work in T2.2 and T2.3. The interviews, inventory of existing services, and user journey form the basis for the gap analysis presented in D2.3 'Report for cross-border service gap analysis - Initial'. The co-creative process initiated in this task is carried forth in T2.3 and presented in D2.5, most specifically through a second co-creative workshop hosted by Waag in Amsterdam in November, 2021 (See Section 5).

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List of Terms and Abbreviations

Abbreviation/Term	Definition
Co-creation	Co-creation is an interdisciplinary process and design methodology that is central to the ACROSS project. It aims to bring together different societal actors around matters of shared concern. As a generative method, co-creation brings relevance, ownership, agency and sustainability to the project.
Cross-border services	Cross-border services are the services that help people move between countries. In the ACROSS project, the cross-border services help EU residents move from one EU country to another EU country for work or study purposes. For example, one can think about services that help with locating job opportunities, finding accommodation or opening bank accounts.
EU	European Union
GDPR	The General Data Protection Regulation (GDPR) is a legal framework that sets guidelines for the collection and processing of personal information from individuals who live in the European Union (EU). Since the Regulation applies regardless of where websites are based, it must be heeded by all sites that attract European visitors, even if they don't specifically market goods or services to EU residents.[1]
Pilot partners	These are the partners of the ACROSS project that provide information, conduct research, and organise co-creation workshops, among other activities, in the pilot countries. The pilot partners are Dataport, GRNET, and VARAM in respectively Germany, Greece, and Latvia.

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[1] https://gdpr.eu/

1. Introduction

1.1. Approach to Task 2.1

ACROSS has the potential to meaningfully involve people in the decisions that are made about them, their data, and their rights when using digital services. As the project progresses, we intend that the scope of co-creation and participation grows in this way. T2.1 is the first step in this direction and provides the foundation for deeper participation in the future.

The process documented in this deliverable specified which information was needed to create qualitative user journeys; and introduced key questions and methods for gathering that information. **Most importantly, this task (T2.1) set the basis for co-creation in ACROSS** by introducing pilot partners to participatory practices which in turn root the user journeys (around which further development is based) in the real experiences of real people.

To this end, Task T2.1
- Initiates involvement with people who move across EU borders in the process of co-creating relevant user journeys that are based on real-life experiences.
- Establishes a foundation for co-creation in ACROSS that prioritises citizen and other stakeholder involvement *beyond* user journeys. This co-creative foundation will also be applied to the development of gap analysis (T2.2), the co-design of the ACROSS government framework (T2.3), and perhaps in other areas of the project as well.

Co-creation occurs first within the consortium (to develop a coherent strategy), then with people who have or had experience in moving across European borders either for working or studying. In the future, co-creation will also occur with other relevant stakeholders such as third-party service providers, universities, and public administrators. The Task requires particular coordination with WP6 (pilots), as well as coordination with WP3, WP4 (user support tools), WP5 (architecture and platform), and WP7 (communication and dissemination) (see further dependencies in Chapter 5).

1.2. Methodology and Structure of the Deliverable

This deliverable documents on our initial participatory steps in ACROSS. Within T2.1, this process included the following activities:

- Developing an **Inventory of existing** (cross-border) **services**
- Writing a **Workshop Preparatory Materials** which introduced participatory concepts and approaches in ACROSS
- Hosting a workshop on **June 1st** to share relevant resources and co-creative strategies

- Compiling an **Interview Starter Pack** that prepared pilot partners to bring citizens into a participatory process during summer 2021
- Aiding pilot partners in conducting **interviews and/or surveys**
- Developing **Shared User Journey Scenarios** based on findings from all pilot areas
- **Preparing for T2.2 and T2.3** to ensure continuity of the progress in T2.1

Chapter 2 describes the preparation (Section 2.1), execution (Section 2.2), and follow-up (Section 2.3) to the workshop held on June 1, 2021. The workshop included an introduction to co-creative strategies and methods; a discussion in which pilot partners considered and documented aspects of their own experiences moving across borders; a collaborative session that identified shared requirements for developing user journeys; and a presentation (accompanied by resources) for ensuring ethical, legal and GDPR compliance during the participatory process.

Chapter 3 delves into the interview methodology and the initial community engagement that have taken place in the first 12 months of the ACROSS project. Three ACROSS partners are tasked with the use case research in their respective countries: VARAM in Latvia, Dataport in Germany, and GRNET in Greece. Each of these partners interviewed between 10-14 citizens who are potential end-users of the prospective ACROSS platform. These interviews formed the basis for the user journey scenarios. To build these scenarios, the three pilot partners collected their interview results in a commonly agreed template that was organised into the journey that a user must go through in order to move abroad. Each pilot partner produced two of these templates: one for the user journey for a student and one for a worker, as the selected scenarios were 1) a student planning to study abroad and 2) a worker willing to work abroad. On September 3rd 2021, the partners collaboratively went through the three templates for each user journey and created a common user journey that can be generalized for the average journey of the users. The results of this session can be found in Appendix 6 'User Journey Scenarios'.

As a final step in the user journey methodology, the pilot partners were asked to reflect on their methodology and community engagement. Section 3.3 describes what went well and what could have been improved in the methodology, as presented by the three pilot partners.

Chapter 4 then briefly introduces the results of the user journey methodology and outlines which services the interviewees used and where they encountered pain points with those services. The comprehensive and complete user journeys scenarios can be found in Appendix 6. More information can also be found in deliverable D6.1, sections 3.1.1 and 3.1.2.

Finally, chapter 5 outlines the next steps that the ACROSS partners will undertake regarding the user journey research. Moreover, this chapter also documents the connections and interdependencies between this deliverable and other deliverables in the ACROSS project.

2. First Co-Creation Workshop

The first co-creation Workshop on June 1st was an opportunity for pilot partners to come together in an interactive setting. The workshop was held online due to health and travel restrictions, and was attended by representatives from all consortium partners. The workshop generally consisted of three parts: the Workshop Preparatory Materials, the workshop itself, and the Interview Starter Pack which followed up on the workshop.

2.1. Workshop Preparatory Materials

The Workshop Preparatory Materials were the first introduction to participation and co-creation in ACROSS. As such, the preparatory materials began by introducing relevant concepts and resources, like the Arnstein's ladder of participation (Arnstein, 1969)[2] and the co-creation navigator[3]. The document then discusses participation in ACROSS and considers potential routes for co-creation in the project. The preparatory materials also included tentative plans for participation in each of the pilots (one plan per pilot partner), to be iterated further during the workshop. The Workshop Preparatory Materials conclude with next steps and an agenda to be addressed during the workshop.

The Workshop Preparatory Materials can be found in Appendix 1.

2.2. Documentation of Workshop

2.2.1.   Introduction to Co-Creation

The workshop started with an introduction to co-creation led by Meia Wippoo of Waag. This interactive presentation began with a short participatory exercise, and introduced key concepts surrounding processes, mindsets, strategies, tips, and methods for co-creation. The full presentation is available in Appendix 2.

2.2.2.   Considering Our Own User Journeys

This session consisted of a reflective conversation between the participants. Many of the ACROSS team members have been in a situation similar to that of potential users: they have moved across European borders for work and/or study. By sharing our own experiences and listening to each

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[2] Arnstein, S.R. (1969). "A ladder of citizen participation". Journal of the American Institute of Planners. 35 (4): 216–224. doi:10.1080/01944366908977225. hdl:11250/2444598

[3] https://ccn.waag.org/

other's, this session helped us to consider the position of those we aim to help through our project.

One outcome of this conversation was that the start and end of a journey across borders is not always clear. Does a journey begin when a decision is made to move? Or does it begin when the first administrative work is filed? Does a journey end once a person has arrived in a new country? Once they have found an apartment? Once they are a permanent resident? Moreover, the process is not always successful: sometimes it begins but does not end. This points again to the need to base the starts and ends of the ACROSS user journeys as much as possible on the real-life experiences of those potential end-users, who later on participated in the interviews and surveys that we conducted.

The discussion also confirmed that moving across borders is most often a confusing and frustrating process. In this way, it prepared us for certain topics that interviewees and those surveyed may want to address, including the lack of clear guidelines about which steps to take, potential 'catch 22s'[4] (such as requiring a local address to open a local bank account, while also requiring a local bank account to acquire a local address), and concerns regarding the widespread dissemination of personal information that is required to deliver to various public and private parties.

2.2.3. Identifying Shared Requirements for User Journeys

We held an exercise to identify which specific information needed to be obtained via the interview and survey process by all pilot partners. While partners were free to find additional information, this exercise identified the **necessary** and **shared** pieces of information to gather.

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[4] https://en.wikipedia.org/wiki/Catch-22_(logic)

Figure I: The shared digital workspace for identifying shared requirements for User Journeys

Previous discussions with pilot partners and the aforementioned activities during the workshop led us to create the shared digital workspace, as seen above in figure 1. The workspace included pieces of information that we may want to obtain in interviews (seen on the multi-coloured cards) and were organized into categories. All participants had access to the board. People could move the cards (pieces of information) to the 'Not required by all' column or the 'Required by all' column. If one person disagreed with a card being placed in either of those columns, that card was then moved to the 'Island of disagreement' to be discussed. Following a discussion on those 'cards' (pieces of information) in the 'Island of disagreement', each debated card was ultimately able to be placed in either the 'required' or 'not required' column. The exercise left us with a concrete list of information that had to be gathered by all partners through interviews and/or surveys during the summer. This, in turn, allowed us to develop a common framework (presented in the form of the Interview Starter Pack, Section 2.3) for doing so across all pilots.

2.2.4. GDPR, Legal and Ethical Compliance

Hans Graux from TimeLex gave a presentation with practical guidance on how to behave in ACROSS which focused on legal requirements and ethical expectations. The presentation was also accompanied by relevant templates for use by partners. The presentation was followed by a discussion on the types of challenges that partners could face in a participatory process. The full slides of this presentation are included in Appendix 3.

2.3. Interview Starter Pack

The Interview Starter Pack provided concrete resources to follow up from the workshop and help pilot partners to conduct their interviews with citizens who have experience moving across borders. It begins with a list of minimum requirements for holding interviews and provides methods for doing so. The starter pack also introduces a common format for introducing the project and for requesting consent. Resources and steps are presented for collecting required data points, quantitative data and qualitative data. The Interview Starter Pack is included in Appendix 4.

3. Interviews and Initial Community Engagement

In this section, we briefly introduce and reflect on the interviews and initial community engagement that have taken place in the first 12 months of the ACROSS project. For more detailed information regarding the use case scenarios and the methods for the interviews, please refer to D6.1 ("Use case scenarios and roadmap"). The D6.1 document contains detailed descriptions of all three use cases, including their execution scenarios, involved stakeholders, planned activities on engaging the private sector and end-users of the ACROSS platform in the co-design of the services, as well as a detailed roadmap for use case execution.

3.1. The user journey interviews

Within the ACROSS project, three partners are tasked with the use case research in their respective countries: Dataport in Germany, GRNET in Greece, and VARAM in Latvia. Each of these partners interviewed between 10-14 citizens who are potential end-users of the prospective ACROSS platform. They were chosen because of their experience with moving abroad within the EU for work or study purposes.

Before the interviews were conducted, the pilot partners agreed to write protocols for each interview and to collect data privacy agreements. All pilot partners compiled the interview results into a template as provided by Dataport. Collecting the data this way eased the comparison and compilation of the interview results from the different pilot countries. Dataport did not record nor transcribe the interviews. Rather, they immediately entered their results into the agreed-upon template. However, GRNET did record and temporarily save the interviews, to ease the completion of the templates and to ensure the accuracy, consistency and completeness of the feedback given by the interviewees. Moreover, VARAM outsourced their interviews and received the transcriptions of the interviews in the original language (either Latvian or English). However, as this was merely for internal use, VARAM also presented their results in the form of the said template.

The Dataport ACROSS team conducted 13 interviews, of which ten interviewees moved abroad for studying and the other three moved abroad for work. All of the interviewees moved from Germany to another country in the EU; this is to say that they did not interview any end-users whose destination country was Germany. User research experts from within Dataport consulted the Dataport ACROSS team with the preparation and execution of the interviews. During the processing of the interview results, the previously agreed-upon template deemed inappropriate different situations and approaches. Consequently, the Dataport ACROSS team slightly adjusted their template.

The VARAM ACROSS team chose to approach the interviews slightly differently. As they did not have internal experts on user research, they outsourced the conduction of the interviews. The interviews were all in-depth and lasted for more than an hour. In total, they interviewed ten people; half of them moved for study and the other half moved for work purposes. In this pilot, for five of the interviewees Latvia was their source country, for the other five Latvia was their destination country.

The GRNET ACROSS team conducted 12 interviews; of which five interviewees moved for studying, five moved for working and two actually moved for both for studies and for work. Two of the interviewees moved to Greece for studies/work, while the rest moved from Greece to another EU country in the last five years, which means that their experiences are relatively recent.

The GRNET interviews were recorded and temporarily saved, with the consent from the interviewees, as a backup for ensuring the accuracy of the notes and that all the necessary information would be included. The results were inputted in the predetermined interview template, however, it needed slight adjustment due to the different personal situations and approaches. However, this did mean that three of the interviews lack feedback regarding data privacy, as the final interview template was completed after GRNET had started with the interviews.

3.2. Internal co-creation session to create one common user scenario

The three pilot partners collected their interview results in a template that was organized into the journey that a user must go through in order to move abroad (see figure 2 for the empty template and a larger version in Appendix 5). Per moment in the journey, the information was split into three classes: the action that the user must go through, the important aspects in that action (think of: which stakeholders must they deal with? And which platforms can they use?), and the pain points that the users might experience during that action. Each pilot partner produced two of these templates: one for the user journey for a student and one for a worker.
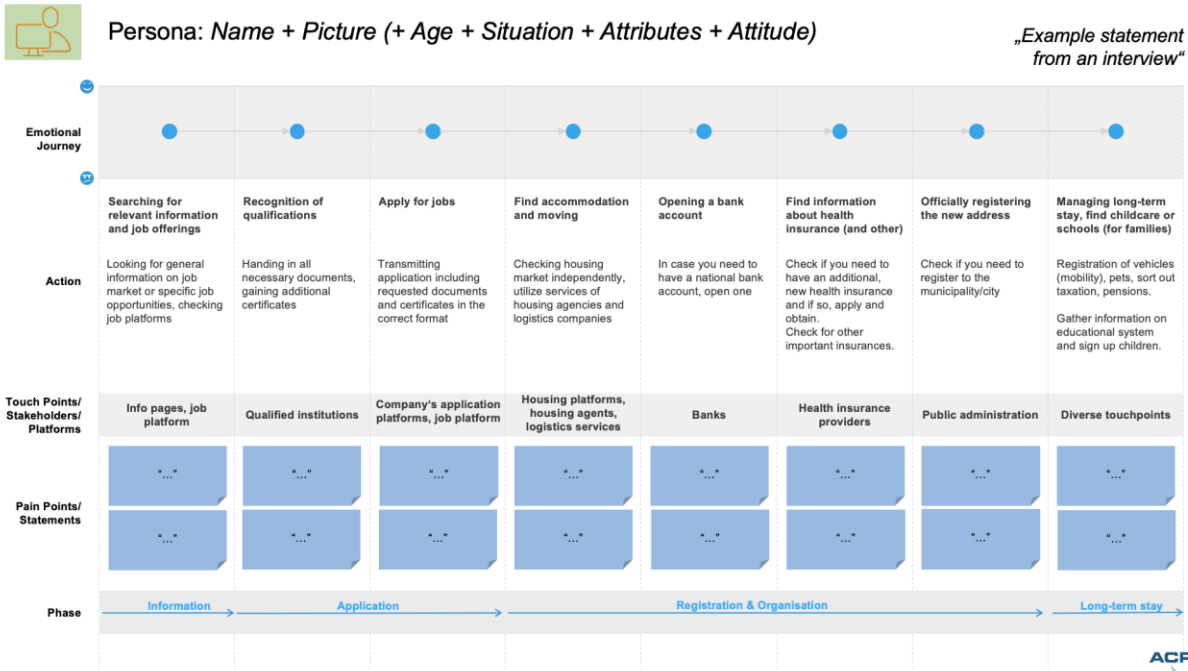
Figure II: Template for the user journey for working abroad

On September 3rd 2021, the partners in WP2 came together to collect and compare the interview results. As the results were all collected in the templates, it was easy to see which aspects and pain points were mentioned in more than one country and which needed to be added to the list. During an online meeting, the partners collaboratively went through the three templates for each user journey and created a common user journey that can be generalized for the average journey of the users. The results of this session can be found in Appendix 6 'User Journey Scenarios'.

However, it is important to mention here that this average journey is not representative of the journeys of all possible users. As mentioned above, the pilot partners interviewed between 10-14 people who have moved within the EU for either work or study purposes. The group was relatively homogenous: there was not a lot of variation in the socio-economic, cultural, ethnic, and educational backgrounds within the group of interviewees. However, the experiences of a highly educated person from a well-off family are significantly different from the experiences of a refugee who does not have a residency, bank account or even a passport. This is a limitation of the ACROSS project that we must acknowledge and keep in mind. The ACROSS project and proposed platform is merely a prototype with a design bias that might exclude people from marginalized groups. If the platform were to be implemented and used, it would need to be significantly extended in order to facilitate the experiences and thresholds of all the people in the EU who wish to move abroad for work or study purposes.

3.3. Reflection on the user journey methodology

After the completion of the interviews and the collection and compilation of the data, the pilot partners were asked to reflect on their experiences with this methodology. This section describes what went well and what could have been improved in the methodology, as presented by the three pilot partners.

3.3.1. Reflection of the user journey research by Dataport

According to Dataport, there were three main positive aspects of the user journey research: storytelling had an impact, step-by-step thinking helped, and the desires for 2030 triggered a lot of associations. The interviewees were asked to tell their stories of moving abroad through their own eyes. This revealed many pain points that were directly linked to the user journey questions. Moreover, having the potential user journey in mind while interviewing helped the interviewer to predict and better understand the individual steps in the journey and the corresponding challenges. Finally, making the interviewees think of the best possible as well as an imaginable solution in the future (e.g., 2030) let them think freely without biases. This way, their imagination was not limited by feasibility constraints or concerns regarding data security. This resulted in a wide variety of imagined platforms and futures.

However, there were also negative aspects to the user journey research methodology. The first was the fact that they interviewed an extremely homogenous group; all interviewees went from Germany towards another European country and came from similar socioeconomic and educational backgrounds. They experienced difficulty in accessing interviewees from other countries that came to Germany for work or study purposes.

Second, due to the COVID-19 pandemic, all interviews had to be conducted via a video conference tool. This limited the connection and interaction between the interviewer and the interviewee. If the interviews could be conducted in person, the interviewee might have felt more comfortable sharing more information.

Third, the research merely consisted of qualitative tools and personal exchanges. There was a lack of quantitative data, which - in combination with the homogenous group - might give a skewed perspective of the user journey.

Finally, the interviewees all moved abroad in the last five years. On the one hand, this means that the experiences might be outdated, seeing as the systems and procedures might have changed over the last five years. Moreover, it can also mean that the memories are not clear and that the interviewees cannot remember the full scope of their experience.

3.3.2. Reflection on the user journey research by VARAM

VARAM agreed with Dataport that the questions regarding desires and suggestions for 2030 activated their interviewees as the discussion was not limited by feasibility constraints. They could let their imagination run wild which was helpful for designing a platform from scratch. Moreover, VARAM also experienced the limitations in place due to the online interviews. However, VARAM mentioned that remote interviews would be a reality regardless of the COVID-19 pandemic as many of their respondents were not physically in Latvia. Therefore, we have to take into account that a project such as ACROSS inevitably calls for hybrid research methods. Nevertheless, in-person interviews are still the desirable method.

Unlike Dataport, VARAM had a more mixed group of interviewees; five of the interviewees were Latvians who moved to Greece or Germany, and the other five were foreigners who came to Latvia. Moreover, the interviewees had relatively recently moved, which meant that their experiences were quite up-to-date and their memories were fresh.

Regarding the lack of quantitative data, VARAM would have liked to do online polls, based on data collected from qualitative interviews. However, this wish manifested itself after the completion of the user journey research and could thus not be executed.

Moreover, VARAM emphasized that doing user research must be tailored to seasons of economic activity. As the interviews were planned and executed during the summer, it was hard to reach out to respondents as they were absent. This was specifically the case for international students who were not physically present in Riga during the university summer holidays.

Whereas the Dataport ACROSS team conducted the interviews themselves, VARAM chose to outsource their interviews. This experience had both positive and negative consequences. On the one hand, the interviews were executed by qualitative research professionals, and the results were not influenced by the agenda of the ACROSS partners. On the other hand, the VARAM ACROSS team could have asked extra and more in-depth questions if they would have felt that the interviewee might have been able to supply more specific information. Moreover, outsourcing the interviews made it more difficult to control the process of recruitment and deadlines.

3.3.3. Reflection on the user journey research by GRNET

GRNET agreed with Dataport that the storytelling method had an impact. Letting the interviewees tell their story of moving abroad through their own eyes revealed many positive and negative points that were directly linked to the interview questions. Moreover, the introduction to the purpose of the interview and its structure, as well as the provision of

clarifications on what kind of feedback we are looking for, helped the interviewees to gain a better understanding of the process and to provide as much detailed information as possible.

However, some interviews suffered from poor internet connectivity which created minor communication gaps. Additionally, the Gov.gr portal[5] was launched relatively recently (in March 2019) with the COVID-19 pandemic having accelerated its development, which offered Greek citizens a wide spectrum of digitized services for the first time. This rendered some of the interview feedback obsolete.

Similar to the case of the interviews carried out by Dataport, the group of people who were interviewed by GRNET was rather homogeneous in terms of their educational level, however, there was age diversity and two of the interviews provided feedback regarding the moving experience with Greece being the destination country.

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[5] https://www.gov.gr/

4. Initial User Journeys

This chapter briefly outlines the initial user journeys that were found through the methodology outlined above. The comprehensive and complete user journeys scenarios can be found in Appendix 6. More information can also be found in deliverable D6.1, sections 3.1.1 and 3.1.2. While the interviewees were also asked to outline their desires and suggestions for the ACROSS platform in 2030, that will only be discussed in Deliverable 2.3 ("Report for cross-border service gap analysis - Initial") as a part of the gap analysis. This chapter will merely outline which services the interviewees used and where they encountered pain points with those services.

Before the start of the interview process, the pilot partners created an initial user journey based on personal experiences and literature and internet research. This helped create appropriate interview questions. For example, they categorised a user journey for studying abroad into five phases. The first is the **exploration phase**, this entails that a student needs to find a program, a university, and a country they are interested in. The second phase is the **research into whether they meet the requirements,** how the studies will be financed, how the credits will be transferred. Next, the students need to organise the paperwork and formalities in their home country, as well as apply for the program in the destination country. When it is time to actually move abroad, the students need to enrol at their destination university, find accommodation and organise the formalities and paperwork abroad. Finally, after the program has ended and the student is planning to move back to their country of origin, they need to get their courses accredited and their diploma officially recognized.

This was the original journey that students moving abroad must go through as described by the pilot partners. The partners also worked on an imagined user journey for people who are moving abroad to work. Many of the steps such as accommodation, formalities and necessary paperwork are similar to the student's experiences. However, the people who are working abroad often have other responsibilities such as finding appropriate schools for their children, registering their cars, and getting bank accounts for their income to be deposited into. For more information on the user journey scenario for working abroad, please refer to Appendix 2 and deliverable D6.1, section 3.1.1. The next sections will outline which services are most used during the user journeys for both the working abroad and the studying abroad use cases. These inputs were gathered during the internal co-creation session as described in section 3.2 of this deliverable; the respective results can be found in Appendix 2.

4.1. User Journey - working abroad

This section outlines the cross-border services that most people use when moving abroad for working purposes, and which pain points arise from them. The most used services include:
- Housing services: citizens often search for housing via real estate agencies and websites, job-specific websites (e.g., "au pair-world"), or even social media.
- European health insurance: people often contact their home country insurance provider via telephone or email for information on whether their health insurance is valid abroad.
    - This includes the registration with a general practitioner in their destination country
    - Often, movers take up an additional travel insurance
- Liability insurance
- Registration at local authorities, including the registration of place of residency, deregistration from their home country and updating contact details.
    - Registration for taxes (based on country of residency) and employment (based on type of employment)
    - Tax declaration (public and private)
- Social benefits: people must request a social insurance number service and look into benefits such as pension rights and calculations
- Opening a bank account: this is especially important for new employees, as they must have a local bank account to receive their salary.

The following services were still often mentioned but less crucial for a successful move and stay in a new country:
- Getting a local SIM card (not strictly necessary due to European roaming)
- Acquisition of a public transportation ticket
- Registration of a privately owned car
- Recognition of professional and private certificates (work and academic qualifications, marriage certificate)
- Information on local language course opportunities, local life, the average cost of the rent, average cost of living

Many interviewees experienced difficulties with the aforementioned services, as the services were, for example, not accessible digitally or in different languages. The most mentioned pain points include:
- Searching for housing while still being abroad is a very complicated and time-consuming process, as on-site visits are often demanded and many flat offers or landlords proved to be unreliable.
- There were too many bureaucratic obstacles, where again many in-person visits at local authorities were needed.

- A lot of people experienced language barriers in communicating with local authorities or concerning required (legal) documents.
- The terms and conditions of the services and the access to services were unclear.
- There were unexpected and unclear expenses related to public services.

4.2. User journey - studying abroad

This section outlines the cross-border services that most people use when moving abroad for study purposes, and which pain points arise from them. The most used services include:
- Information about studying abroad: where to study, what requirements the students need to meet, which documents to fill out, expected costs of living, experience reports of former students and guidance regarding the initial steps of moving abroad.
  - This includes how to register for residence, health insurance, mobility cards, and bank accounts.
- Getting financial funding for the studies: via mail and paper documents.
- Formal application to the destination university and the recognition of academic and professional diplomas. This is often done via online forms as well as paper documents.
- Housing services: searching for flats via the destination university, real estate websites or social media.

The following services were still often mentioned but less crucial for a successful move and stay in a new country:
- Mobility: the acquisition of public transportation tickets. This service is used by all students, but is often not too complex. This includes bike renting, bike/car sharing, buying a bike, etc.
- Health insurance: the acquisition of European health insurance or additional travel insurance.
- Registration of place of residence.
- Translations of official (legal) documentation.
- Opening a bank account: this is mainly for part-time jobs.
- Obtaining a SIM card: not strictly necessary as European roaming often suffices, but sometimes you need it for public/private digital services).
- Some people needed to postpone their army duties: this depends on the country of origin.

Many interviewees experienced difficulties with the aforementioned services, as the services were, for example, not accessible digitally or in different languages. The most mentioned pain points include:
- Submission of university application documents to the universities in their home country as well as their destination country.

- Many processes were paper-based and required on-site visits at local authorities. The processes for the application to Erasmus for selecting study courses, creating the learning agreement, matching courses, adapting grades, and checking the relevance of the courses in a common language were often complex and not possible to do digitally.
- Language-barrier concerning official registration and application documents.
- Difficulty with accessing the experience reports of former students.
- Regarding the Erasmus learning agreement, it was difficult to get a comprehensive overview of the courses (credits and content, etc.).
- Differences in cost of living (e.g., renting conditions, prices).
- Housing: finding, application, and confirmation of getting a house often works in circles and you need to be there in person.

5. Next Steps and Connections to Other Tasks

Task T2.1 creates a base for co-creation in ACROSS by rooting the user journeys (around which further development is based) in the experiences of the end-users. These co-creation methods and sessions are first held within the consortium in order to develop a coherent strategy. These methods were then facilitated with people who have or had experience in moving across European borders for work or study purposes, and will include other stakeholders in the future. As this Task forms the foundation of the ACROSS co-creation methods, it has overlap with many of the other work packages. This Task requires coordination with WP3 ("ACROSS Data Governance framework", WP4 ("ACROSS Modules Set-Up"), WP5 ("ACROSS Applications & Platform Integration"), WP6 ("Use cases deployment, evaluation & impact assessment"), and WP7 ("Dissemination, communication and exploitation").

On a lower level, this task is in close relation to Task 2.2 ("Cross-border service gap analysis"). Based on the initial inventory of existing cross-border services as created by the WP6 partners, we have collaboratively created two draft user journeys: one for *study abroad* and one for *working abroad*. These user journeys then inform the 'personas', which are based on common use cases of people who might be interested in moving abroad for work or study purposes. To test whether these 'personas' fit with the experiences of the end-users, the pilot partners have conducted interviews with people who have previously worked or studied abroad. We have used the input from these sessions to validate and finalize the gaps in cross-border services in each step of the individual user journeys. This eventually informs the technical aspects and modules of the WP3 "Data Governance Framework", as well as the T2.3 "ACROSS Governance Framework". This iterative process can be visualized as follows:
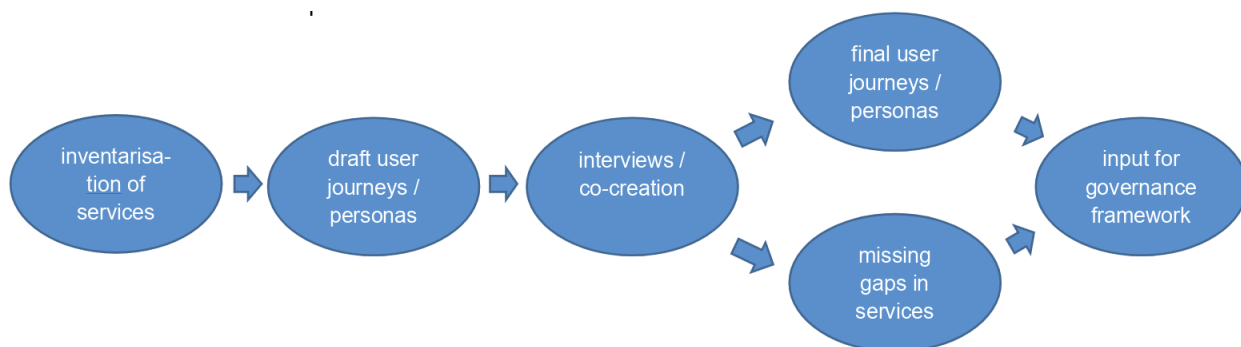
Figure III: The relation of WP2 tasks

The process as visualized in figure 3 has resulted in the current deliverable D2.1 ("User Journey Methodology definition – Initial"), as well as deliverables D2.3 ("Report for cross-border service gap analysis – Initial") and D2.5 ("ACROSS Governance framework including service design approach – Initial"). These three deliverables are all due in month 12, January 2022. In April/May

2022, we will host the first of three co-creation sessions with the prospective end-users in Germany, Greece, and Latvia. The other two will be held at later stages of the project, after a round of analysis and evaluation. The workshop in April/May will primarily help to validate and finalize the gaps we have identified in the cross-border service, as this will inform the direction of the rest of the ACROSS project. This will then result in D2.4 ("Report for cross-border service gap analysis – Final") in month 18, July 2022. However, we will also spend time on the verification of the user journey during the co-creation session in April/May 2022. This will inform the D2.2 ("User Journey Methodology definition – Final"), which is due in month 35, December 2023.

6. References

Arnstein, S. R. (1969). A Ladder of Citizen Participation. *Journal of the American Planning Association*, *35*(4), 216–224. https://doi.org/10.1080/01944366908977225

Appendix 1: Workshop #1 Preparatory Materials

Workshop Preparatory Materials

Subtask 2.1.1

Max Kortlander

waag
technology & society

Page 1 of 12

About this document

This document prepares ACROSS pilot partners for the June 1 workshop by providing brief, relevant background information on participation generally, and proposing approaches to participation in ACROSS both generally and specifically to T2.1. The ideas presented are not intended to be the final form of our participatory methodology. Rather, this document should take a tangible step towards such a methodology, which is to be elaborated further together during the June 1 workshop, and iterated and improved throughout the project

Background resources

Arnstein's ladder of participation

Sherry Arnstein created her ladder of participation in 1969, and it is still a useful tool for making discussions about participation more concrete.

The ladder has 8 rungs, with each step higher representing a deeper form of participation. Facilitators of a participatory process should keep in mind that going higher on the ladder is not always better. Sometimes a project will sit at multiple levels of the ladder some citizens being very highly involved and others being merely informed. It can be good to consider how to make options for various levels of such participation in a project. As is the case with a real ladder, progress often happens moving upward one step at a time.

8	Citizen Control	
7	Delegation	Citizen Control
6	Partnership	
5	Placation	
4	Consultation	Tokenism
3	Informing	
2	Therapy	
1	Manipulation	Nonparticipation

with
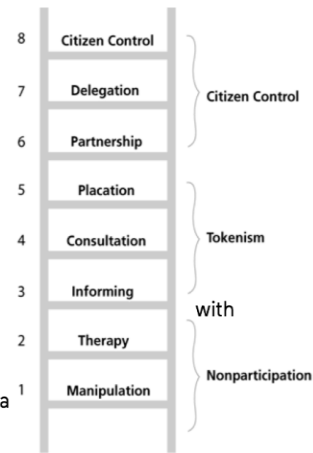
Arnstein's Ladder (1969)
Degrees of Citizen Participation

How high up the ladder would you like to go in ACROSS?

Co-creation navigator

The co-creation navigator is an online guide to co-creation developed in previous Waag

projects (Cities-4-People and MUV).

It uses the metaphor of a metro line, with five 'stations' representing various stages in a co-creative process. Each station includes a short description and includes tools and methods that can be applied in that particular stage.

In addition to providing tools and methods, the co-creation navigator also provides a general methodology for co-creation through its five stages, which are open to being applied and tailored in other projects, including ACROSS.

Page 2 of 12
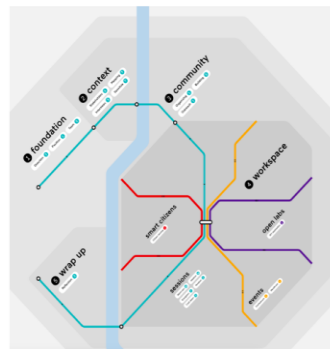
In addition to providing tools and methods, the co-creation navigator also provides a general methodology for co-creation through its five stages, which are open to being applied and tailored in other projects, including ACROSS. Under this lens, co-creation generally involves:

- **foundation** - building a balanced team, with clear tasks and values and a shared understanding of goals

- **context** - challenging assumptions and opening up through immersion into the world of the subject and its stakeholders

- **community** - strategically involving the various stakeholders who represent a variety of experts on the topic

- **workspace** - co-creatively exploring, iterating, and improving concepts with stakeholders

- **wrap up** - evaluating the process and looking ahead

Participation in ACROSS

ACROSS is not a fully co-creative project, in that there are clearly defined outputs and expectations (for example, in the form of project deliverables). It is the project team's responsibility (and opportunity!) to make room for participation where possible, and within the limits allowed by existing obligations, time, resources, and Covid-19.

Why make ACROSS participatory? ACROSS has the potential to meaningfully involve people in the decisions that are made about them, their data, their movement, and their rights. As the project progresses, we hope that the scope of co-creation and participation grow as well so that our project contributes to a more open, ethical, and relevant Single Digital Gateway in Europe. T2.1 is a first step in this direction and a foundation for deeper participation in the future.

Specifically regarding Task 2.1 (User Journey Methodology), ACROSS can apply lessons from the *context* and *community* stages of co-creation. Defining user journeys is about understanding the contexts in which people move across borders, and thus the context of our future work. To help facilitate this, we present a preliminary set of **necessary input to gather** (to be finalized during the workshop) and a set of **example scenarios** for how these needs can be addressed through different participatory routes.

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Necessary input to gather in Task 2.1

In recent weeks, pilot partners submitted answers to the following questions:

- Who would you like to participate or co-create with to develop user journeys?

- How would you like to find them?

- What questions would you like to ask them?

- What method would you like to use to gather their input (e.g. survey, phone interview, co-creation session)?

The full responses to these questions can be found in full in Appendices 1, 2, and 3. The following bullets provide an overview of these answers:

The full responses to these questions can be found in full in Appendices 1, 2, and 3. The following bullets provide an overview of these answers:

Information to gather:

- Basic demographic info
- age
- gender
- nationality

Scenario specifications

- Which country moving to and from
- When the move occurs
- and how long does the moving process last?
- when does it start and when does it end?
- Why the move occurred (e.g. university, work, etc.)
- Whether the move occurred alone or with family, colleagues, etc

General info and open questions

- What steps have you taken to study/work abroad? (Open question)
- Were you assisted in your move (e.g. by an employer or university?)
- What materials did you need to provide as part of your move?
- What was your experience in your own user journey?

- What difficulties did you face during the journey?
- What would have improved your user journey?
- What are the expectations of the government services in another country when moving abroad?

Experiences with cross-border services

- travel
- residence
- Consumer rights (energy, telecoms, banking)
- vehicles
- education
- work
- taxes
- healthcare
- social security/benefits
- visas for family
- elections
- other

Who to participate with

- The 'end user'
- People who move from other use case countries to own use case country (e.g. from Latvia or Germany to Greece).
- People who are currently moving, or who have done so in the past 2 years
- ^ preference for these groups, but not exclusion - depends on availability etc.

- **Sponsoring institutions**
- Employer
- University
- international student groups, etc
- **Public authorities**
- Regulatory authorities
- Related authorities that assist and handle immigration (e.g. immigration department)
- **Service providers**
- Banks
- Housing companies
- Governmental agencies who provide services
- Any provider of cross-border services

How to find and contact participants

- **Find through**
- Universities
- International businesses
- State actors (e.g. embassies, immigration department)
- Social media groups (e.g. for students abroad)
- Personal networks
- Through other interviewees
- **Participatory methods**
- Surveys (utilising market research tools)
- Interviews
- One-on-one conversation
- Co-creation sessions (held digitally)

The bullet points on the previous page provide a comprehensive view of the type of content partners wish to gather. It is presented in full - partners are not expected to address each piece of information and participant listed above. Rather, we will consider this list together and collectively identify the 'common denominators' - those things that all partners must align. From there, partners are able to expand and tailor their own approach based on their own context and needs.

Preparation and checklists can of course keep things on track and ensure that the necessary bases are covered, but it is also recommended to include space for open questions: often the most vivid way to understand some else's experience is through open conversation. Participation strategies towards user journeys should strike a balance in this regard.

Keep in mind that the focus of this task is on understanding the journey. Where does cross-border movement start? Does it ever end? And if so, when? What are the steps in between? Surveys, interviews, and co-creation sessions may expand upon this (for example, by providing insight into the gap analysis), but the goal of this task is to understand the key points in people's journeys, and illuminate the nuances of such journeys.

Example scenarios of participatory routes

The scenarios below aim to shed light on options for participatory approaches in T2.1 and to provide the consortium with a more concrete basis for conversation about our approaches. These scenarios intend to communicate that there is a range of possibilities, and to highlight the types of tradeoffs that you may encounter when deciding to take a certain route. The middle three routes are more in line with our ambitions; the lowest level route illustrates too little participation, the highest level route too much participation.

The actual routes that partners take will likely be different than the scenarios below. Keep in mind that partners' routes do not have to be the same, so long as certain necessary input (see previous section) is gathered.

Lowest Level (manipulation, therapy) This scenario is not ambitious enough for Task 2.1. In this scenario, ACROSS partners create a user journey based on their own assumptions and experiences. This user journey is shared with five students and employees who recently moved, who provide their opinions on the draft user journey in an online survey developed by pilot partners. Partners consult the survey and make minor changes to the user journey.

Lower Level (informing, consultation) - In this scenario, pilot partners submit a questionnaire to a minimum of 10 people who have recently moved across European borders, or who have facilitated someone in doing so (e.g. as an educational institution or an employer). More or less half of the group of respondents consists of study-related moves, and half of work-related moves. The questions are a mix of multiple choice, ranking, and written answers. After receiving feedback from the first five respondents, partners update the questions they ask in order to gradually become more specific. The answers they received form the basis of the user journey scenarios and personas developed by partners.

Page 5 of 12

Pros lower level:

- Conversation allows for more nuanced questions and answers

- Interviews can be done without meeting in person, in cases where physical distancing is needed

- Low-threshold / simple to produce and execute

Cons lower level:

- Allows for dialogue, but not co-design

- Questions driven by assumptions (to an extent)
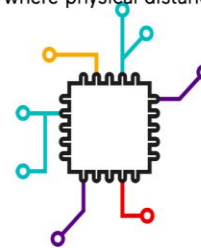
Mid level (consultation) Pilot partners hold 30-minute one-on-one interviews with six citizens who recently moved across borders. Attention is paid explicitly to striving for a high level of representation diversity amongst interviewees (in addition to including both study- and work-related moves). Through these initial interviews, partners identify additional stakeholders - other citizens, as well as business owners and university employees - who are interviewed with a new set of questions based off of lessons learned from the initial interviews. Partners develop their user journeys and personas based on these conversations.

pros mid level:

- Conversation allows for more nuanced questions and answers

- Interviews can be done without meeting in person, in cases where physical distancing is needed

- Low-threshold / simple to produce and execute

cons mid level:

- Allows for dialogue, but not co-design

- Questions driven by assumptions (to an extent)

Page 6 of 12

Higher level (consultation towards collaboration and partnership) - Pilot partners hold the interviews from the previous (mid-level) scenario. They create a draft user journey aligned with other consortium partners based upon these interviews. This draft is then brought to a series of co-creation sessions with stakeholders (including a mix of study-related movers, work-related movers, educational institutions and employers). The first two co-creation sessions define the definite user journey scenario and create personas. Based on these co-created user journeys and personas, a third co-creation session identifies gaps towards building the service gap analysis in Task 2.2.

Pros higher level:

- Collaboration allows for nuance and personal knowledge to emerge

- Conducive to building a community for further collaboration

- Leaves room for assumptions to be challenged, and more directly bases user journeys off of real life experiences

Cons higher level:

- High-threshold / intensive to produce and execute

- Collaboration best suited to a real life setting (although also possible in online settings)

- More difficult to align outcomes among pilots

Highest level (partnership, delegated power). This scenario is unrealistic for pilot partners to achieve given limitations. Following the co-creation sessions in the previous (higher-level) example, pilot partners hold further sessions to transfer ownership of project tasks to citizens. Partners reconsider project deliverables and deadlines based on user-input. The gap analysis and governance model (in T2.2 and T2.3) are developed entirely during collaborative sessions with stakeholders.

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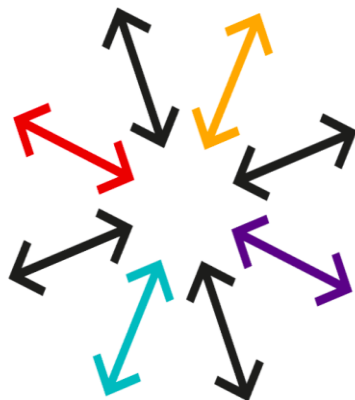
Next steps

Next steps will most immediately occur during the June 1 workshop. Here, partners will:

- Undertake a co-creative exercise to both explore possible facilitation methods and explore our own cross-border experiences

- Agree on the necessary input to gather in T2.1 so that partners can plan their participation routes, questions, and sessions accordingly .

- Receive clarification for GDPR compliance for participation.

- Identify areas in the project where further participation can occur (in other ACROSS tasks and work packages)

Immediately following the workshop, partners will develop and execute their plans (host the actual interviews, co-creation sessions, etc) towards co-developing user journeys by the end of summer 2021. Partners will meet again at the end of summer (late August or early September) to confirm alignment of personas/user journeys based on this input and consider any next steps for participation.

AGENDA
08:45 - 09.00 - Walk in, coffee and hellos
09:00 - 09:25 - Intro to co-creation by **Meia Wippoo, Waag**
09:25 - 10:05 - Our own cross-border experiences by **Timo Behrmann, Dataport**
10:05 - 10:10 - **Break**
10:10 - 10:40 - Agreeing upon information to gather through participation in T2.1 by **Max Kortlander, Waag**
10:40 - 11:25 - GDPR compliance by **Hans Graux, Timelex**
11:25 - 11:30 - **Break**
11:30 - 12:00 - Open questions, next steps, and expanding participation in ACROSS by **Max Kortlander, Waag**

URL/link to Zoom in the invitation

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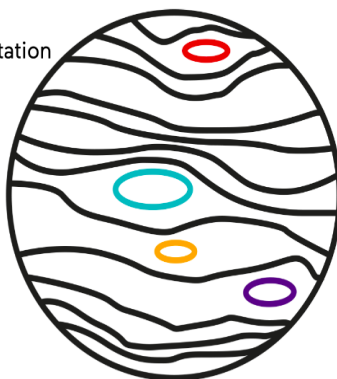
Appendix 1 – Greece tentative plan

ACROSS Use Cases
Proposal for Greek Questionnaire

- Age?
- Sex?
- Contact Info (optional) email:......................... phone:..........................
- Which EU country are you from (citizenship)?
- Which EU country did you move to?
- When did you move to this country?
- How long did you stay?
- For which reason?

Work b. Study c. Retire d. Other:......

- Did any relatives of yours also move with you?

- If yes, which relatives? (spouse, children, parents, siblings, other:...)

- Note on the table the cross-border services that you needed, answering also the following questions:

  - In which category belongs each service?
  - Were they digitized or you had to follow the procedures in person?
  - Did you get any help from your employer/university/embassy/other...?
  - How hard was it for you to complete the procedures?
  - Were there a need to translate documents?

Service	Service Category	Digitized (Y/N)	Help:	How hard was it to complete the procedures?	Did you have to translate any documents?	Which documents were asked from you for your transactions?
	Travel / Residence / Consumer rights (Energy, Telecoms, Banking etc) / Vehicles / Education / Work / Taxes / Health / Social Security - Benefits / Visas for relatives / Elections abroad / Other...		No / Employer / University / Embassy / Other...	(scale 1:very easy to 5: very hard)	(Y/N)	ID / Passport / Certificate of Marital Status / Driving License / Job contract / University certificate / Other...

- Who would you like to participate or co-create with the develop user journeys?

People with German and Latvian citizenship mainly (others could also participate), who moved to Greece as workers, students or retired, alone or with their families, during the last 10 years and stayed at least 6 months.

- How would you like to find them?

Email to universities, foreign corporations, embassies, social media relevant groups to share the questionnaire with whoever might be interested.

- What questions would you like to ask them?

See questionnaire above. It also needs a description of the goals of the project and that we might contact them for more information on the subject if they give us their email or phone.

- What method would you like to use to gather their input (e.g. survey, phone interview, co-creation session)?

Survey and then Interview with some to elaborate on interesting cases

Appendix 2 – Germany tentative plan

1. Who would you like to participate or co-create with the develop user journeys?
    a. Two levels:
    I. First of all, friends and acquaintances from our personal network ("easy to reach out to") that aim at studying/working abroad or have studied/worked abroad recently (within the last two years
    II. Then students and employees that are either willing to study/work abroad from universities or employers in Hamburg or experienced this in their past already (within the last two years too)
2. How would you like to find them?
    a. Again two levels:
    I. Reaching out personally (WhatsApp, Phone, Facebook, Instagram etc.) by using a short, standardized contact template
    II. Reaching out preferably via mail & phone & LinkedIn (target area: Hamburg) in order to encourage people to participate (by using a short, standardised contact template)
3. What questions would you like to ask them?
    a. What steps are you taking/have you taken to study/work abroad?
    b. What services are you using/have you used? (private/public)
    I. What was positive?
    II. What could be improved?
    c. Which institution do you contact/have you contacted to organise studying/working abroad?
    d. What do you need/did you need to study/work abroad?
4. What method would you like to use to gather their input (e.g. survey, phone interview, co-creation session)?
    a. Mostly phone/video interviews,
    I. But probably also small co-creation sessions, organized by us and executed digitally (by using e.g. Padlet or MURAL - digital workspace for visual collaboration
    II. And, maybe also surveys (depends on quantitative or qualitative tendency of questions; e.g. by using market research tools such as Appinio - Market research within minutes)

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Appendix 3: Latvia tentative plan

1) Who would you like to participate or co-create with the develop user journeys?

To create user journeys, we will need collaboration with:
* the end user: other EU country citizens who has already went through LV services with the purpose of studying, working or living in Latvia.
* service provider:
        - different institutions (higher education institutions, non-governmental organisations or student associations e.t.c.)
        - employers (an employer who offers a job to other EU citizens)
* Public administration representatives (those who define regulations and determine regulatory enactments, service owners)

2) How would you like to find them?

If we use our existing resources, we will look for the necessary persons and institutions by addressing people we know, as well as by reviewing the services offered by the state and addressing the persons related to the provision of these services. We would also look for them through universities.

If that would be acceptable in terms of project - we would like to use recruitment or research institution services to select those whom we need to interview.
In order to achieve a more objective result, the technical recruitment part should be organised with the involvement of professionals in order to avoid limited responses and scenarios from acquaintances in our private circle.

3) What questions would you like to ask them?

The questions should be the ones that will help us to define user journeys.
The purpose of the questions would be:
* to understand the experience of these people or the actual user journey;
* to find out what difficulties and support have they faced during the user journey;
* to find out what improvements would be needed to improve user journey.

4) What method would you like to use to gather their input (e.g. survey, phone interview, co-creation session)?
VARAM would prefer quality methods - interviews and discussions.

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Appendix 2: Introduction to co-creation (presentation)

waag
technology & society

Co-creation and participation

Meia Wippoo
lead co-creation lab

What is co-creation?

Co-creation starts from the idea that **everyone is an expert** on one issue or another, first and foremost on their own life. Different levels of expertise are equally valuable in co-creation.

Co-creation focuses on bringing together different societal actors around matters of **shared concern**.

Its **interdisciplinary process** emphasizes the complex web of relations surrounding any issue, ensuring fuller understanding of challenges.

As a generative method, co-creation allows for more **latent knowledge** to emerge, and brings relevance, ownership, agency and sustainability to development.

Co-creation is **not a one off event**, like a referendum in which the community decides what should be done. [...]

Nor is co-creation just a question of formal consultation in which professionals give users a chance to voice their views on a limited number of alternatives.

It is a more **creative** and **interactive** process which challenges the views of all parties and seeks to combine professional and local **expertise** in new ways.

(Cottam, Leadbeater, 2004)

Value of co-creation

Co-creation ensures **relevance,
ownership, agency** and **sustainability**
in a design process.

Warning!

Don't do co-creation if you want to control the outcome

What is co-creation?

Co-creation starts from the idea that **everyone is an expert** on one issue or another, first and foremost on their own life.

Different levels of expertise are equally valuable in co-creation.

What is co-creation?

Co-creation focuses on bringing together different societal actors around matters of **shared concern**.

Its **interdisciplinary process** emphasizes the complex web of relations surrounding any issue, ensuring fuller understanding of challenges.

Social innovation

| academic research | public research | industry research |
matters of fact	matters of concern	matters of interest
Disciplinary heritage	Interdisciplinary	Solutionist approach
Scientific community	Society as research community	Market validation
Scientific questions	Ethical questions	Entrepreneurial questions
Objectivity framing	Cultural framing	Utilitarian framing
Peer review/falsification	Societal impact	Commercial viability

Social innovation
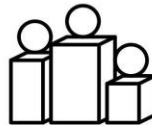
public research
matters of concern

Interdisciplinary
Society as research community
Ethical questions
Cultural framing
Societal impact

Social innovation

imagination
research, invention, mindset

practices
design, context, validation

future

systems
transformation, innovation, sustainability
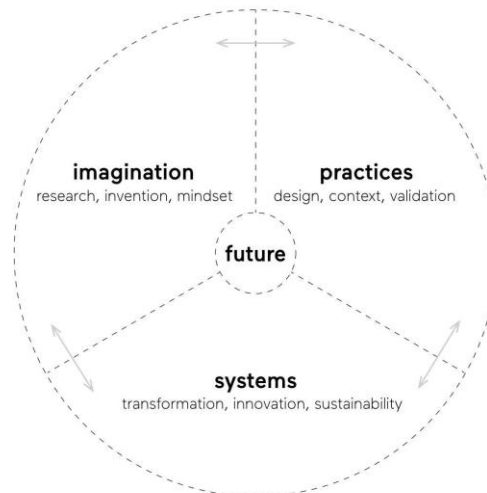
Expectations and participation

- trust
- priority
- availability
- accessibility
- goals
- diversity
- sentiments
- communication
- interests

8	Citizen Control	Citizen Control
7	Delegation	
6	Partnership	
5	Placation	Tokenism
4	Consultation	
3	Informing	
2	Therapy	Nonparticipation
1	Manipulation	
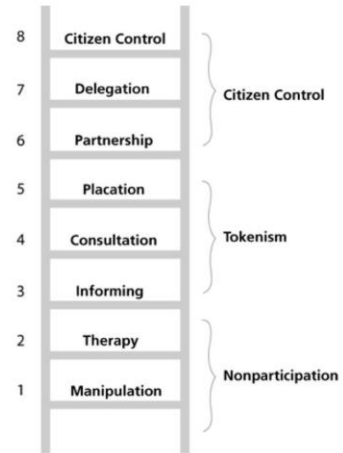
Arnstein's Ladder (1969)
Degrees of Citizen Participation

Design questions
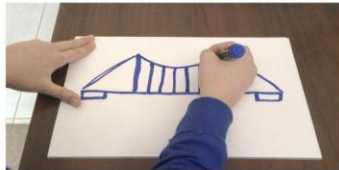
Design a bridge   VS.   How to get to the other side?

Mindsets

Flexible
Hands-on
Experimental
Fearless
Sensitive
Critical
Optimistic
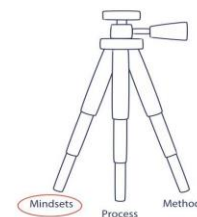
Methods

ccn.waag.org
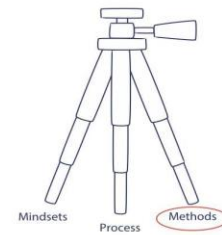
Latent knowledge
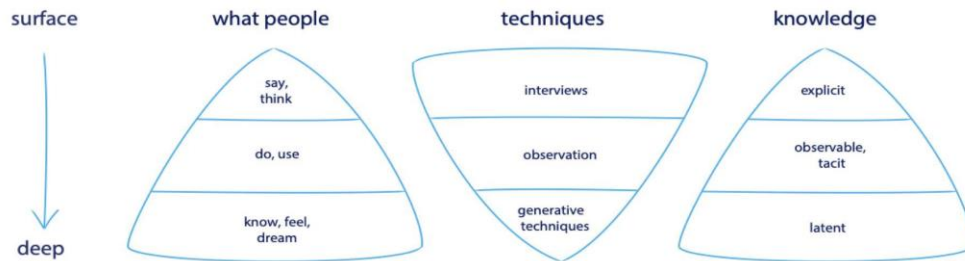
Different levels of knowledge are accessed by different methods (Sleeswijk Visse

What is co-creation?

Co-creation starts from the idea that **everyone is an expert** on one issue or another, first and foremost on their own life. Different levels of expertise are equally valuable in co-creation.

Co-creation focuses on bringing together different societal actors around matters of **shared concern**.

Its **interdisciplinary process** emphasizes the complex web of relations surrounding any issue, ensuring fuller understanding of challenges.
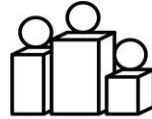
As a generative method, co-creation allows for more **latent knowledge** to emerge, and brings relevance, ownership, agency and sustainability to development.

*It's like cooking not for your guests but with your guests.
This allows you to find out what their tastes are, their skills and preferences, and you can share yours. You make them feel more like protagonists, even if the ingredients, the house, the appliances are made available by you.*

It is different if you prepare everything yourself, imagining what their tastes might be, or how to prepare the table or dishes. That might be more comfortable and maybe faster, but co-creation is more creative, participatory, socializing.

It is not necessarily that everything always works perfectly, but it offers surprises and solutions that you could not have imagined.

Gabriele Rinaldi, Director Bergamo Botanical Garden

Appendix 3: Presentation on Legal and Ethical Guidelines (presented by TimeLex at June 1 Workshop)

WP2
GDPR and ethics guidelines in participatory practices

Presenter: Hans Graux
Organisation: Timelex

ACROSS Workshop
Remote, 1 June 2021

ACROSS

Towards user journeys for the delivery of cross-border services ensuring data sovereignty

Goals of this session

- The EU and EU funded projects have strict **legal** requirements (**GDPR**) and demanding **ethics** expectations (**Responsible Innovation**)
- These can be tricky to manage in **participatory initiatives,** mainly due to the breadth of stakeholders involved, and unpredictability on data use and outcomes

- Goals of this session:
  - Provide some practical guidance – how to behave in ACROSS?
  - Enable discussions on expected challenges and potential surprises

ACROSS

GDPR, data protection and ethics

- **ACROSS is all about enabling users and supporting their sovereignty**
- **Key topics for participatory events:**
  - Who's asking the questions?
  - Who will get the answers?
  - What will we use them for?
  - How do we ensure fairness, including representativeness and impact?

Practical data protection guidelines (i)

- **Every** participatory initiative requires identification of a '**controller**'
  - **One or several** ACROSS partners needs to be identified as **responsible**
  - They receive the answers and provide contact info for questions
  - They are the POC for sharing data with ACROSS partners

- **Every** participatory initiative requires identification of the purposes
  - What will we do with the data? Just fact finding? Comparative analysis? Sharing with other EU initiatives? Creating/modifying applications (even on-the-fly)? Needs analysis? Policy analysis?
  - Don't be too quick to say that it's intuitively obvious!
  - Limit data collection to what you can justify
  - Not trivial to change afterwards – reflect on your plans in advance!

Practical data protection guidelines (ii)

- **Every** participatory initiative requires **clear communication** with the participants
  - Controller and purposes
  - Legal basis – probably consent in most cases (assuming no minors or otherwise legally impaired persons), and if so, informing them that they can withdraw at any time
  - Who will get the data? How is it secured?
  - When will you delete it?
  - Contact info for questions and exercising rights (including access and withdrawing consent)

ACROSS

Practical ethics guidelines (i)

- **Responsible Innovation** means that we design our project with stakeholder interests in mind
  - Clarify what's in it for us
  - Be explicit on what's in it for them, and what the longer-term impacts are expected to be
- Avoid **nudging, manipulation, coercion, and profiling/automated decision making**
  - Don't ask leading questions ("Given that X would harm Y, would you say that...")
  - Don't suggest incentives for specific answers ("By selecting X, you can proceed directly to the service")
  - Don't manipulate by design ("Click to accept - Accept Cancel)
  - Don't verbally nudge ("Did you know that 79% of our users use this function?")

ACROSS

Practical ethics guidelines (ii)

- Check for **representativeness**
  - Doesn't mean that we have a perfect statistical sample of the population all the time
  - But we need to know who's answering, and what that tells us (age – gender – knowledge)
  - Check for bias

- Keep your **eye on the ball**
  - Why were we asking questions? What are we going to do with the answer?
  - Will the **results harm the participants, and/or non-participants?** Did they really understand what would happen?
  - Check for incidental findings and unforeseen consequences. Outcome assessment matters.

ACROSS

Appendix 4: Interview Starter Pack

Interview starter pack

Contents:
1. Minimum requirements
2. Common format
3. Practical tips
4. Consent form

1. Minimum requirements

- Aim of interview process: form potential user journeys, building on initial ideas so far. User journeys can include actions, touch points, emotions, pain points, and phases (for example according to this template proposed by Dataport: ACROSS_WP2_User_Journeys.pptx (sharepoint.com). Eventually to result in concrete (socio-technical) requirements for the ACROSS platform modules.
- Various forms of interaction possible, can stack various 'tools' depending on context (e.g. surveys as first step, that lead to one-on-one interviews, that then provide a common ground for co-creation sessions). Per pilot partner, at least **five one-on-one interviews per 'user profile'** (work-related move vs. study-related move). This minimum of ten conducted interviews will then be distilled into various personas at a later stage (refer to Personas WP2 - WP6 document for elaboration).
- Interviews conducted by at least the three pilot (use case) partners; however, also partners also welcome to conduct surveys or interviews if they have the capacity. The interviewees can be moving from or to **any European country** (not limited to moves between Germany, Greece and Latvia). It is recommended, if possible, to interview people who moved both to and away from your own pilot country.
- Timeline: interviews to be conducted by the end of August so that we can turn findings into requirements for the ACROSS platform during a meeting in the fourth week of August

2. Common format

Introduction: We are working on the European ACROSS project, that aims to make moving within Europe for study or for work easier and more user-centric. The focus is especially on facilitating (digital) cross-border services, or all the services[1] that citizens make use of during their moving process. The aim is eventually to develop an ACROSS platform that will serve as a 'one-stop-shop' for individuals wishing to move abroad, also connecting to existing (public *and* private) services. The pilot countries of Latvia, Greece and Germany are considered a testbed for other European countries.

The project includes both studying and working abroad; while answering these questions, please focus on the situation that best matches your own experience. ***This is the moment to ask for explicit consent** [refer to section 4. consent forms].*

Quantitative information ("data collection")

Basic / demographic data

- What is your nationality?
- How would you rate your digital literacy? How comfortable do you feel finding, evaluating, and communicating through digital media and platforms? *Scale 1-7, 1 = very low/very uncomfortable and 7 = very high/very comfortable*
- What are you (academic) qualifications?

Optional,[2] depending on perceived relevance:

- What is your age? *Alternatively*: Are you a minor?
- Do you have a physical or mental impairment that could complicate your move?

Scenario specifications

- What country are you/did you mov(e)(ing) from?
- What country are you/did you mov(e)(ing) to?
- In what stage of the moving process would you say you are currently? *Scale 1-7, 1 = at the start of the process and 7 = completely finished the process*
- What is your motive for moving? *Work / study*
- Is this your first move within the EU?
- Are you/did you mov(e)(ing) for an indefinite time or for a temporary stay? In case of the latter, how long will your move be for?
- Are you moving alone or with others? In case of the latter, specify with whom.

Qualitative information ("open questions")

Moving process

- What do you need in order to move for studying/working?
- What steps did you take in your moving process? Please be as detailed as possible.
- Are you/Did you arrang(e)(ing) the move independently or are you/were you aided by your employer or educational institution? In case of the latter, in what steps did they aid you?
- (How) Were you assisted in any of these steps by third-party organizations (i.e. not the employer nor educational institution)? *Think of immigration departments, embassies/consulates, commercial platforms that help arrange moves...*
- (How) Were you assisted in any of these steps through informal channels? *Think of gathering information through social media groups, personal networks...*
- What difficulties did you face?

Optional, depending on perceived relevance:

- What materials did you need to provide?
- Would you like to elaborate on how you felt while executing certain steps?
- What would an ideal moving process look like to you?

Relevance of cross-border services

How relevant within your moving process was … [list of 'steps' below]? Did you use a (public/private) service for this step? *scale 1-7, 1= not at all relevant and 7 = very relevant*

1. Residence/housing
2. Registration at local Public Administration
3. Health insurance
4. Healthcare (e.g. registering at local GP)

5. Recognition of academic/work qualifications
- Taxes
- Social security/benefits
- Financial support
- Mobility *(specify: private vehicle / public transport...)*
- Bank account
- Local (mobile) SIM card
- Language skills

Are there any other 'steps' that you encountered and deem relevant?
Which of these 'steps' did you experience particularly positively or negatively?

Per pilot partner: It may be helpful to[3] provide example services for each step.

Gaps and recommendations
- How could your moving process (have been) (be) improved?
- What (kind of) party do you consider responsible for improving the moving process?
- Where did you feel there was a gap in the services provided to you while moving?
- What comes to mind when thinking about the digital aspects of moving abroad within Europe? What opportunities or risks do you see in the governance of digital cross-border services?
- What kind of role do you see for a 'one-stop-shop' ACROSS platform? What should it offer, what would be helpful for you?
- Do you have any other tips or suggestions for the ACROSS platform?

Data privacy issues
One of the ACROSS objectives is to develop a Private/Personal data management web application that allows citizens to:
1. **Control** how their private data are collected, created or used by businesses, governments, or data brokers, giving individuals greater power to determine how their data can be used.
2. **Monitor** which data are available and how they are used or how it has been accessed

Are you interested in knowing and controlling who and how your personal data is used in each of the public and private services that you are using?

Would you mind if public administrations share your personal data with other public administrations, inside your own country or internationally? And could they also share your data with non-profit private services, like schools, universities, etc., or even with commercial companies?

The European legislation on data privacy grants the citizen a series of rights regarding the use of their personal data. What functionalities would be the most important for you, i.e., which of the following rights are the most important to support in a data management application?
1. **The Right to Information**: obtain information about the processing of your personal data
2. **The Right of Access**: Obtain access to personal data concerning you

3. **The Right to Rectification**: request that incorrect, inaccurate or incomplete personal data be corrected
4. **The Right to Erasure**: request that personal data be erased when they are no longer necessary
5. **The Right to Restriction of Processing**: request the limitation of the processing of your personal data in certain cases
6. **The Right to Data Portability**: receive your personal data in a machine readable format and send it to another data controller.
7. **The Right to Object**: oppose the processing of your personal data for marketing purposes or for reasons related to your particular situation
8. **The Right to Avoid Automated Decision-Making**: request that decisions based on automated processing that concern you or significantly affect you and based on your personal data be made by individuals and not only by computers; Likewise, you have the right, in this case, to express your point of view and to challenge the decision.

In addition, should the use of your data only be allowed:

*   With your consent (i.e., when you actively allow your data to be accessed and used, on a case-by-case basis)?
*   When the law requires this (i.e., when there is legislation that allows someone, such as a public administration, to access and use your data)?
*   When this is in the public interest (i.e., when there is a clear benefit to society, such as access and use of your data for scientific research)?

3. Practical tips

Tips for conducting different types of interaction: surveys – individual interviews – focus group interviews – co-creation sessions. This section is only a compilation of suggestions; chosen route depends on the level of participation that is desired. In addition, see the workshop preparatory materials document for a comprehensive overview of levels of participation.

Individual Interviews

Possible information to give to the interviewees prior to the interview:

Welcome to this interview. Thank you for participating in this study. Before we continue, I would like to receive your permission to eventually record the interview. The recording will only be used to transcribe the interview. Now I would like to tell you what our commitments are during and after this interview. I guarantee you the following:

1. Your participation is voluntary and you may stop at any time;
2. The results of this interview will be confidential. The results will not be provided to any other than me and our consortium;
3. If you wish your name and company name will not be mentioned;
4. At the end of this research, you will receive a copy of the final report;
5. If you have any question don't hesitate to ask me during or after this interview.

Tips for conducting individual interviews

1. Converse = Highlight conversations
2. Listen
3. Explore what your interviewee finds important
4. Probe
5. Learn to remain quiet sometimes
6. Persist
7. Play the innocent
8. Not too short, not too long
9. Word questions clearly
10. Sequence your moves, show structure
11. Topical stages
12. Balance
13. Be candid/ brave
14. Sense of integrity/equality
15. Show respect
16. Embody concern, show care for
17. Test your questions
18. Rehearse = know your questions
19. Don't date members of your own family
20. Start off on a strong note = Good introduction
21. End on a positive note
22. Writing notes right after the interview
23. Tape-record
24. Telephone/ video only as a last resort
25. Practice, practice, practice

Focus Groups

Set up a focus group

Step 1. Set your goals. It is important to identify the information you expect at the completion of the focus group.

Step 2. Limit your questions. A common mistake many focus groups make is trying to cram too many questions into a session. A 90-minute focus group with 10-12 participants shouldn't have more than five or six principal questions. Each question needs to be fully discussed, and will likely involve drilling down on particular ideas and comments. Plan on spending about 10 minutes on each topic.

Step 3: Start with **open-ended** questions. Your first set of questions should be designed to gain the big-picture insight. Open-ended questions ask for ideas and opinions, not simple one- or two-word responses. It is easy for a focus group to be steered by the questions, which can cause skewed results and disingenuous opinions.

Step 4: Follow up with **specific** questions. Once your group has voiced their unprompted views, it is acceptable to ask specific questions.

Step 5: Quantify. Focus groups offer opportunities to learn why people hold certain opinions. Your questions should try to capture the opinions of the entire group. It is easy for one or two vocal attendees

to drive the conversation of the session. To avoid this, probe to find out who within the group shares a particular opinion. Asking who prefers red and who prefers blue provides an opportunity for less vocal group members to weigh in on a discussion. Some insight can be gained if the opinions are universal across all participants or if opinions vary considerably.

Basic dimensions of Focus Group Interviews

Moderator	Participants	Environment	Analysis and Reporting
Skillful in group discussions	Carefully recruited	Comfortable	Systematic analysis
Uses pre-determined questions	5 to 10 people per group, 6-8 preferred	Circle seating	Verifiable procedures
Establishes permissive environment	Similar types of people	Water, drinks etc.	Appropriate reporting
	Repeated groups	Tape recording is optional	

Discussion process and moderation

1. Welcome (Introduce moderator and assistant)
2. Overview of topic
3. *Introduction of the project and the related scope of the focus*
4. *group interviews*
4. *Ground rules*
   a. *No right or wrong answers, only differing points of view*
   b. *We're taking notes, one person speaking at a time*
   c. *We're on a first name basis*
   d. *You don't need to agree with others, but you must listen respectfully as others share their views*

e. *Rules for cellular phones and pagers if applicable.*
f. *My role as moderator will be to*
g. *guide the discussion*
5. *Questions (as decided in the beginning of the document)*
6. *Three Step Conclusion*
7. *Summarize with confirmation*
8. *Review purpose and ask if anything has been missed*
9. *Thanks and dismissal*

Co-creation sessions

For practical tips on how to set up co-creation sessions refer to the Waag Co-Creation Navigator: https://ccn.waag.org/ (and specifically to this section).

4. Consent form

For original formatting, see document as proposed by TimeLex.

E-mail – combined informed consent / information notice

Usage notes

This template is intended to be used for one-to-one interviews arranged via e-mail. The template is intended to get consent for **collection of data for the purposes of using it in the project by any consortium partner**. It does not permit external sharing outside of the consortium, nor publication in a way that allows identification of the interviewee. If that's intended, the text should be tweaked.

Note: you should obtain **confirmation of acceptance via e-mail**, as a proof of consent and of receipt of the information. An e-mail reply is sufficient; no signature is necessary. It is not sufficient to just show this or tell it to an interviewee when you start; you need to have proof of their consent.

The style of this template is relatively casual, since the objective is for this to be sent as a part of an e-mail discussion when a person has already agreed in principle to be interviewed.

Template text

As I'm sure you're aware, we need to make sure that we comply with European data protection laws at all times. For that reason, I'd need to provide you with some legally required information. During the interview, we'll ask you several direct questions, and your answers (along with your name, contact information and affiliation) will be used to help us execute the ACROSS project. We also record interviews by default, so that we can keep notes more accurately; feel free to let us know if you object to this.

While [*name of the ACROSS consortium partner doing the interview*] is in charge of the interview as a data controller, your data will be shared with other consortium partners of the project, as published on our project website, if that's necessary to do the planned project work. Your data won't be shared with organisations or persons outside of the project, nor will it be published anywhere or used for non-project purposes, unless we get a separate permission from you for that.

If you have any questions on the way we work, or if you want to exercise your rights under data protection law (e.g. to access, correct or delete your data), feel free to contact me, or our project data protection officer (hans.graux@timelex.eu). If you feel that we're not respecting your rights fully, you can also lodge a complaint with the data protection authority in your own country. We'll keep your data safe, and will retain it only as long as we need it to show that we've done a good job in ACROSS, after which it will be deleted.

Finally and most importantly of course, we only collect and use your data on the basis of your consent. If you prefer not to participate, or want to withdraw your consent at some point in the future, please let us know and we'll respect your wishes.

Could you confirm via a short e-mail reply that you agree to this? If you have any doubts or questions, please feel free to let me know, of course!

Group interviews - combined informed consent / information notice

Usage notes

This template is intended to be used for larger scale interviews, where a bigger number of interviewees need to provide their consent. As with the e-mail text above, this template too is intended to get consent for **collection of data for the purposes of using it in the project by any consortium partner**.

It **does not permit external sharing outside of the consortium**, **nor publication** in a way that allows identification of the interviewee; **nor is it usable to register people for any kind of mailing list**. If that's intended, the text should be tweaked.
Note: you should obtain **confirmation of acceptance via e-mail**, or via some other written way, e.g. an 'I accept' button on a website, provided that you can link the acceptance to an individual person. That way, you have a proof of consent and of receipt of the information. An e-mail reply is sufficient; no signature is necessary.

The style of this template is a bit more formalistic than the e-mail, since the persons involved may not know us very well yet.

Template text

Consent for collection and use of your personal data in the context of the ACROSS project

As part of the activities of the ACROSS Research and Innovation action, financed under the European Union Horizon2020 Research and Innovation Programme (contract nr. 959157, we would like to ask your **consent** for the processing of your personal data in the context of the project.
Your privacy is very important to us, so we wish to be very clear on what we intend to do with your personal data. If you have questions regarding this consent form, or anything explained herein, please do not hesitate to contact us using the information provided below..

The ACROSS project aims to explore ways to make it easier and more efficient to provide cross-border electronic services, specifically in the context of persons who want to work or study abroad. In order to do so, we want to collect feedback on how to do this most effectively, in a way that matches the needs and expectations of all stakeholders.

To do so, we'd like to ask you specific questions. In doing so, we'll collect several types of information about you, including your name, contact details, your user profile in relation to working or studying abroad, and your preferences and expectations. If the questions are raised through online sessions, these are recorded by default, so that we can keep notes more accurately.
We'll use all of this data only to help us execute the ACROSS project, in particular by:
- Analysing the answers you've provided in order to draw relevant conclusions for the project;
- Communicating with you during and in relation to the interview (but not for any other purpose);
- To create anonymous statistical information, that we can include in project publications (only in a form that cannot be linked to you);
- Ensuring the security and scientific validity of our data collection and analysis;

- And to demonstrate our own compliance with our legal obligations, if necessary.

Your data won't be shared with organisations or persons outside of the project, nor will it be published anywhere or used for non-project purposes, unless we get a separate permission from you for that, or unless we are legally required to do so.

The interview is organised by the following organisation, who acts as a data controller:

[Name and legal form partner(s)]
[Address of registered seat]
[Company identification no./VAT no.]
[Contact details incl. e-mail address]

While that organization leads the data collection, your data will be shared with other consortium partners of the project, as published on our project website, if that's necessary to do the planned project work.

If you have any questions regarding our intended collection and use of your personal data, you may always contact our Data Protection Officer at hans.graux@timelex.eu.

Your participation is purely voluntary, and you may at all times withdraw your consent by contacting us, by sending an e-mail to [add e-mail address].

Your personal data will not be transferred to any country outside the European economic area, unless we inform you of this in advance. In that case, we will ensure that your data are adequately protected through:

- the recipient country having legislation in place which may be considered equivalent to the protection offered within the EEA, or
- a contractual arrangement between us and that third party, based on standard contractual clauses approved by the European Commission.

We only retain your personal data as long as required to achieve the project objectives. Thereafter, we may still keep your personal data for ten years after the project has ended, with the understanding that during this period we may only use the data to demonstrate the scientific validity of the Project outcomes and to demonstrate that the Project was executed in accordance with our legal obligations.

You have the right to request access to all personal data processed by us relating to you. You have the right to ask that any personal data relating to you which are inaccurate, are corrected. You have the right to request that personal data relating to you are deleted, or to limit our use of the data, if they are no longer required for the purposes described above. You have the right to receive a copy of all personal data you have provided to us in a structured, commonly used and machine-readable format. All such requests will be evaluated by us, and addressed as legally required, which means that we may ask for specific evidence.

Each request addressed to us can be sent via e-mail to the e-mail address indicated above. If you have any complaint regarding the processing of your personal data by us, you may always contact us via the e-mail address mentioned above. If you remain unsatisfied with our response, you may file a complaint with the competent data protection authority.
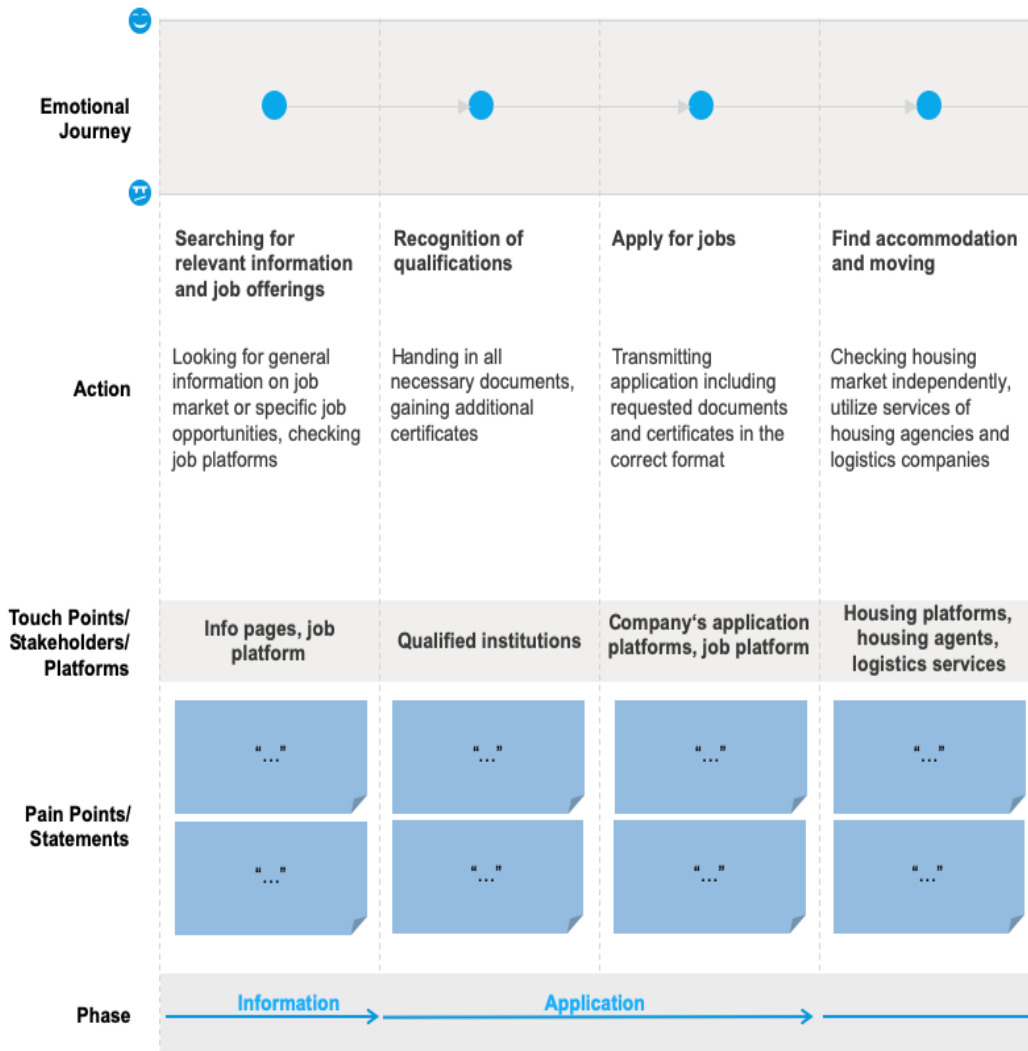
Appendix 5: User Journey Template

TEMPLATE: User/Customer Journey for WORKING ABROAD

Persona: *Name + Picture (+ Age + Situation*

	Searching for relevant information and job offerings	Recognition of qualifications	Apply for jobs	Find accommodation and moving
Emotional Journey				
Action	Looking for general information on job market or specific job opportunities, checking job platforms	Handing in all necessary documents, gaining additional certificates	Transmitting application including requested documents and certificates in the correct format	Checking housing market independently, utilize services of housing agencies and logistics companies
Touch Points/ Stakeholders/ Platforms	Info pages, job platform	Qualified institutions	Company's application platforms, job platform	Housing platforms, housing agents, logistics services
Pain Points/ Statements	" " …	" " …	" " …	" " …
	" " …	" " …	" " …	" " …
Phase	Information →	Application →		

+ Attributes + Attitude)

„Example statement from an interview"

Opening a bank account	Find information about health insurance (and other)	Officially registering the new address	Managing long-term stay, find childcare or schools (for families)
In case you need to have a national bank account, open one	Check if you need to have an additional, new health insurance and if so, apply and obtain. Check for other important insurances.	Check if you need to register to the municipality/city	Registration of vehicles (mobility), pets, sort out taxation, pensions. Gather information on educational system and sign up children.
Banks	**Health insurance providers**	**Public administration**	**Diverse touchpoints**
„..."	„..."	„..."	„..."
„..."	„..."	„..."	„..."

Registration & Organisation → → → → **Long-term stay** →

Appendix 6: User Journey Scenarios

These slides are the result from the internal co-creation session in which the pilot partners came together to create common user personas and journeys for both the work and study scenarios. For more information about the methodology used to come to this result, please refer to section 3.3 of this deliverable.

Potential work persona

Name: Max
26 years old, graduate

Tech-affinity, fluent in English, open-minded, interested in learning new languages & cultures, spontaneous, resilient

Potential study persona

Name: Sophie
25 years old, master student

Tech-affinity, fluent in English and Spanish, open-minded, adventurous, spontaneous, resilient

**SUMMARY OF ALL PILOT
PARTNERS for WORKING ABROAD**

Most important services

➢ Housing services – search via real estate agencies & websites, job-specific websites (e.g. "aupair-world") or social media
➢ European health insurance – contact via telephone or mail with home country insurance for clarification
  ➢ Registration at general practitioner
  ➢ Additional registration for travel insurance
➢ Liability insurance
➢ Registration at local authorities, registration of place of living, deregistrating from the national system and update of contact details
  ➢ Registration for tax (residency) and employment (type)
  ➢ Tax declaration (public & private)
  ➢ Social benefits: Social insurance number service / pension rights (calculation)
➢ Opening a bank account

Less important services

➢ Getting a local SIM card (not really necessary due to European roaming)
➢ Acquisition of a public transportation ticket
➢ Registration of private car
➢ Recognition of professional and private certificates (work & academic qualifications, marriage certificate)
➢ Information on local language course opportunities, local life, rents, costs of living
  ➢ Application opportunities/platform

<u>Pain Points / Typical Problems</u>
➢ *Very complicated & time-consuming process of searching a flat abroad. On-site visits demanded and many unreliable flat offers or landlords.*
➢ *Too many bureaucratic obstacles - many on—site visits at local authorities needed.*
➢ *Language barrier at local authorities or concerning required documents.*
➢ *Unclear terms of and access to services*
➢ *Unclear expenses related to public services*

<u>Desires for 2030 / Suggestions</u>
➢ *It should be possible to organize all officially required registrations online and in advance from the home country.*
  ➢ *This should include examples/tutorials of which forms need to be filled out, for which purposes, and when.*
  ➢ *These should also be available in different languages/automatically translated. Following the example of the EU.*
➢ *A clear **check-list** (potentially interactive online) with description of the missing requirements should be provided.*
  ➢ *It should be continuously updated, maintained, and automatically translated.*
➢ *A platform / data cockpit with one-single point of access for all documents etc.*
  ➢ *Connect the platform with the housing and bank account market.*
    ➢ *"As long as I know that it is a public page provided by EU or the state, I feel safe"*
    ➢ *"Transparent data cockpit where you see who has accessed your data, you sent your data to whom etc."*
    ➢ *"Data exchange not via mail, but rather on a central platform " ("one single point of access")*
➢ *Give consent to have documents shared between different trusted local authorities -> interoperability.*

CENTRAL User/Customer Journey for WORKING ABROAD

Phase	**Information** →		
Action	**Search for job offerings** via Google, online portals and Agencies Applying for jobs through Online via marketing on social media platforms	**Find accommodation** On one's own: - via Google and real estate platforms - Apartment viewing on-site Real estate Agency: - Support by real estate agents, communication via mail or telephone	**Take care of everyday services** No foreign bank account: - Only cash, withdrawn at ATM from German bank account Foreign bank account: - Easy online opening of bank account - Difficult process of termination (in persona on-site) Mobility (car, bike, PT, etc.) SIM card
Touch Points/ Stakeholders/ Platforms	Social media, job platforms, external recruiters, recommendation program, mail or telephone	Real estate agency, real estate homepages	Bank office, homepage (for an appointment), phone
Desires (Statements) 😊	For any application: "Clear checklist with all required documents helps" "Central information about moving, contract types, salary levels & expenses should be provided"	"You should be able to organize everything from home or remote" "It was hard to move with a big dog, nobody wanted to rent out an apartment"	Digitized services
Pain Points (Statements) 😫	"I just screened every single platform" "A lot via external recruiters or agents" "Speaking the local language helped" "I was asked to get official statements from my previous employers, for that I had to go back and collect them"	"Searching for flats worked all NOT digital, only by person face-to-face" "Bank account was needed to rent a house, but house residence was needed to open a bank account" "It is difficult to find residence and it requires a lot of time" "I was registered at my parents place in Germany throughout the whole time"	"Not been aware of the advantages of the bank account" "Opening a bank account felt like 'outdated customer support (in person)"

Registration & Organization

Deal with health services

- Clarification and gathering of information with help of german insurance (mail and telephone)
- Find a general practitioner
- gathering of information from national insurance organization (mail and telephone)
- submitting documents to obtain insurance certificate (to be submitted in the destination country

Official registration at local authority

- Public administration only with appointments and in person

Deal with taxes

- Digital booking of appointment but manual process on-site on foreign language

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Mail, telephone

"Contact with public administration only works with appointments & in person"
"Physical presence at several Public Office Organizations is required"

Authority offices, town hall, mail, telephone

"I want to know what I need to have and to organize in order to be sure"

"I want a simplified process with less steps and less documents gathering"

"Applying for national ID number should be digitally doable from your home country"

Use of digital platforms is essential for aquiring documents required get tax & social security no

"Identification via personal ID (home country) and no need for application of a foreigner ID."

Services must be described in human language

"I clarified things with the German insurance via mail & telephone"

"There is only one standard health insurance"

"Online application for S1 certificate received no response. It took three visits in person to EFKA, and a lot of documents. Also physical presence (2 visits) for submitting the S1 certificate to the Insurance Organization in Belgium.

"I lived there multiple years without an official registration"

"Have to apply for EU citizen card for tax reasons, every 5 years although I am a European Citizen"

"It was super annoying to walk to every local municipality in order to register"

"Certificate issued by the employer needed a stamp by Citizen Service Center for certifying the validity of the signature."

"Very uncomfortable experience: I have registered myself at the tax authority and when I googled myself right after it, my address and my date of birth appeared in the internet, so everybody could read"

"I had to wait for 6 weeks to get my tax ID, I did not receive salary for 2 months because of that"

"In order not to get in trouble you have to research the tax system thoroughly before going"

SUMMARY of ALL PILOT PARTNER USER RESEARCH for STUDYING ABROAD

Most important services

➢ Information about studying abroad – where to study, what requirements, which documents to fill out, costs of living and experience reports of former students + Guidance for initial steps (register residence, health, mobility cards, bank account, "checklist")

➢ Get financial funding – via mail and paper documents

  ➢ Simplification and Digitization of the processes for: application to ERASMUS for selecting study courses, creating the learning agreement, matching courses, adapting grades, let check the relevance of the courses in a common language

➢ Application to university abroad / recognition of academic/professional diploma – via online forms and paper documents

➢ Housing services – searching for flats via university abroad, real estate websites or social media

Less important services

➢ Mobility: Acquisition of public transportation ticket: used by everybody, but not difficult. Bike renting, bike/car sharing, buying a bike, etc.

➢ Health insurance - European health insurance or additionally travel insurance

➢ Registration of place of living

➢ Translations, Postpone army duty

➢ Opening a bank account (for part-time jobs mainly)

➢ SIM card (often European roaming is fine, but sometimes you need it for public/private digital services)

➢ Depending on the country: postpone army duty

Pain Points / Typical Problems
- *Submission of university application documents to both universities (home country and abroad).*
- *Many paper-based processes and required on-site visits at local authorities.*
- *Language-barrier concerning official registration and application documents.*
- *No or only complicated access to experience reports of former students.*
- *Erasmus learning agreement: difficult to get a good overview of the courses (credits and content, etc.)*
- *Cultural differences (e.g. renting conditions, prices)*
- *Housing: finding, application, and confirmation of getting a house often works in circles, and you need to be there in person.*

Desires for 2030 / Suggestions
- *User-friendly platform for all required application documents and overview of missing steps:* **check-list** *(potentially interactive online)*
- *More cooperation/data exchange between universities concerning require ments and exchange of documents as well as accreditation of study courses.*
  - *"Data exchange is alright as long as I know it and I know what happens to it" = "Only with my consent"*
  - *"Data Governance should include an active decision to know what you release your data for, so that you can control who uses your data".*
  - *"Overview of all data would be great... with an overview of process status"*
  - *"As long as I know that it is a public page provided by EU or the state, I fee I safe"*
  - *"Fingerprint would be ok as long as it's connected to your national ID"*
- *Officially required registrations should be possible remotely and in advance*
- *Information must be in any «human language»*
- *Information has to be constantly updated and not contradicting*
- *In case it would be the one-stop migration portal: it can never break down and must be very robust, otherwise there would be a lot of delays.*
- *More information on whether students need to register (regarding residency) in their new country and deregister in their old country. There was a lot of uncertainty.*

CENTRAL User/Customer Journey for STUDYING ABROAD

Phase	Information.	Application		
Action	**Search for university abroad** Informational events: - Mostly organized by home university - Centrally based on experience reports from former students For undergraduate studies: IB or universities websites	**Apply for Erasmus funding** - Funding/ financial support for going abroad - Clear process concerning required documents - Online portal provided to select courses - No digital application, everything via letter and paper documents - Application to both universities - course matching and score adaptation by home uni prof	**Apply at university abroad** - User-centric and quick responses - First selection and application at home university, afterwards application at foreign uni - Required documents: ECTS, CV, motivational letter, learning agreement (x3), language certificate, Translations	**Find accommodation** - Private search via internet- mostly very complicated and sometimes not trustworthy offers - Private search in cooperation with agency (provision based) - Needed documents/ info: Studies certificate, IBAN, ID, deposit, Contract, (birth certificate for a bank account) -paper-based
Touch Points/ Stakeholders/ Platforms	International or Erasmus office at home university, information events, experience reports, IB, univesities websites	Online platform, via post, E-Mail, scanned documents	International office at home university, university website, paper documents, online forms, Central platforms: studielink.nl (Netherlands), IB	Proposals from university abroad, student accommodations, real estate agencies, private internet search, whatsapp
Desires (Statements) ☺	"More cooperation between universities needed concerning requirements & documents" All information should be provided in a single portal, at least in English	Simplification and digitization of the process "Overview about courses which ones are similar to the ones abroad (based on previous approveals)"	"Would have been way easier to let my documents exchange between universities	"Would have been nice to have an automatic deregistration through housing provider"
Pain Points (Statements) 😠	"No overview of study courses & lack of information for ERASMUS exchange students" "Easier access to experience reports of former students was great; gives you a good feeling"	„A friend of mine nearly stopped her application because of the paper-based processes" "Bad communication, delayed answers and not clear if everything worked out" Language problem with French university If Erasmus coordinator is not supportive the student has to figure out everything	"Learning agreement was, highly annoying not to have an overview to know what equivalent to which course" "Needed to make appointments with professors in Germany". „Recognition of diploma is lengthy"	"Searching for apartments is a huge topic (no pictures, no trust, no details)." "High fees for trash & water must be clearly provided beforehand." Contract in German (language problem) Sometimes a bank account can't be opened without a residence and vice versa

Registration & Organization

Deal with health services	Official registration at local authority	Take care of everyday services	Optional: Postpone Army duty
- Sometimes difficult to gather information, no support by home country insurance - Combination with travel insurance possible - Due to european health insurance no further action needed - Register at general practitioner	- Complicated appointments at public offices or town - High level of frustration due to documents in foreign language and on-site appointments - No info by university (vs registration via gov.uk: everything is done well digitally) - Documents: passport, Digital proof of university studies, residence certificate (hard-copy)	Mobility: - Some countries offer student discounts for public transport or included in Academic ID - online process or physical process in person - Concepts of shared-bikes via mobile app - Used bikes via market places - Car-sharing concepts -SIM card, opening a bank account	- Depending on the country - Proof of studying abroad, signed and stamp from university -Translation by British council - Deliver the documents to the Citizen Service Center (physical presence) - Give authorization to notary to run the procedure on your behalf
Telephone, mail, websites, websites of travel insurance companies	Authority offices, town hall, international office at university, mail, telephone	Apps, websites, ticket office, sharing platforms	
	"Applying for national ID number should be digitally doable from your home country" "It makes sense to connect the systems cross-border"	"Highly flexible options like Swapfiets to rent and cancel online"	
"I wasn't sure if health data from abroad was transferred to my home insurance. In the end, it worked. No idea, how." "The information flow was bad"; "the insurance provided no information at all"	"Too much bureaucracy, bad information flows, l ong process" You have to go with binder of documents and there is always something missing Registration took a while as I needed to prove my residence with bills etc.	"Mobility is a huge problem - very bad to travel to destinations as a student" "Physical presence was needed at ticket office"	"inflexible procedure for someone studying abroad"