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REPORT ON THE TRUST BUILDING SYSTEM USER DESIGN RESEARCH

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List of Acronyms

A.C.	Actionable outcome
EGI	European Grid Infrastructure
EOSC	European Open Science Cloud
GoTriple	TRIPLE online platform available at GoTriple.eu
NCP	National Contact Point
NGO	Non Governmental Organisation
OPERAS	Open Scholarly Communication in the European Research Area for Social sciences and humanities
OPERAS-P	Open Scholarly Communication in the European Research Area for Social sciences and humanities - Infrastructure
PhD	Doctor of Philosophy
R.	Recommendation
SIG	Special interest Group
SME	Small and Medium Enterprise
SSH	Social Sciences and Humanities
SWOT analysis	Strength Weaknesses Opportunities Threats analysis
TBS	Trust Building System
TRIPLE	Transforming Research through Innovative Practices for Linked Interdisciplinary Exploration
TRL	Technology Readiness Level

DEFINITIONS

“Multidisciplinarity refers to an activity associated with many, multiple, or more than one existing discipline.”

“Transdisciplinarity is that which concerns transcending the disciplines, going across and through the different disciplines, and beyond each individual discipline.”¹

“Trust is understood as a relational attribute between social actors (interpersonal trust) where trusting actors willingly put themselves in a position of vulnerability in order to achieve a positive outcome.”²

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¹ Alvargonzález, David. (2011). Multidisciplinarity, Interdisciplinarity, Transdisciplinarity, and the Sciences. *International Studies in the Philosophy of Science*. 25. 387-403. 10.1080/02698595.2011.623366.

² Our definition of trust is derived from Becker, M. & Bodó, B. (2021). Trust in blockchain-based systems. *Internet Policy Review*, 10(2). <https://doi.org/10.14763/2021.2.1555>

Executive summary

In the present deliverable on the Trust Building System (TBS) end-user co-design research (D3.3), we provide the foundation for one of the five innovative services of [GoTriple](https://www.GoTriple.eu/)³, which also includes a Crowdfunding service, a Recommender System, a Visualisation and Discovery System, and an Open Annotation Tool. The TBS is a human-curated referral system whereby people provide personal recommendations to each other. Its purpose is to help Social Sciences and Humanities (SSH) researchers connect to reliable partners in order to fulfill their unmet needs. Examples include finding the right coordinators for Horizon Europe consortiums; experts such as PhD students or policy makers; and end-users such as workshop participants or pilot communities.

Section 1 of the deliverable provides an overview of recommendations that we extracted through a careful review of previous TRIPLE project deliverables. Next, section 2 presents our iterative approach using advanced prototypes to conduct research with end-users to co-design the system. Finally, section 3 lays out the details of a comprehensive survey, which was circulated among consortium members and a select few of their partners, to get a better understanding of their pressing needs when it comes to reaching out to new partners. The combined results of all these reported activities are compiled into one list of recommendations, which will be used as a guiding document as we continue Task 5.3 — developing the Trust Building System for TRIPLE.

Looking at the final results, we recognise that the Trust Building System offers unique features that can increase GoTriple's appeal, notably thanks to the trusted components that distinguish this service from mainstream social networks. Finally, the integration of those results into D.5.3 "Trust Building System" paves the way for the development of the Trust Building System and its integration into GoTriple.

³ <https://www.GoTriple.eu/>

1. INTRODUCTION

The Trust Building System (TBS) is one of the “social engines” and one of the innovative services of the GoTriple platform. Its purpose is to help Social Sciences and Humanities (SSH) researchers connect to reliable partners within and outside the SSH community. It furthers the main objective of GoTriple which is to dramatically improve the impact of Social Sciences and Humanities (SSH) thanks to a discovery solution based on three different kinds of objects: data (and publications), profiles, and projects. The TBS offers unique features that can help SSH researchers enhance potential synergies in multistakeholder environments where horizontal cooperation is required. As such, it increases GoTriple’s appeal notably thanks to the focus on trust that distinguishes this service from other social networks. Meoh ASBL is responsible for designing the trust architecture and closely coordinating and communicating with Nuromedia GmbH, which is leading its technical implementation in Task 5.3 (“Trust Building System development and integration in the GoTriple discovery platform”).

The present report is the outcome of the end-user co-design research of the TBS conducted in Task 3.3. Our approach is based on using advanced prototypes by adopting an iterative process. Research has been conducted with end-users in order to co-create the system with them. We started by understanding what their needs were, then discussed how it could be translated into a usable interface and how it could be integrated within the GoTriple platform. At every stage, the design research was conducted in a user-oriented way, making sure to keep the focus on the user experience despite the various processes, products and technological concerns.

We believe that a successful digital product needs a balance between desirability, feasibility, and viability. Though this report focuses on the desirability, it directly informs the feasibility and the development of the TBS and its integration within GoTriple. This report has also taken into account the outcomes of other TRIPLE deliverables (outlined in section 2), namely D.3.1 “User Needs”, D.7.1 “Stakeholder and Opportunity Analysis”, and D.8.3 “Communication Strategy”, to anticipate the exploitation and viability of the service, and to foster engagement and product/service adoption.

1.1 Objectives, structure, and methodology of the report

The current report provides the context for the development of the TBS. The main objectives of the reported activities were:

- to get insights (needs, purpose, principles, values, roles) into GoTriple actors,
- to obtain knowledge on social media Community Guidelines,
- to receive detailed information on the user experience from the onboarding to the conclusion of the user journey,
- to gain input for the TBS integration within GoTriple.

For achieving these, a broad mix of methods and tools were employed. The report begins with the review of previous TRIPLE deliverables in section 2, then continues with the analysis of the eight workshops in section 3. In order to complement the workshops and to better understand the pressing needs of the potential TBS users, we disseminated a survey, the results of which are presented and analysed in section 4.3. We also present in section 3.8 the results of the discussion on how to best integrate the TBS within GoTriple. Finally, the report ends with a summary section of concluding remarks.

Overall, and according to the recommendation from Task 8.3 on the “target audience”, we involved a majority of SSH researchers (69%), while managing to include representatives of most GoTriple Target Audience categories, with the exception of media (0%).

Workshop participant representation spread over a variety of organisation types:

- SMEs-NGO-National Contact Point (19%),
- Librarians & open repositories (4%),
- Publishers (2%),
- Public authority (2%),
- Policy Making (2%),
- Citizens (2%).

Workshop participants represented seventeen countries, including ten EU Member-States, and their age ranged from twenty-five to sixty-five years old.

TABLE 1: General statistics on workshop participants

Participants:	- Number	48
	- Gender	27 females; 21 males
	- Age range	From 25 to 65 years old
Type of workshops:	Transdisciplinary workshops (6) Multidisciplinary workshop (1) Single disciplinary workshop (1)	
Type of stakeholders:	SSH (33) SMEs (4) NGOs (2) National Contact Points (3) Librarians & open repositories (2)	

	Publisher (1) Public authority (1) Policy Making (1) Citizen (1)
Countries represented:	Total (16) EU Member States (10) Neighboring countries (3) Non EU countries (4) -- Austria (2) Belgium (3) Colombia (1) Denmark (1) France (8) Germany (6) India (2) Italy (5) Luxembourg (3) Malaysia (1) Netherlands (1) Poland (3) Portugal (2) Romania (2) Serbia (1) Switzerland (1) United Kingdom (2) United States of America (4)

2. KNOWN INTERACTIONS WITH OTHER TRIPLE TASKS AND WORK PACKAGES

2.1 Interaction between the design research (T3.3) and its implementation (T5.3)

The main goal of Work Package 5 is the design, development, and integration of innovative applications and tools that will augment GoTriple’s core services. These federated applications and tools will deliver additional services for SSH researchers and other TRIPLE stakeholders. Therefore, there is a direct link between T3.3 “Trust building system user design research”, and its ongoing implementation, T5.3 “Trust Building System development and integration in the GoTriple discovery platform”, since the output of T3.3 directly informs T5.3.

2.2 Interaction with T3.1 “User needs”

The deliverable D3.1 “[Report on User Needs](#)” provides the initial identification of the user needs for GoTriple and the “Personas” and “Scenarios” produced to better understand users and their needs with regards to a novel discovery platform. The concepts of “Personas” and “Scenarios” are taken from Interaction Design, a user-centred approach which puts the user at the centre of the design process. Thirty-seven qualitative interviews were conducted (twenty-six with social sciences and humanities (SSH) researchers and eleven with other stakeholders) across Europe. From the analysis of the interviews we created eight Personas (six SSH researchers and two non-academic stakeholders) with the associated Scenarios. The Personas and Scenarios then led us to the identification of a list of needs which will constitute the basis for the subsequent design of the GoTriple user interface and for the associated co-design activities.⁴

To best conduct our co-design workshops within Triple task 3.3 “End-user research and co-design”, we looked at what had been done in the previously completed task 3.1 “Identification and Formalisation of User Needs”. In short, there is a need for academic users to have some kind of social bridges to better connect and work within, across, and beyond their own fields of expertise and disciplines. The following specific user needs, identified in Task 3.1 and gathered in table 2, inform the design (Task 3.3) of an innovative TBS.

⁴ A more detailed list of user needs for researchers on different career levels, policy makers and SMEs can be found in Section 8.1 of the deliverable D3.1 “[Report on User Needs](#)”.

All those needs were categorised as wishes, belonging to the desirability category. Along the workshops' iterative process we kept them in mind in order to put them to the feasibility challenge. Indeed, while we conducted the workshops, we were in constant dialogue with the developers in charge of the TBS (Nuromedia GmbH⁵). In the frame of Task 5.3, they provided regular feedback on the feasibility of the ideas, bearing in mind the budget and technological limitations.

TABLE 2: Lessons learned from Deliverable 3.1 for the design of the TBS.

Summary of Lessons learned/"recommendations" (R.) from Task 3.1 "User needs" for Task 3.3 "TBS user design research" & Task 5.3 "implementation of Task 3.3."

1. Provide academic users with a social network to better connect and work within, across, and beyond their own fields of expertise and disciplines.
2. Enable users to find academics/key researchers within an area of expertise. (D3.1/1.5).
3. Enable users to view mutual acquaintances.(D3.1/1.8)
4. Enable users to send invitations to an event. (D3.1/1.11)
5. Enable users to find out what type of collaboration other researchers are interested in. (D3.1/3.12).
6. Enable users to search for a native English speaker in their academic area. (D3.1/4.8)
7. Enable users to view Special interest Groups (SIG). (D3.1/ 2.9)
8. Enable users to connect with others via the SIG. (D3.1/ 2.10)
9. Enable users to view posts in the SIG. (D3.1/ 2.11)
10. Search "Communities of Practice" by topic or project. (D3.1/25)
11. Enable searches to find and follow relevant projects and people rather than just publications. (D3.1/26)
12. Enable academics to provide and receive introductions and recommendations to and from friends/colleagues/trusted contacts. (D3.1/27)

2.3 Interaction with D7.1 "Report on Stakeholders and Opportunity Analysis"

Before conducting the end-user co-design workshops for T3.3, we searched for guidance to optimise the output of the workshops. Deliverable 7.1 proved to be a valuable source of information thanks to its thorough analysis of existing services similar to GoTriple and provided us with five key takeaways:

⁵ <https://www.nuromedia.com/>

1. At first, we noticed that there is no known TBS competitor among the twenty-six competitors' platforms depicted by the *"Overview of analysed platforms"* (Page 25 of D7.1). There are indeed several algorithmic-based recommender systems, but no human-based online referral systems (See *"Competitors' platforms main features over 5 dimensions"*, D7.1 Page 28). The human factor of the TBS is bound to be more personalised and a more efficient conduit for facilitating potential collaborations.
2. Second, the *"TRIPLE Power-Interest Matrix"* (Page 14 of D7.1) helped us understand the priority targets of GoTriple: SSH and non SSH academics, media, policy makers, libraries and Open Access repositories, SMEs, publishers, public authorities and citizens. This information was key for selecting workshop participants.
3. Third, looking at the SWOT (Strength Weaknesses Opportunities Threats) analysis (D7.1 page 41), we noticed that:
 - a. The *"lack of previous experience in working together"* was described as a *"weakness."* We took it into consideration to look for ways to address this issue in the Trust Building System.
 - b. The *"negative effects of the Covid-19 pandemic on projects and the economy"*, was described as a threat. We addressed this question in Section 4, Question 3 of the widely distributed *"Urgent and Pressing needs"* survey, by asking participants their preferred media to find reliable partners in time of Covid.
 - c. To *"reach a wider audience (policy makers, SME)"* and to conduct *"interdisciplinarity research to overcome silo effects"* were described as opportunities. We took good note of it by merging personal and professional networks for people from different backgrounds to meet and collaborate.
4. Fourth, we duly noted the figure 13 of [D7.1](#)⁶ which requests that landing pages have to be easy to understand; and that too many menus/services/functionalities may overwhelm users.
5. Fifth, we noticed that the *"transition from traditional to digital, and to Open Source services for SSH,"* was described as an opportunity. We took good note of it by mitigating the raw interpretation of user data in our *"Urgent and Pressing Needs"* survey. To the question *"What is your preferred way of communication to reach out to reliable partners?"*, a majority of respondents chose emails over other communication methods. However, a 2020 study lead by [Creative Strategies](#)⁷ shows that only people aged 30 or more are still massively using emails as preferred communication channels while people under 30 prefer using chats.

⁶ <https://cutt.ly/fQs89Dt>

⁷ <https://creativestrategies.com/>

TABLE 3: Lessons learned from Task 7.1 for the design of the TBS.

Summary of Lessons learned/“recommendations” (R.) from Task 7.1 “Report on Stakeholders and Opportunity Analysis” for Task 3.3 “User Design Research” & Task 5.3 “Implementation of Task 3.3.”

1. Create an “Introduce” function between people who don’t know each other but who could help each other via a trusted intermediary. An alert would be prompted in case users are already connected.
2. Respond to the concerns regarding Covid-19's effect on work life. The “negative effects of the corona pandemic on projects and the economy” was described as a threat. We addressed this question in the widely distributed “Urgent and Pressing needs” survey (See in Section 4, the question 3 of the TBS SURVEY ON SSH “URGENT AND PRESSING NEEDS”).
3. Increase the chances of requests to be solved by making them visible to second degree connections through the “featured peers.”
4. Make landing pages easy to understand; too many menus, services and functionalities may overwhelm users.
5. Consider chat and emails as preferred social media, potentially audio recording too.

2.4 Interaction with the D8.3 “Communication strategy⁸”

Looking at the Communication Strategy and TRIPLE target audience, the TBS is related to two of the main goals of GoTriple.

1. At first, it will contribute to “foster interdisciplinary and cross-cultural collaborations”,
2. Second, it would then help to “increase economic and societal impact of SSH resources” because of improved interdisciplinary and cross-cultural collaborations.

⁸ <https://cutt.ly/5QdqEmA>

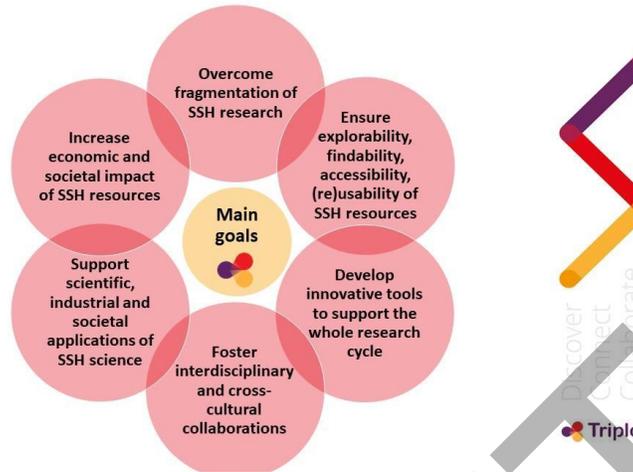


FIGURE 1: Main goals of the TRIPLE project (page 10 of D.8.3).

TRIPLE target groups have been divided on two main differentiating criteria: academic and non-academic stakeholders. Subsequently, five representative stakeholder groups were identified for each main category, including possible subgroups as shown in Figure 2 below.

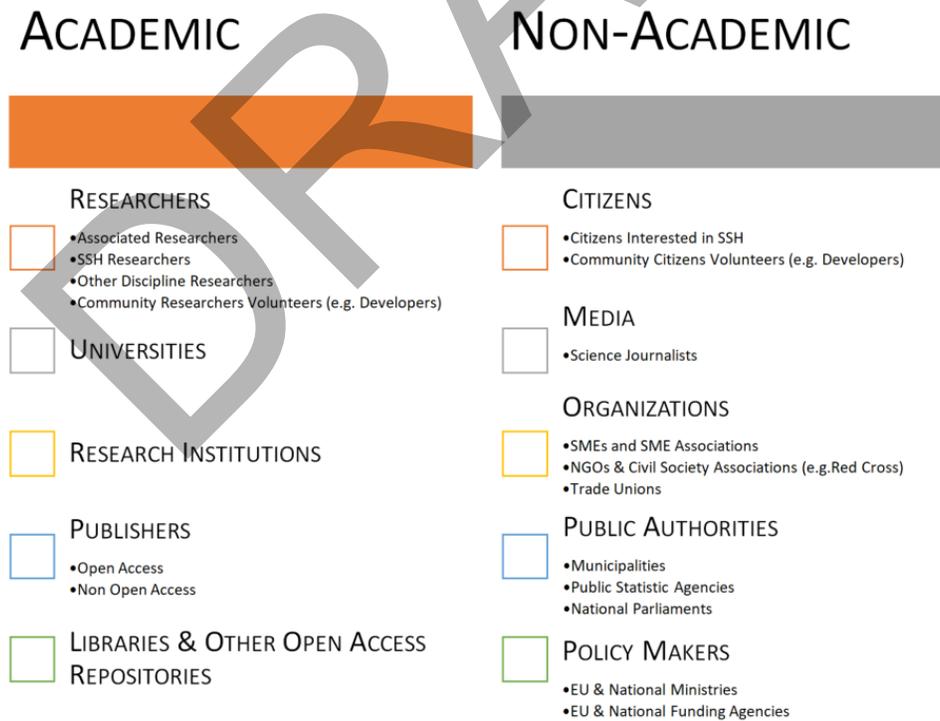


FIGURE 2: TRIPLE stakeholder overview and categorisation from report D.8.3.

Future GoTriple users have also been classified in the influence-interest matrix depicted in Figure 3. The general management strategies can be described as follows: stakeholders with high power and low interest shall be kept involved with medium efforts. Those with low interest and low power shall only be involved with minimum effort. A stakeholder with low power and high interest in a project shall be kept informed, and finally, the high power, high interest stakeholders shall be closely involved and informed. For a detailed definition of the four quadrants, see Section 2 (pp. 11–14) of D7.1 “[Report on Stakeholder and Opportunity Analysis](#)”.

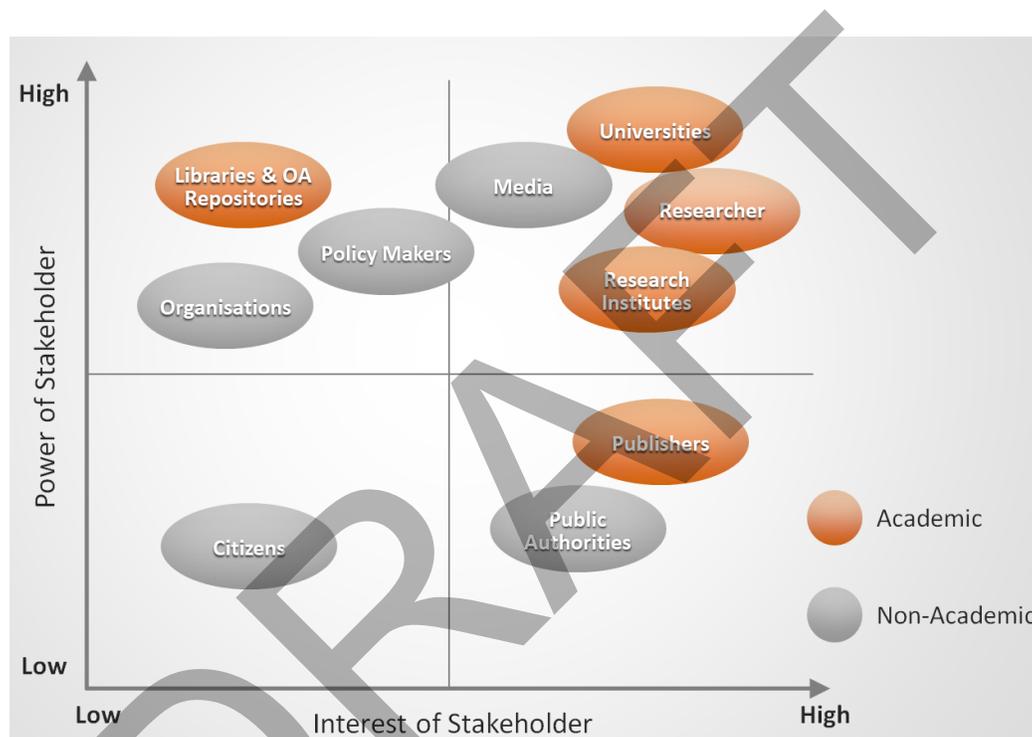


FIGURE 3: TRIPLE power-interest matrix.

SSH researchers being the key stakeholders, the co-design of the TBS focused on them. To ensure that we also included non-academic stakeholder requirements, a smaller number of them also participated in the co-design.

3. END-USERS AND CO-DESIGN WORKSHOPS

3.0 Scope, methodology, and highlights

3.0.1 Scope

Eight co-design workshops involving end-users were organised with a particular focus on single-disciplinarity (users from one discipline), multidisciplinary (users from different disciplines), and transdisciplinarity (multistakeholder environments involving non academic users such as policy makers, business networks, and Civil Society). In these workshops, ideas were discussed, further improved and prototyped. The output of those eight workshops was used to design a tailored TBS for GoTriple. Next to these workshops, a user survey was conducted with members of the consortium and with a selected few of their partners to understand their specific and urgent needs when it comes to multistakeholder cooperation. This survey complements the workshops with fundamental information to shape the final version of the system. The results of this task contribute directly to Task 5.3 (Trust Building System: M1-M40).

3.0.2 Methodology

From a logistic perspective - due to Covid19 - we had to replace in-person workshops by online ones, using online meeting services. To address the constraints of the online format, we decided to restrict the attendance to a maximum of 10 participants. In practice, we came to realise that six participants was an ideal number of attendees allowing more user engagement and more in depth contributions from each participant.

From a process perspective, we chose to conduct and to coordinate those eight workshops according to the Chaordic process⁹, which is a process meant to help define agile organisations. The methodology goes through the Why (or the purpose), the How (or the process), and the What (or the product) through seven consecutive steps:

1. **Purpose:** “a simple statement of intent that identifies and binds the community together as worthy of pursuit.”

⁹ <https://www.pmi.org/learning/library/leadership-model-virtual-pm-environment-108>

The first workshop helped clarify the Need & Purpose of the Trust Building System by concluding that we should design a tool to connect reliable partners with one another while conveying a sense of trust in online relationships, and being user-friendly.

2. **Principles:** “as precepts against which all structures, decisions, actions, and results will be judged.”

The second workshop gave clear indications not only on the Values and Principles that should help meet the TBS purpose but also on how they could be further translated in the fifth workshop as the TBS Community Guidelines.

3. **People:** “to define the key stakeholders who will benefit the solution.” &
4. **Concept:** “a visualization of the relationships between all of the people that would best enable them to pursue the purpose in accordance with their principles.”

The combined third and fourth workshop “TBS, Who is in the room?” helped us understand the TBS users' needs when it comes to reaching out to reliable partners as well as how they would like to interact with one another thus addressing these two points: “People” and “Concept.”

5. **Limiting Beliefs:** “to detect and alleviate the unconscious roadblocks that may hinder the proposed solution.” &
6. **Structure:** “as the embodiment of purpose, principles, people, and concept in a written document capable of creating legal reality in an appropriate jurisdiction, usually in the form of a charter and constitution or a certificate of incorporation and bylaws.”

The combined fifth and sixth workshop helped us define Community Guidelines to ensure TBS users share a common set of values while aligning expectations and behaviours, in addition to the Terms of Use and Privacy Policy documents thus addressing these two points: “Limiting Beliefs” and “Structure.”

7. **Practice:** “as the deliberations, decisions, and acts of all participants in the community functioning within the structure in pursuit of purpose in accordance with principles.”

The workshops number six and seven helped us get some very valuable user feedback on the TBS prototype by attempting to solve real-life use-cases and requests.

Among the anticipated issues, we considered the huge variety in SSH research (i.e. many disciplines), the wide variety of actors they might be in touch with, as well as the wide geographical spread (i.e. world and Europe wide) of the TBS potential users. Additionally, we took care to respect the gender balance of participants. We tried to include as many representatives as possible from the TRIPLE target groups as indicated in the Power-Interest Matrix (see figure 3), namely: Universities, Researchers, Research Institutes (SSH and non SSH academics), Libraries & Open Repositories, Policy Makers, Media, Publishers, Public Authorities, Citizens.

3.0.3 Highlights

Before digging into the details of each workshop, please find herewith a table highlighting the key findings. We have organised them from a user journey perspective, hoping it would help to better grasp the spirit and concrete functionalities expressed during the TBS end-user co-design workshops.

In addition, we have gathered in Appendix 2, the thirty-seven recommendations made during the eight TBS co-design workshops. Those recommendations need to be reviewed, streamlined and checked against technological and budgetary constraints before being implemented. The recommendations are additions to the initial seventeen recommendations picked from Deliverables 3.1 and 7.1, making it a total of fifty-three recommendations and two actionable outputs for the TRIPLE Task 5.3. All of those are summarised and organised following a user journey logic in Table 4.

TABLE 4: Summary of recommendations from a user journey perspective.

1. The TBS is meant to enable trusted relationships between new potential partners. To achieve this goal, workshop participants recommended that we create a user-friendly, invitation-only, human-sized, and human-curated network where people will recommend and introduce each other. Human-sized means 150 people at maximum, and the limited number of people in everyone's network means that peer pressure would trigger social distancing thus providing a systematic incentive to prevent abusive behaviors.
 - Make the user experience friendly, embed some support — for instance a FAQ section, or a video explaining the user journey and some key functionalities, or a chat bot. Similarly, the TBS should be easily visible on GoTriple.
 - Allow users to import contacts from other social media, and then choose from the list who to invite on the TBS.
 - Allow trusted peers to be showcased or featured, in order to become visible to second degree connections. Those not featured would remain non visible to second degree connections.

- Display the amount of mutual contacts users have with one another could be useful to build trust.
- Make TBS pages easy to understand as too many menus and services may overwhelm users. Make the TBS desktop and mobile friendly.
- Make the TBS as environmentally friendly as possible.

2. The user journey would start by the completion of a profile that would display information meant to reflect the trustworthiness of users. To achieve this goal, workshop participants recommended that user profiles integrate both formal and informal information to convey a human feel and to inform about their personality while featuring their expertise and experience.

- Implement or adapt the suggested TBS cooperation profile.

3. Furthermore, and to ensure that users are safe on the TBS, Community Guidelines should be integrated in the menu and easily visible to new users. Those should reflect the core Values and Principles that will bind the users of the TBS.

- Implement the Community Guidelines which are bound to evolve over time and to adapt to the TBS life.

4. Once the user has a populated Trusted Network, the TBS should help find the right expert to address a request or a need. To achieve this goal, workshop participants recommended us to:

- Create the ability to post a request on a newsfeed that should be the default landing page.
- Place the latest activities on top.
- Increase the chances of requests to be solved by making them visible to second degree connections through the “featured peers.”
- Enable TBS users to forward published requests to trusted contacts who could potentially solve the request because they would have the expertise or would know someone who would have the required expertise.
- Create an “Introduce” function between people who don’t know each other but who could help each other via a trusted intermediary. An alert would be prompted in case users are already connected.
- Enable chat and video communications.
- Enable the creation of a “special interest chat group” to facilitate collaborations, discuss and share ideas.
- Enable the editing of comments made on publications and improve the visibility of the “comment, forward, repost, bookmark” icons.

3.1 Workshop #1: Need and Purpose of a Trust Building System

3.1.1 Context and objectives

On June 12 2020, MEOH ASBL organised the first TRIPLE T3.3 workshop. It took place during the Digital Government Society’s annual conference, which was originally planned to take place in Seoul, South Korea, but instead was conducted online due to the Covid-19 pandemic. We thought that organising a workshop in this high profile conference would be a good opportunity to showcase the TRIPLE project while getting meaningful input from top level academic and Civil Society experts.

TABLE 5: Workshop#1 presentation

Presentation webpage	https://www.meoh.io/workshop-1
Type of workshop	Transdisciplinary
Date	June 12, 2020
Length	90 minutes
Participants:	
- Number	8
- Gender	2 females; 6 males
- Age range	From 25 to 50 years old
Type of stakeholders represented	SSH (4); NGOs (2); SMEs (2)
Countries represented	France (1), Italy (1), Germany (1), Luxembourg (1), Austria (1), United Kingdom (1), India (1), Malaysia (1).
Hosted by	The Digital Government Society http://dgsociety.org/dgo-2020/

Designing a system to build trust among stakeholders includes understanding why such a system should be built in the first place. For this reason, we asked potential users to reflect on the Need and Purpose of such a system. Hence the following question was imposed: “Why do we need a

TBS to address multistakeholder cooperation?”. The objective of the workshop was thus twofold:

1. First, to identify a main reason (need/purpose) for increased cooperation between SSH and other types of stakeholders.
2. Second, to identify concrete solutions on how to improve this multistakeholder cooperation.

We planned to reach the objectives of the workshop with:

1. A pre-workshop survey: A few days prior to the workshop, a short and simple survey was sent to the participants to prepare the session.
2. A 90 minute workshop discussion on the pre-workshop survey and additional comments.

3.1.2 Results of workshop #1

We chose to distinguish the answers from academic and non academic participants in order to feel a difference in perception, if any. We summarised the discussion as follows:

Question 1: “What is your compelling reason (need/purpose) for increased cooperation between social scientists and Civil Society?”

- A. From academic participants: “The compelling reason is to produce relevant knowledge and make it immediately available for Civil Society.”

The proposed solutions are:

- To develop an attractive dialogue to increase the Civil Society engagement in research projects, both as participants as well as beneficiaries of the results.
- To co-develop innovative and purposeful research questions with Civil Society.
- To better share and communicate academic knowledge.
- To use technology that allows Academia and Civil Society to meet and communicate in understandable ways so that everyone would engage freely and easily. There is a lot of knowledge in Academia, but it is often poorly synthesized and communicated, and therefore not accessible to many people.

- Maintain a social network to share and test out ideas, allowing others to follow and engage.

B. From Civil Society participants: “The compelling reason is to address today's world problems with informed and integrated solutions. Without cooperation, solutions are independently thought out, created in silos and ultimately suboptimal”.

The proposed solution is:

- To increase cooperation between those who experience urgent problems in real life and Academia.

In summary, the main reason for increased cooperation between SSH and Civil Society — from both standpoints — is to release knowledge from silos in order to better match needs and resources and to get better informed and integrated solutions for both of them.

Question 2: “What is your proposed solution for improved cooperation between these stakeholders?”

A. From academic participants, the proposed solution is to find better ways for reciprocal communication: often people forget that existing knowledge is already there.

- A better dissemination of research through social media that is format friendly for non scientists e.g. informal interactions, mobile friendly-format.
- A system that helps with quick decision making thanks to reliable informed information. To enable large groups of people to make make informed decisions based on the reuse of knowledge.

B. From Civil Society participants, the proposed solution is to find ways for people to better trust each other in order to be able to work together.

- Being able to get reliable, credible, and trustworthy information.
- Finding ways to bring accountability online.

To summarise, the suggested solution to improve cooperation between SSH and Civil Society is to have a system which would offer trusted online relationships in order to provide a common ground that facilitates the communication and the sharing of information.

3.1.3 Output and recommendations for TRIPLE Task 5.3

Collaboration outreach has never been as important as it is now. Trust — or lack thereof — is a barrier to online cooperation. We need to find ways to secure trust in online relationships for the sharing of knowledge to flow and for people to collaborate together. We need to design a tool that is user-friendly, attractive to both SSH and Civil Society, and to a larger extent to all target groups of GoTriple. We need to find a way to enable trusted relationships in order to include Civil Society representatives in research projects, both as participants as well as beneficiaries of the results.

TABLE 6: Summary of recommendations (R.1) from Workshop #1.

1. Create a user-friendly system offering easy communication between SSH researchers and other stakeholders such as Policy Makers and Civil Society.
2. Develop a service that encourages informal interactions in order to enhance trust.
3. Make the system mobile-friendly.
4. Focus on existing trusted relationships and expand from there.

DRAFT

3.2 Workshop #2: Values & Principles of a Trust Building System

3.2.1 Context and objectives

On September 7 2020, MEOH ASBL organised the second TRIPLE T3.3 workshop on “Values & Principles” for a multistakeholder cooperation platform (i.e. a TBS). This second workshop took place within the *Knowledge infrastructures and digital governance* OPERAS event¹⁰, organised by the Centre for Contemporary and Digital History (CD2H) of the University of Luxembourg¹¹. While the hosting event was about how innovative models of governance could help knowledge infrastructures, the goal of this session was to ground the results of the first workshop into a common set of values that would contribute to the creation of a new scientific collaborative environment.

TABLE 7: Workshop #2 presentation.

Presentation webpage	https://www.c2dh.uni.lu/thinking/knowledge-infrastructures-and-digital-governance-workshop
Type of workshop	Transdisciplinary
Date	September 8, 2020
Length	45 min + informal side chats and a virtual meeting over a few weeks
Participants:	
- Number	5
- Gender	4 females, 1 male
- Age range	From 35 to 50 years old
Type of stakeholders represented	Librarians & Open repositories (2), SSH (2), Publisher (1)
Countries represented	Luxembourg (1), Germany (1), United States of America (3)

¹⁰ <https://www.c2dh.uni.lu/thinking/knowledge-infrastructures-and-digital-governance-workshop>

¹¹ <https://www.c2dh.uni.lu/>

Hosted by

Luxembourg Centre for Contemporary and Digital History(C²DH), University of Luxembourg¹²

The objective of the workshop was to identify the 5 preferred Values & Principles of a multistakeholder cooperation platform i.e. of the Trust Building System.

We planned to reach the objective of the workshop with:

1. A pre-session survey that was sent to all participants of the main event in order to generate discussion material.
2. The enrollment of motivated participants during the main event for a breakout room on their preferred values and principles that would underline multistakeholder cooperation.

3.2.2 Results of workshop #2

We circulated the survey to around fifty participants who were attending the OPERAS event. People were asked to select their five preferred Values and Principles that should underline a multistakeholder cooperation platform. Each of the Values and Principles was accompanied by a working definition in order to make sure that everyone shared the same understanding.

Out of twenty-four options, Trust (54,2%), Diversity (45,8%), Sustainability (45,8%), Accountability (37,5%), Inclusivity (33,3%) and Transparency (33,3%) emerged as the most desirable Values and Principles.

The accompanying definitions were:

- **Trust:** The belief that someone is good and honest and will not harm you, or that something is safe and reliable.
- **Diversity:** The fact of many different types of things or people being included in something; a range of different things or people.
- **Sustainability:** The quality of being able to continue over a period of time.
- **Accountability:** The fact of being responsible for what you do and able to give a satisfactory reason for it.

¹² <https://www.c2dh.uni.lu/thinking/knowledge-infrastructures-and-digital-governance-workshop>

- **Inclusivity:** The quality of trying to include many different types of people and treat them all fairly and equally.
- **Transparency:** As used in the humanities and in other social contexts, is operating in such a way that it is easy for others to see what actions are performed. Transparency implies openness, communication, and accountability.

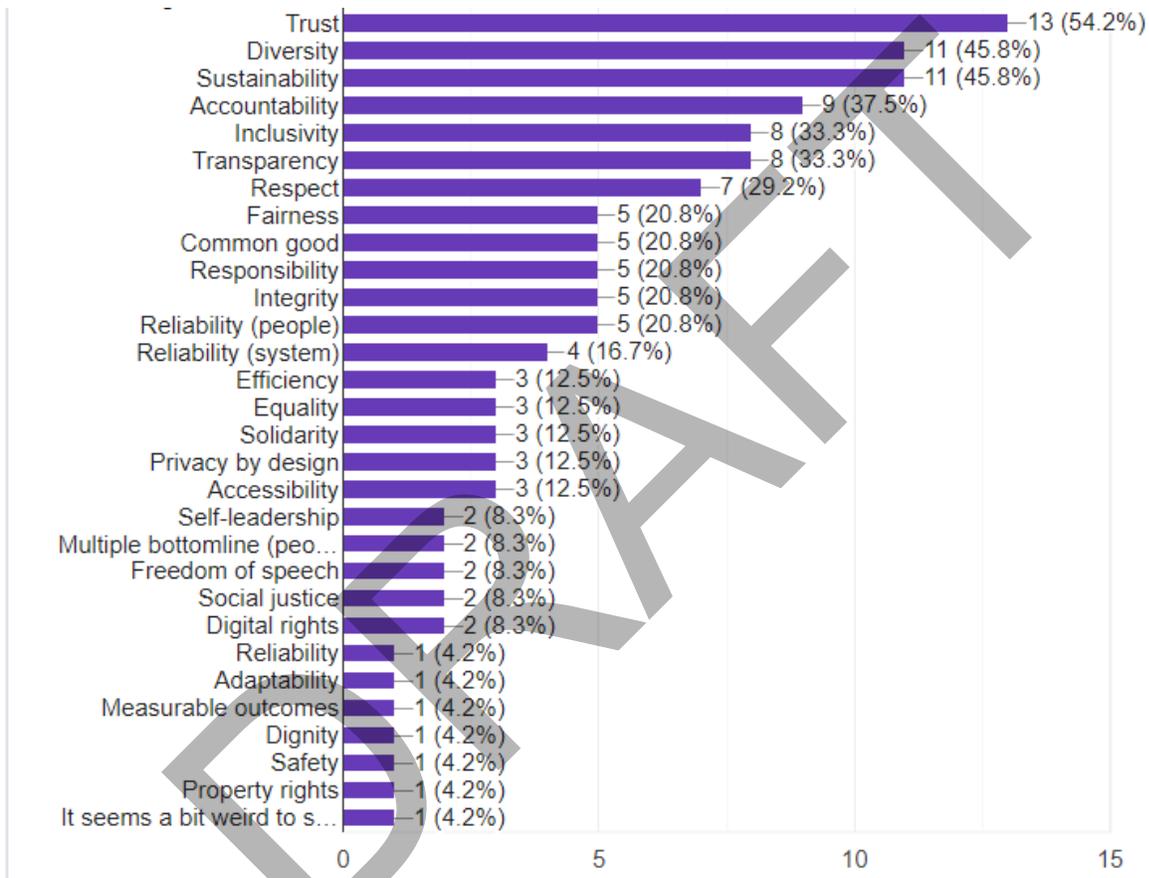


FIGURE 4: Results of the pre-workshop survey on preferred Values and Principles.

Meanwhile, we held a follow-up conversation through a Zoom meeting and group chats over a couple of weeks with the workshop attendees to discuss how those elicited Values and Principles could best be translated on the TBS. We chose six Values and Principles because the two last ones had an equal percentage of preference. We explained in more depth what the TBS and the TRIPLE project were in order to get targeted contributions from the participants.

The results of the conversation are:

- **Trust** could mean to limit the number of people on the Trust Building System, unlike other social networks where friends are not necessarily friends nor trusted contacts. It could also mean that the network is invite-only and that new introductions would be triangulated by trusted intermediaries. The Dunbar number¹³ suggests that the maximum number of people one can maintain stable social relationships with revolves around one hundred and fifty individuals. Therefore, the trusted network could be limited to one hundred and fifty people and therefore would need to be carefully curated.
- **Diversity** could mean to encourage people to prefer informal over formal communication and to facilitate the interaction of personal relationships and professional ones to help include people from various social, economic, and cultural backgrounds.
- **Sustainability** could mean creating governance mechanisms and Community Guidelines that reflect the core Values and Principles that will bind the users of the TBS. When everyone feels safe and secure, collaborations are more likely to be sustained with ethics and best practices in mind. Sustainability should also be reflected in the technological and energy consumption choices of the platform.
- **Accountability** could mean that if there is a limited number of people in everyone's network, there is less chance of encountering abusive users. Also, shared credibility might help make people accountable in a network promoting horizontal relationships.
- **Inclusivity** could mean a bit of the same as diversity, because interacting with people outside of the usual trusted network could help include people from various backgrounds. In the meantime, it could also be closely related to Sustainability because the Community Guidelines would ensure that everybody is welcome, without any discrimination. This would therefore help to offer new meetings and collaborations opportunities.
- **Transparency** could mean that while the TBS is built upon the principles of privacy-by-design, meaning that personal data is not mined or exploited by the system and that conversations and interactions are private by default, procedures and processes should remain transparent to the users of the system.

3.2.3 Output and recommendations for TRIPLE Task 5.3

TABLE 8: Summary of recommendations (R.2) from Workshop #2.

1. Reflect the values of Trust, Diversity, Sustainability, Accountability, Inclusivity, and Transparency in the design of the TBS.
2. Limit personal networks to one hundred and fifty participants.

¹³ https://en.wikipedia.org/wiki/Dunbar%27s_number

3. Curate the network with an invite-only system and with the triangulation of new introductions by trusted intermediaries.
4. Encourage users to engage in informal interactions.
5. Bind TBS users with Community Guidelines that reflect the core Values and Principles of the TBS.
6. Reflect sustainability in the technological and energy consumption choices of the platform.

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3.3 Workshop #3: “Trust Building System: Who is in the room?”

3.3.1 Context and objectives

On November 4 2020, MEOH ASBL organised the third TRIPLE T3.3. “TBS, Who is in the room?” workshop. The objective of the workshop was to identify the potential actors who might use the Trust Building System, via a “people map”, their needs, and appropriate feedback loops. It took place in the frame of the “Opening up Social Sciences and Humanities in Europe: From promises to reality”, OPERAS-P conference¹⁴. Participants to the OPERAS-P conference were invited to sign up for one out of three offered workshops. Eight participants registered for the workshop. Six participants attended the session and two sent their apologies.

TABLE 9: Workshop#3 presentation

Presentation webpage	https://www.operas2020.com/speakers-workshops
Type of workshop	Transdisciplinary
Date	4 November 2020
Length	90 minutes
Participants:	
- Number	6
- Gender	5 females, 1 male
- Age range	25 to 50 years old
Type of stakeholders represented	Public authority (1); SME (1); SSH (4)
Countries represented	Netherlands (1), Austria (1), Poland (1), Portugal (1), Germany (1), Serbia (1)
Hosted by	OPERAS-P conference https://www.operas2020.com/programme

¹⁴ <https://www.operas2020.com/speakers-workshops>

We planned to reach the objective of the workshop with:

1. A pre-workshop survey sent to the workshop participants, as well as to the participants of the main conference to increase the number of opinions
2. A 90 minute live virtual meeting

3.3.2 Results of workshop #3

Pre-workshop survey

We received thirteen answers to the survey.

Question 1: Professional background

When asked “What is your profession?”, a wide spectrum of professions were listed, ranging from academic positions to the public and the private sectors.

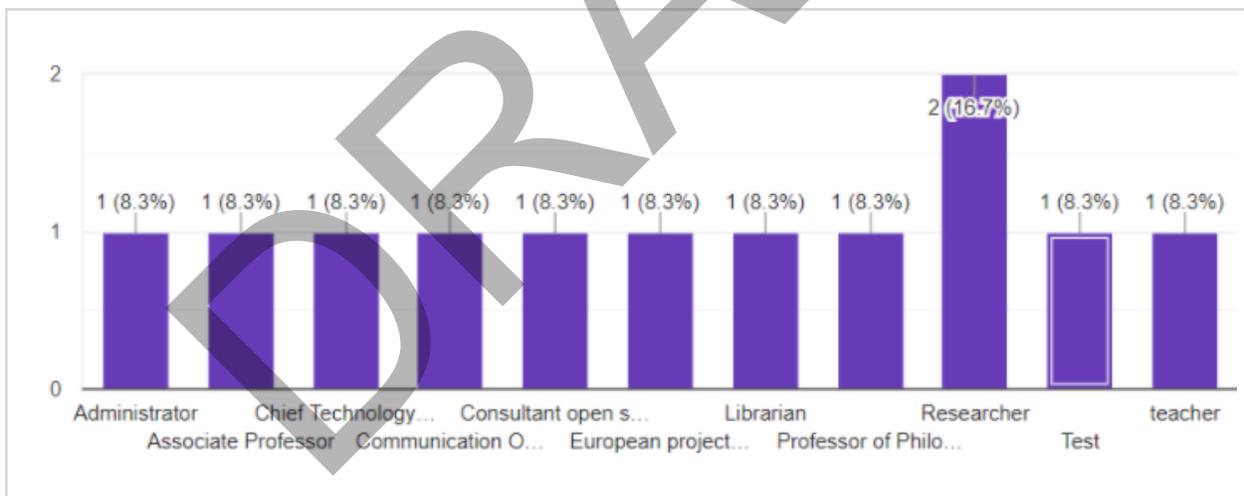


FIGURE 5: Professions of the TBS survey respondents.

Question 2: Multistakeholder engagement

When asked “How often do you need to engage in multistakeholder collaborations?”, participants said they engaged often or always (75%) with other stakeholders.

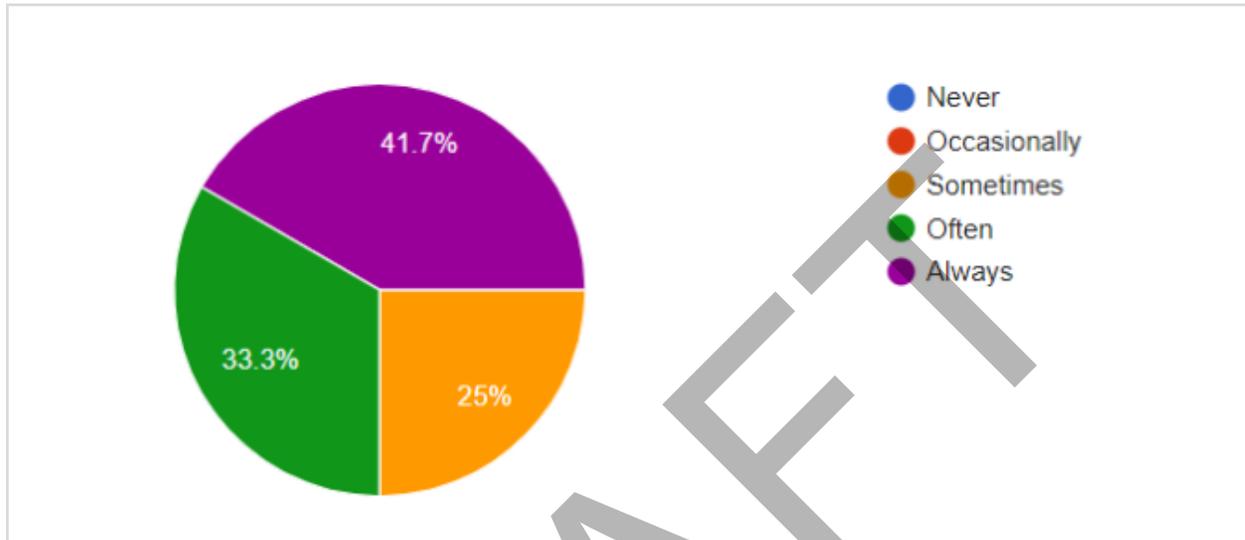


FIGURE 6: Multistakeholder collaboration engagement frequency.

Question 3: Needs

When asked “In which circumstances do you need to engage with other stakeholders?”, respondents answered that they need to:

1. access funding
2. reach out to other researchers
3. access specific expertise
4. ease impact assessment



FIGURE 7: Participants’ word cloud of needs when engaging with stakeholders.

Question 4: Interactions with in-group collaborators

When asked “With which type of stakeholders do you usually interact?” (those who can influence the ability to succeed; those interested by the results of your work; those who hold important information), participants responded:

1. Researchers
2. SSH researchers
3. SMEs
4. Publishers
5. Funders
6. Influencers
7. Policy Makers



FIGURE 8: Participants’ “in group” MAPS of interaction with key stakeholders.

Question 5: Interactions with out-group stakeholders

When asked “With what kind of stakeholder you would like to be working?”, participants responded:

1. Researchers
2. SSH researchers
3. Funders
4. Publishers
5. Policy Makers



FIGURE 9: Participants’ “out-group” MAPS of wished interaction with key stakeholders.

From the results from the figure 9 PEOPLE “in group” MAPS and from the figure 10 PEOPLE “out-group” MAP, we can see some potential synergies with participants having people and resources in their networks that other participants are interested in.

TABLE 10: Participants' Resources often match others' Needs.

PEOPLE “in-group” MAP = Resources	MATCHING	PEOPLE “out-group” MAP = Needs
Researchers	YES	Researchers
SSH researchers	YES	SSH researchers
Publishers	YES	Publishers

1. Make introductions to trusted contacts
2. Share expertise
3. Share knowledge
4. Share experiences



FIGURE 11: Word cloud: resources participants could benefit from others to solve their requests.

Workshop session

After analysing the survey results, we asked participants three questions at the live session:

Question 1: Optimising online interactions

The first question was “What would your ideal system be to optimise interactions with other stakeholders?”. Their suggestions were:

- Trust is a key factor in order to recommend contacts to each other. A kind of Trust Pilot¹⁵ process, which hosts reviews of businesses worldwide, to rate people’s trustworthiness could be an option. However, a tool or process, based on a community of practice where people are given responsibility and where their behaviour is being watched by others would be best.
- A real emotional bond is necessary to create trust. It could originate and be translated from real-life interactions or be built overtime via interactions in online chats.

¹⁵ <https://www.trustpilot.com/>

Question 2: Curating the system

The second question was “How would you curate the system, with human or algorithmic recommendations?”. Participants suggestions were:

- Create a human curated system because it offers more accuracy than algorithms which do not know the soft skills dimension of an individual.
- Make the system invitation-only, which would result in more effective network curation.
- Clearly communicate the added value and the unique selling point of the TBSs versus other messaging services and social platforms. At the same time it should be made obvious that the TBS is not a competitor but a complementary tool to other social media.
- Ensure that users can assess the quality/trustworthiness of people.
- Ensure that Special Interest Groups (SIGs) can be created.

Question 3: Feedback loops

The third and last question asked was “How would you reward helpful behaviours/people?”. Participants suggested that:

- Some sort of gamification could be a good idea.
- Awards would prove useful if they are hard to get— in order to give them value.

3.4.3 Output and recommendations for TRIPLE Task 5.3

TABLE 11: Summary of recommendations (R.3) from Workshop #3:

1. Create a newsfeed for people to display their requests and for others to help solve them.
2. Set up a process, based on a community of practice, where people’s behaviour could affect the reputation of their peers.
3. Provide sufficient information for users to assess the personality of their peers.
4. Offer social bridges to find reliable partners through human referral.
5. Enable the possibility to forward published requests to trusted contacts who could potentially help solve them because they would have the expertise or would know someone who would have the required expertise.
6. Create Special Interest Groups to form communities to discuss and share ideas.
7. Curate the network through private invitations.
8. Provide gamifications mechanics such as awards with a set of incentives to make them valuable.

3.4 Workshop #4: Cooperation profiles

3.4.1 Context and objectives

Following these three theoretical workshops which allowed us to grasp the essence of what a TBS could be through discussions around (a) the Needs & Purpose, (b) the Values & Principles, and (c) the Stakeholders and their preferred Feedback Loops, we decided to translate end-users' recommendations as mock-up designs.

We started off by designing cooperation profiles. A cooperation profile is meant to enhance basic user profiles with information that will better help TBS users connect to reliable partners. We also asked participants to provide us with information they would find meaningful in the frame of EU-funded projects. To do so, we looked at related outputs from the previous three workshops for inspiration:

- “How to be user friendly and attractive to those outside our usual social circles/discipline?” (R.1.1 - See page 97).
- “How to best convey a “human touch” to the user profile?” (Following R.3.4 - See page 97).
- “How to introduce trusted contacts to one another?” (Following R3.5 - See page 97).

In coordination with TRIPLE Task 5.3, we designed a basic user profile and presented it to participants for their feedback on how to tailor it to their needs.

TABLE 12: Workshop #4 presentation.

Presentation webpage	https://www.meoh.io/workshop-profiles
Type of workshop	Transdisciplinary
Date	April 23, 2021
Length	60 minutes
Participants:	
- Number	6
- Gender	5 females, 1 male
- Age range	25 to 45 years old

Type of stakeholders represented	National Contact Points (2); SSH researchers (2); Research Institute/SSH (1); Citizen (1)
Countries represented	Belgium (2), Romania (2), France (1), Germany (1)
Hosted by	MEOH ASBL, Online

The objective of the workshop was to co-design mockup TBS user cooperation profiles.

We planned to reach the objective of the workshop with:

1. A pre-workshop survey including some recommendations from previous workshops.
2. A live online chat to discuss the survey results and to define the fields that would populate the TBS cooperation profiles

3.4.2 Results of workshop #4

Eight people answered the survey, six of whom attended the workshop. The workshop consisted of debriefing and commenting on the survey results in order to co-design the cooperation profiles.

Question 1: Getting introduced to someone

The first section of the pre-workshop survey was dedicated to “Getting introduced to someone”, which is related directly to R.3.5 (See page 37) “How to introduce a trusted contact to another.” We asked participants “what single detail about the person or way of being introduced would make the difference for you to feel at ease and start a meaningful conversation?”.

Participants responded that a mutual contact could make the introduction with a quick word underlining the mutual context of work and reasons why there might be an opportunity for them to collaborate.

Question 2: Personal information

The second question was about “*which type of personal information do you feel comfortable being shared with a new potential partner in order to start a meaningful conversation.*”

Participants responded with the same kind of general information (e.g. name, contact details, interests, background information) that can be found on professional networks such as LinkedIn.

Results are shown in figure 13.

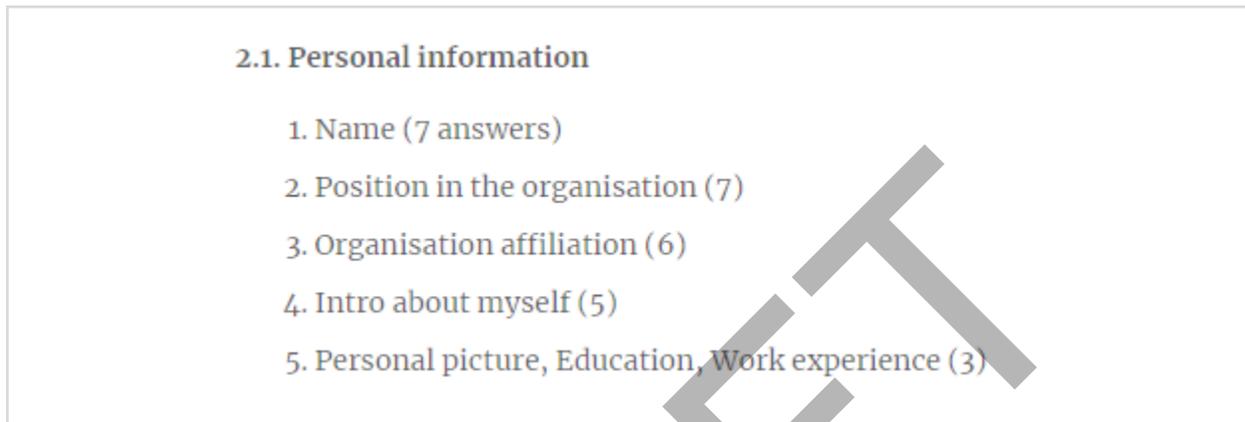


FIGURE 12: Essential information to be displayed on a cooperation profile.

Question 3: Cooperation information for EU projects

The next question was about the preferred cooperation information to be displayed in view of a potential collaboration within the frame of EU-funded projects. Results are shown in figure 14.



FIGURE 13: Preferred cooperation information in view of a potential collaboration within the frame of EU-funded projects.

Participants wished to complement this list with specific information on skills related to EU-funded projects such as a particular strength or experience (e.g. experience as coordinator of an EU project).

Question 4: Social impact indicators

We then asked about social impact indicators that could bring additional value to the Cooperation Profiles. Testimonials from past involvement in EU-funded projects and a success rate were suggested as the most relevant indicators.

Question 5: Informal information

Lastly, we asked participants about the preferred informal elements that could add a human feel to their profile. Participants suggested:

- Why I'm here
- Side projects I'm working on
- Stuff I'm interested in
- Ask me about this
- A quote that I like

Based on the workshop results, we drafted an updated version of the existing basic user profiles with participants' recommendations, bearing in mind that the technological, graphic, budgetary and user-friendly parameters would first need to be discussed with the Task 5.3 developers.

3.4.3 Output and recommendations for TRIPLE Task 5.3

TABLE 13: Summary of recommendations (R.4) from Workshop #4.

In black: pre-workshop draft

In blue: workshop recommendations for TRIPLE Task 5.3

1. My username
2. My location
 - a. City
 - b. Country
3. Work
 - a. Position
 - b. Organisation
 - c. My needs

- d. My expertise (e.g. communication skills)
 - e. Shared interest (Detected by Artificial Intelligence?)
 - f. Achievements/References to previous work/outcomes/project results/impact evaluation/testimonies (award page?)
 - a. EU projects related
 - i. Involvement in past/current/future EU projects
 - ii. Experience as EU project's participant or leader
 - iii. Experience as EU project's coordinator
 - iv. Resources to write a proposal or lead a WP
4. About me
- a. Professional mission & vision; Work style; Learning style
 - b. Current topic of interest / what the person is looking for
 - c. What do you like in life? What is your dream?
 - d. What is your most recent belief update? (something you used to think of in a way that has now changed/transitioned/evolved)
2. Why I'm here: tell others what drives you forward
- a. Shared values and work ethic, fair-play of the person
 - b. Side projects I'm working on
 - c. Stuff I'm interested in/I would like to learn about
3. Education
- a. Field of study
 - b. Degree
 - c. School
4. Social
- a. Website
 - b. Social profile

3.5 Workshop #5: Community Guidelines

3.5.1 Context and objectives

After the first practical workshop based on mock-ups to define the ideal cooperation profile for TBS users, we took advantage of the OPERAS-GER national node event¹⁶ to devise the Community Guidelines of the TBS following recommendation R.2.6 (See page 91). In October 2021, T.3.5 will start to design the GoTriple Community Guidelines. The TBS Community Guidelines should help inform the GoTriple ones, while making sure that both are aligned.

TABLE 14: Workshop #5 presentation.

Presentation webpage	https://www.meoh.io/workshop-guidelines
Type of workshop	Multidisciplinary
Date	April 26, 2021
Length	90 minutes
Participants:	
- Number	4
- Gender	2 females, 2 males
- Age range	25 to 50
Type of stakeholders represented	SSH (4)
Countries represented	France (1), Italy (1), Germany (2)
Hosted by	OPERAS-GER national node event https://operas-ger.hypotheses.org/veranstaltungen/national-node-event#Workshop2

The objective of the workshop was to co-design the TBS's Community Guidelines, the principles that users agree to abide by when using the TBS, by assessing, challenging, and improving a draft version of the TBS's Community Guidelines.

¹⁶ <https://operas-ger.hypotheses.org/veranstaltungen/national-node-event#Workshop2>

The main objectives of these Community Guidelines are:

- to keep users safe
- to make sure rules are clear
- to make sanctions justified and easily explainable

We planned to reach the objective of the workshop by preparing an initial draft of the TBS Community Guidelines. Co-designing these Community Guidelines from scratch would have taken more time than allowed by a 90 minutes workshop. To prepare the draft, we looked for best practices^{17 18} and examples¹⁹ in the industry. We also looked at existing Community Guidelines, both from the Open Science arena^{20 21 22 23 24} and from well known social media.^{25 26}
²⁷

From those examples, recurring best practices when it comes to designing Community Guidelines are:

- An introductory paragraph stating the purpose of the community in order to set the tone and to convey a sense of welcoming and interacting without appearing being punitive or scary.
- The style of the Community Guidelines is best to differ from legal and tedious Terms of Services. Community Guidelines must use unambiguous wording, avoid jargon and legalese.
- Community Guidelines must be very easy to locate.

The goal is to get TBS users to actually read guidelines that are easily digestible. Snappy subheadings can help. Bullet points too. We then submitted those draft Community Guidelines to the participants for review and comments. Finally, we used the results of the pre-survey workshop to kickstart the conversation and challenge the initial set of Community Guidelines at the workshop.

¹⁷ <https://blog.vanillaforums.com/how-to-write-community-guidelines>

¹⁸ <https://www.communitysignal.com/the-application-of-community-guidelines/>

¹⁹ <https://www.webpurify.com/blog/community-guidelines-best-practices-examples/>

²⁰ Humanities Common, <https://hcommons.org/guidelines/>

²¹ Researchgate.net, <https://www.researchgate.net/community-guidelines>

²² ScienceOpen, <https://cutt.ly/AQd27Qa> & <https://about.scienceopen.com/privacy-policy/>

²³ mendeley, <https://www.mendeley.com/terms/>

²⁴ Jstor, <https://about.jstor.org/terms/>

²⁵ WhatsApp, <https://cutt.ly/eQd9b4R>

²⁶ WhatsApp group rules, <https://youyaa.com/whatsapp-group-rules/>

²⁷ Lunchclub, <https://cutt.ly/vQd9E9y>

3.5.2 Results of workshop #5

At first, we debriefed the pre-workshop survey. Participants said they rather enjoyed reading the draft initial Community Guidelines and that the length was appropriate (66.7% of respondents in both cases). They also said that the introductory paragraph managed to state a clear purpose for the TBS community while conveying a sense of welcoming and interacting (100%). Similarly, participants said the wording was clear and unambiguous (100%), and that no jargon or legalese had to be removed. They stated that the Community Guidelines were appealing to read (83.3% in both cases). Finally, we asked where users would expect to find the Community Guidelines, and despite not having seen the Trust Building System, their answer was: as a pop-up for new users, or as a menu item, or next to the User Terms, or easily accessible.

Second, we divided the Community Guidelines into three sections and formed three teams of two participants each including the two moderators. Each of the three teams was assigned one of the three sections to work on, trying to improve them in dedicated break-out rooms. Then, each team changed sections and had to review the suggestions and comments made by the previous team. Finally, we discussed altogether the comments made, resolving and accepting them upon consent. We ended up with an upgraded version of the pre-workshop draft Community Guidelines version.

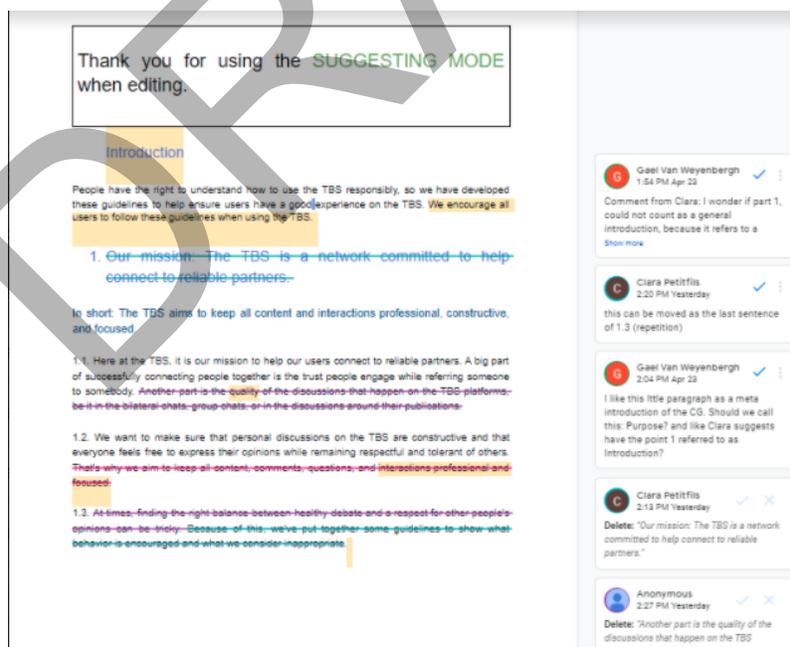


FIGURE 14: Commented version of the Community Guidelines during the workshop.

3.5.3 Output and Actionable Outcome for TRIPLE Task 5.3

TBS Community Guidelines v1.0:

- 1.** Our mission: Our platform is a network committed to help users connect to reliable partners.

In short: Our platform aims to keep all content and interactions professional, constructive, and focused.

- 1.1.** People have the right to understand how to use our platform responsibly, so we have developed these guidelines to help ensure that users have a good experience on the platform. We encourage all users to follow these guidelines when using the platform.

- 1.2.** It is our mission to help our users connect to reliable partners. A big part of successfully connecting people together is the trust people engage while referring someone to somebody.

- 1.3.** We want to make sure that personal discussions on the platform are constructive and that everyone feels free to express their opinions while remaining respectful and tolerant of others.

- 2.** Your personal information.

In short: Be genuine and accurate.

- 2.1.** We encourage our members to use accurate information about themselves. Please do not provide misleading information about your qualifications or work experience, affiliations, or achievements on the platform. You risk losing credibility and negatively impacting the reputation of those who committed their credibility to endorse you.

- 2.2.** While the platform does not maintain a “real name” policy, as a professional oriented network, we ask that your account be associated with your true identity for professional and/or research purposes. Entities such as projects, communities, or organizations are to be represented by a real person.

- 2.3.** We reserve the right to suspend accounts that are not associated with real individuals and real identities, in line with what is described in 2.1 and 2.2.

- 3.** Interacting with other users.

In short: Stay respectful of others and acknowledge diversity.

3.1. Each of our users plays a role in establishing and promoting a positive, inclusive, and encouraging community. Discussions, publications, actions, or comments that promote hatred of any kind are not acceptable through communication on the platform. Members who engage in this kind of behavior expose themselves to be banned either temporarily or permanently from the platform. In the platform User Terms, we explain in more detail your responsibilities when you have an account on our platform, when you post something on your profile, and when you interact with other members.

3.2. The members of our platform engage on the platform to connect and engage with reliable partners. A recommended partner might not always be the right match. We believe that disagreements and healthy debate can lead to great progress. To facilitate these important conversations, we ask that our members respect each other's ideas and acknowledge the diversity of thought and opinion.

3.3. Harassment, defamatory and derogatory comments, explicit comments and content, and hate speech will not be tolerated. This includes personal attacks and attacks on other people based on their:

- Race, ethnicity or national origin
- Political or religious affiliation
- Sexual orientation, gender or gender identity
- Age, serious disease, or disability

3.4. This can be a delicate balancing act, but here intention is key; if the primary purpose is to attack, the content crosses the line.

3.5. Please note: members who repeatedly engage in disrespectful behavior risk having their content reported, deleted, and their membership disabled.

4. Best practices

In short: The following best practices outline our expectations for appropriate online behavior for all users.

4.1. What to do:

- Be courteous and respectful. Respect one another's privacy and intellectual property.
- Stay on topic. Limit all discussions to professionally relevant topics.

- Respect people's choices: If you add someone to a group and they remove themselves, please honor that decision.
- Try not to use jargon to ease mutual understanding and improve chances of cooperation.
- Treat TBS introductions like you would treat introductions from a friend or a trusted colleague. Respond in a timely manner to the introduction message, and communicate in a friendly and professional way.

4.2. What not to do:

- Violate our Terms of Service: As a reminder, the Terms of Service define your contractual relationship with our platform and the Terms of Service take precedence to the extent there is any conflict with this document.
- Do not post inflammatory, derogatory, or otherwise inappropriate comments about other users (see section 3).
- Do not promote, condone, or encourage illegal activity in your postings.

5. Inappropriate content and behaviours

In short: Our platform's support team takes every report of hatred, violence, and harassment seriously. We encourage everyone to act and interact responsibly.

5.1. We prioritize working with those affected by inappropriate content to determine what the next steps should be — the safety of our users is of utmost importance. If you have been subject to any of the inappropriate behaviours or content suggested at the above point 3 "Interacting with other users" please refer to [URL link to be inserted] for in-depth guidelines on how to report content or people.

5.2. Our support team will review reported content, remove it if necessary, and take further action if needed. Users found to have broken our platform Terms of Services, Privacy Policy, and/or Community Guidelines might be banned temporarily or indefinitely from the platform.

FIGURE 15: TBS Community Guidelines - workshop output.

3.6 Workshop #6: Posting needs and requests

3.6.1 Context and objectives

We invited workshop participants to test out the TRL6²⁸ prototype of the TBS on their mobile devices. We decided to have participants test out this prototype in order for us to confront our interfaces with real life use cases. We assumed that — at this stage — it was the best way to gather the most valuable feedback on features and specific usages of the TBS.

To do so, we decided to organise an onboarding session in order to introduce the TBS prototype to the workshop participants, to explain to them its basics, its limitations as a prototype, and what we were expecting from them during the workshop. Then participants were asked to post at least one request, and to help others solve their own requests, over a period of one week running from June 14 to 21, 2021.

After a full week of testing, participants were asked to fill in a feedback form. We then gathered again in an online debriefing session to discuss which functionalities were satisfactory and which ones should be improved.

TABLE 15: Workshop #6 presentation.

Presentation webpage	https://www.meoh.io/workshop-publications
Type of workshop	Transdisciplinary
Date	June 14 - 21, 2021
Length	30 minutes Onboarding session + 7 days of prototype testing + 30 minutes of Debriefing session
Participants:	
- Number	8
- Gender	3 females, 5 males
- Age range	From 25 to 65 years old
Type of stakeholders represented	Policy Maker (1); SHH (7)

²⁸Technology Readiness Level <https://cutt.ly/dQMTOzj>

Countries represented	Italy (3); Poland (2); France (2); India (1)
Hosted by	MEOH ASBL, Virtual event

The objective of the workshop was to co-design the posting process of publications on the TBS. This posting process is meant to offer an easy and intuitive way for users to share their activity, needs, and requests.

We planned to reach the objectives of the workshop with:

- An onboarding session of 30 minutes for participants to get to know each other and for us to lay down the workshop’s intention, desired output, and rules. We proposed to work on the assumption elicited in R.3.1 that people have unmet needs and open requests that, if solved, can help them reach their next professional step²⁹.
- A week for testing the process of “Posting your needs and requests.”
- A feedback form prior to the debriefing session.
- A virtual debriefing session of 30 minutes.

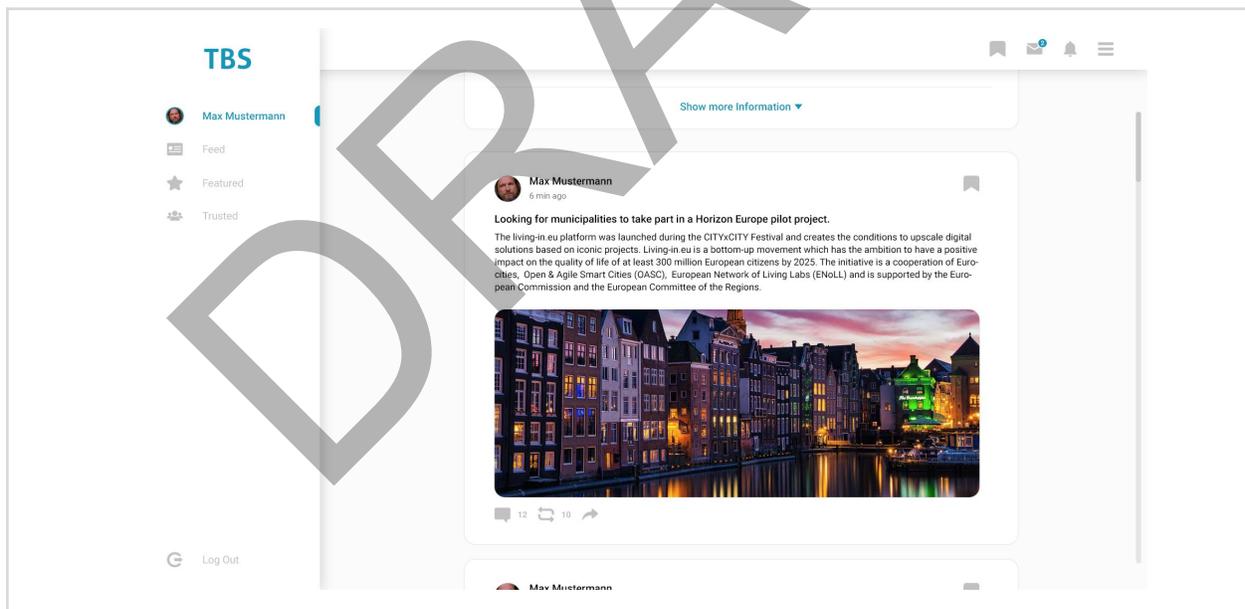


FIGURE 16: mock up of the TBS prototype “Posting your needs and requests page.”

²⁹ When we asked random participants in workshop #3 to state such needs, other group members were often able to recommend someone trustworthy who could fulfill those needs. Thus, the workshop #6 was about to test out this idea that SSH researchers are literally one handshake away from a quick and effective solution to their unmet needs.

3.6.2 Results of the workshop #6

During the week of testing, each participant posted at least one request to their profiles. From the 12 requests posted:

- 9 were resolved (75%),
- 2 were partially resolved (17%),
- 1 was not resolved (8%).

TABLE 16: Examples of requests (titles and details) being posted and their status on the TBS.

Titles	Details	Status
1. Interested in reviewers of research software	Launch of a new journal that focuses on reviewing research software and data services as an intellectual product with on art history, archeology, music studies and performing arts.	RESOLVED
2. We offer topics for thesis in Digital humanities/art history: Master; Bachelor, PhD	We offer a research library and a lively community of researchers, fellows and assistants	RESOLVED
3. Text spoken in an audio message, and introducing a series of written requests on the quality of GoTriple's dataset enrichments.	3.1 Is the difference of enrichment quality an issue from the user's perspective?	RESOLVED
It is one of GoTriple's key assets to allow for searching both publications and datasets in a single interface.	3.2. Should the search interface make visible the difference between the two types of enrichments?	RESOLVED
When the full text is not available, only limited metadata can be analyzed (title, abstract, keywords).	3.3 Should the results be ranked according to the (estimated) quality of the enrichment (based on the full text or on the metadata)?	RESOLVED
	3.4 Should the type of enrichment become a search filter (on full text/on metadata) or only be clearly stated somewhere?	RESOLVED
	3.5 Which strategies could be used to minimize the discrepancy?	RESOLVED
	3.6 GoTriple will list publications together with datasets, but it will be possible to filter them by type. Is the filter a sufficient and satisfying solution to distinguish both types?	RESOLVED

	3.7 Should each resource’s summary clearly indicate the type of enrichment (“enrichment based on...” full text, metadata, etc.)?	RESOLVED
	3.8 Should the publications and the datasets be separated in distinct search interfaces or only in the results (“type” filter)?	UNRESOLVED
4. Literary bibliographies in various languages	Looking for open literary bibliographies in various national languages.	UNKNOWN
5. Help for the first TRIPLE hackathon needed	Task 8.3 would like to disseminate the subject of the hackathon event among the TRIPLE partners, which focuses on data reconciliation.	UNKNOWN

Following the week of testing the process of “Posting your needs and requests”, participants had to fill out a feedback form and were invited to a debriefing session of 30 minutes on June 21, 2021.

In the feedback form, we first asked participants “what kind of need or request would you rather post?” The survey showed that most would rather be able to post both specific requests for their projects and general announcements for their research/activity.

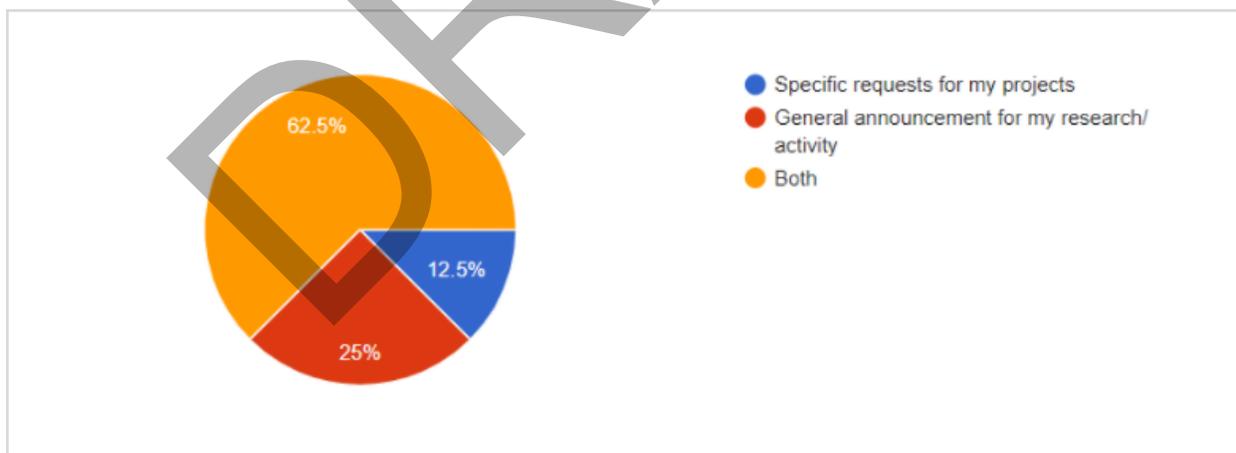


FIGURE 17: “What kind of need or request would I rather post?”

Then, we asked participants “Where would you rather post your needs and requests?”. Among the proposed options (a) Post to profile, (b) Post to chat, (c) Post to community (SIG), participants preferred to post their requests either on their profile to the attention of their own trusted circles (37.5%), or within a specific community or SIG (25%). 37.5% of them checked all

of the proposed options. At the debriefing session, participants said that the priority would be for the request to be visible. Considering this, the creation of a newsfeed would be appropriate in order to gather all requests in one place, instead of them being scattered among different profiles and communities. The ability to forward a publication as a direct message (DM) in a private chat was recognized as being valuable.

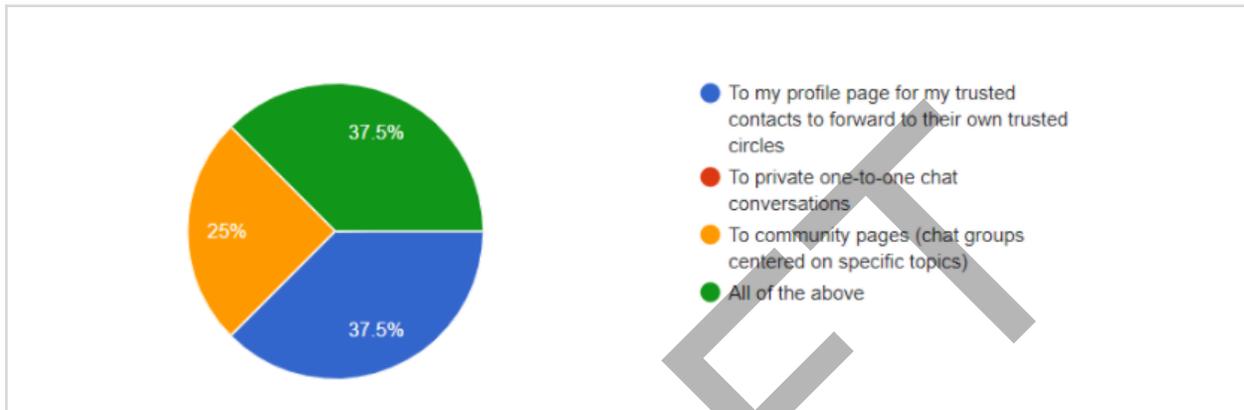


FIGURE 18: “Where would I rather post my publications?”

As a third question, we asked participants whether “posting an audio message” would be useful. It was said that audio messages would be less intrusive than video recording (50%) while being more convenient than tapping text on mobile devices (25%). Participants showed little interest in using audio recording to better contextualize their request, or to better convey emotions and thus to help better promote their request (12.5%).

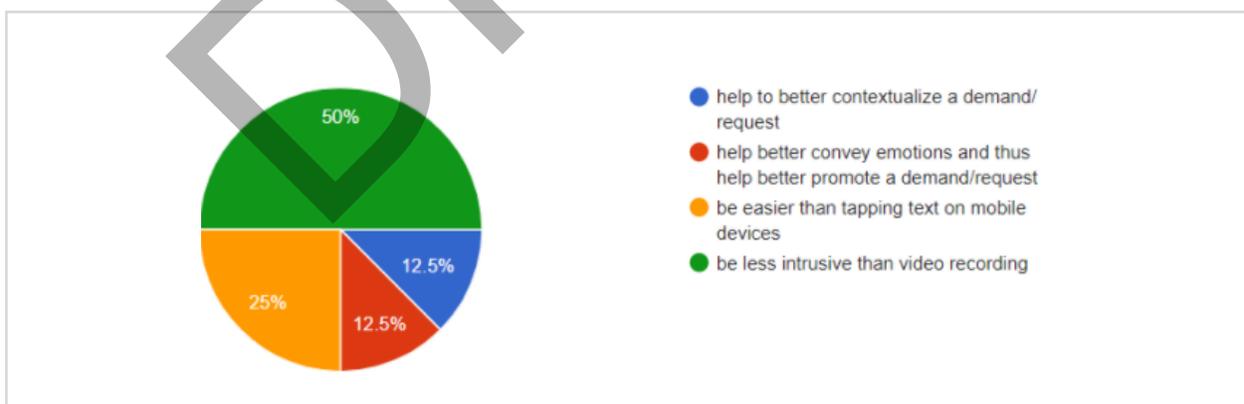


FIGURE 19: “Posting audio messages.”

The next question confirmed the little interest for audio messaging, with text description being the preferred option by a large extent (87.5%).

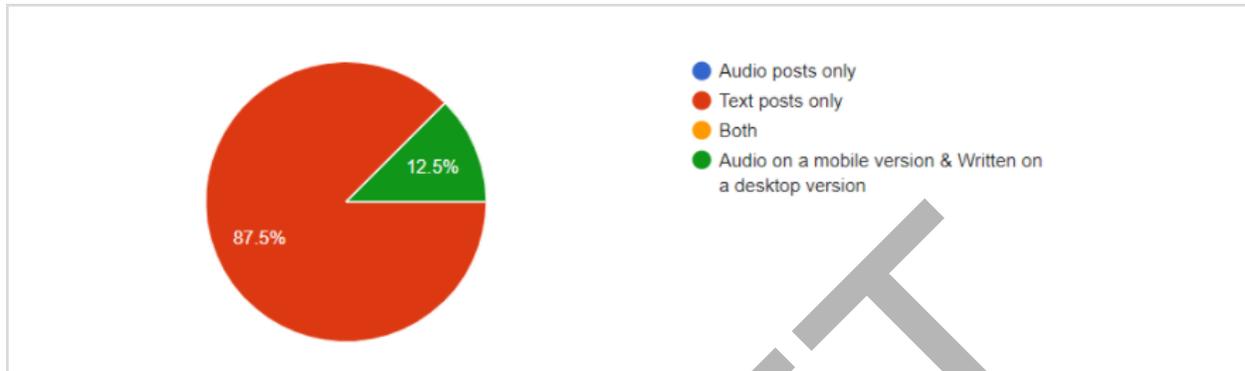


FIGURE 20: “Where would you rather publish your request?”

Then, we asked participants “How intuitive did they find the user journey?”. 87.5% of them said it was Ok at this stage of development. Other values are: neutral (62.5%), good (12.5%), and very good (12.5%).

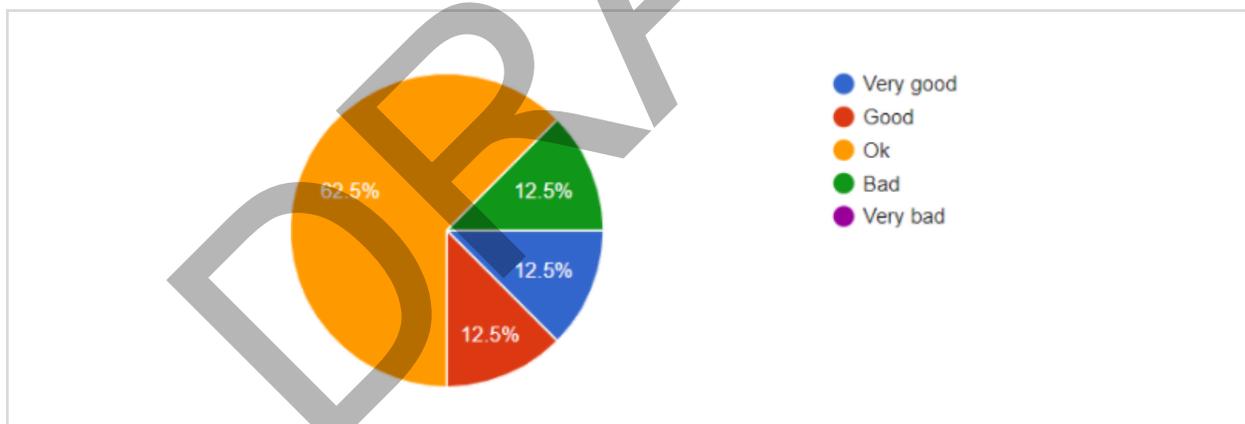


FIGURE 21 “How intuitive did you find the TBS user journey?”

Finally, we asked participants what functionality they would like to see be improved. Participants suggested to:

- Add embedded support to improve the user experience.
- Display the network’s activity in a newsfeed instead of having to browse everyone’s profile page to see their respective publications.

3.6.3 Output and recommendations for TRIPLE Task 5.3

TABLE 17: Summary of recommendations (R.6) from Workshop #6.

1. Create a newsfeed showing the activity of the trusted network.
2. Remove the audio-messaging functionality in the desktop version of the system.
3. Embed customer support e.g. videos explaining the user journey, features, or a chat bot.
4. Make sure that the system gains stability.
5. Focus on the Trusted Network and on the newsfeed for a greater user experience.
6. Test the TBS over a longer period of time.

DRAFT

3.7 Workshop #7: The newsfeed

3.7.1 Context and objectives

At this second hands-on workshop on the TBS prototype and following the Recommendation 6.1 from the previous workshop, a newsfeed was integrated into the prototype and was the main subject of this dedicated workshop.

The process of this workshop is the same as the previous one (#6)—with an onboarding session, a few days to test out the newsfeed page and to help other workshop members resolve their requests, and with a virtual debriefing session. We decided to shorten the length of this workshop to see if a reduced timeframe would convey a sense of “hackathon” and lead to an increased engagement from participants.

TABLE 18: Workshop #7 presentation

Presentation webpage	https://www.meoh.io/workshop-newsfeed
Type of workshop	Transdisciplinary
Date	July 9 - 12, 2021
Length	30 minutes Onboarding session + 1 day of testing + 30 minutes of a debriefing session
Participants:	
- Number	6
- Gender	3 females, 3 males
- Age range	From 25 to 55 years old
Type of stakeholders represented	SSH (4); SME (1); NCP (1)
Countries represented	Portugal (1); France (1); Belgium (1); Luxembourg (1); United Kingdom (1), Switzerland (1).
Hosted by	MEOH ASBL; Virtual event

The objective of the workshop was to co-design the newsfeed of the TBS by integrating end-user feedback from real case scenarios. The newsfeed is meant to show publications from trusted contacts and their peers.

We planned to reach the objective of the workshop with:

- An onboarding session of 30 minutes for participants to meet up and for us to lay down the workshop's intention, desired output, and rules.
- A one day for testing the “newsfeed” page.
- A feedback form prior to the debriefing session.
- A debriefing session of 30 minutes.

3.7.2 Results of workshop #7

During the testing period, participants posted at least one request to their profiles. In total, three requests were posted, one was solved (33%), one was on the way to being resolved (33%), and one was unknown (33%). The ratio of engagement compared to the previous workshop was higher: three requests in one day = 3 requests per day; against twelve requests in seven days = 0,58 requests per day. Under similar workshop conditions, a shorter time frame might be more efficient than a longer one.

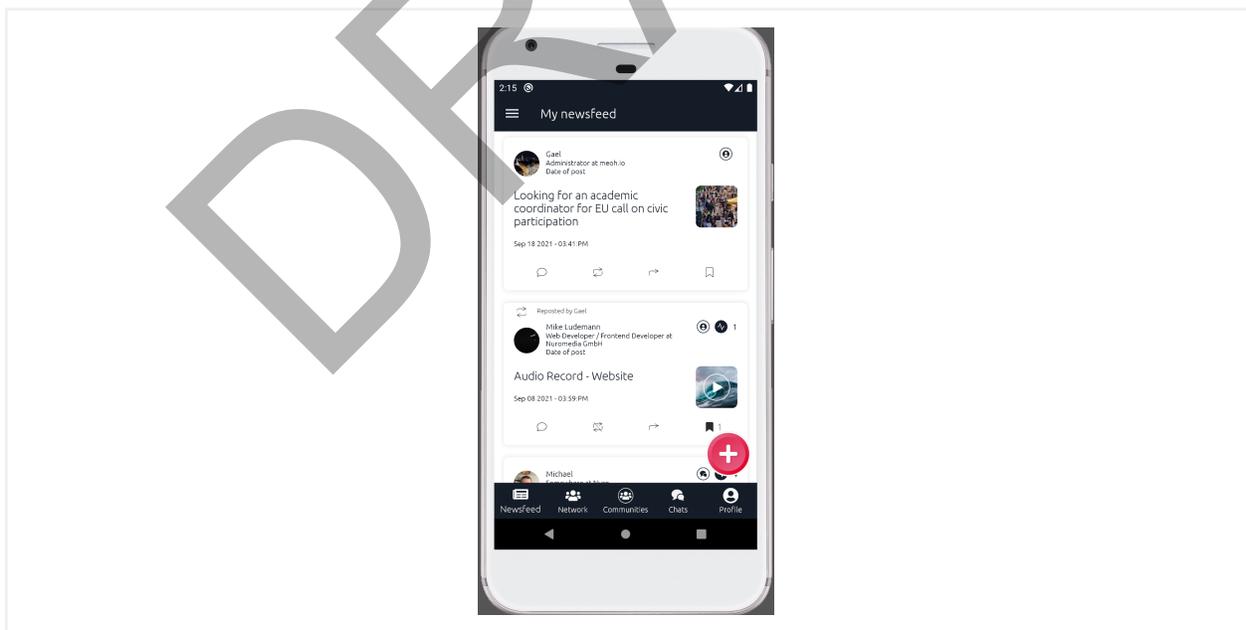


FIGURE 22: Example of a newsfeed page in the TBS prototype (mobile version).

TABLE 19: Examples of requests being posted and resolved on the TBS newsfeed

Title	Details	Status
Help with supporting Social innovators	Hello everybody! I am looking for colleagues with experience in guiding startups to investment who can share their views practically with a group of social innovators looking to build investable ventures. Beyond this, anyone with insights they can share on finding and getting funding, connecting with useful other ecosystems, research and knowledge teams etc. will be much appreciated. The plan is to invite you to a panel discussion in August targeted at social innovators working on Africa focussed projects from all over the world	UNKNOWN. Two contacts offered to introduce the participant to two other trusted contacts. However we do not know the final output of that request.
67th rencontre assyriologique internationale	The annual conference of the International Association for Assyriology (IAA), which will be hosted by the University of Turin from July 12 to July 16 2021. Looking for participants	UNKNOWN. We do not know if the need has been met or not. All we know is that it got reposted three times and got one comment stating interest.
Looking for academic readings on user engagement	I'm looking for any relevant reading on user engagement strategy in the light of digital tools and SSH research	RESOLVED. A direct trusted contact offered to help.

Following the day of testing the “newsfeed” page, participants had to fill in a feedback form and were invited to a debriefing session of 30 minutes on July 12, 2021. At the debriefing session, we listened to the feedback from participants, both in writing through the dedicated form and through a live discussion.

For questions 1.1 and 1.2, “Did you enjoy using the prototype and clearly understand its purpose to connect to reliable partners and to support each other?”, participants responded that they enjoyed it (100%) and rather understood its purpose (80%), though the function on how and where to connect could be further improved.

For question 1.3, if the “TBS helped them solve their request”, the majority said yes (60%). Participants explained that a few weeks would be needed to know for sure if some of the requests have been successfully resolved.

For question 1.4, “Describe a situation in which the TBS is most useful”, participants responded “to connect researchers, create groups of interests and networks of knowledge.” Participants complemented by saying that from a Unique Selling Proposition (USP) perspective, the TBS is different from LinkedIn in the sense that - on the TBS - being part of a community means that you are part of a network that trusts you and knows your expertise. It implies that posted requests might be seen by less people but by the right people.

For question 1.5, “What specific goal did it help you achieve?”, participants said that it helped them connect with trusted people, and especially for the purpose of connecting resources to specific needs.

For question 2.1, 100% of participants said it was easy to use the newsfeed and to interact with others on their publications (comment, repost, forward, award).

For question 2.2, when asked “How to improve the newsfeed?”, participants said that the newsfeed could be the default page of the TBS instead of the current “My network” page. It was suggested that users should be able to edit comments made on publications, as well as to improve the visibility of the “comment, forward, repost, bookmark” icons.

For question 2.3, “The newsfeed shows publications from your network, but also from the featured contacts of your network: is it clearly understood? Alternatively, how would you communicate this?”, participants were divided (50% of yes), and were not sure whether one could see posts from people that are not part of their network.

For question 2.4, “Would you change anything in the graphic design of the newsfeed page?” participants said that the graphic design was nice, though perhaps the most active posts with recent comments could be placed up first at the top of the list for easier identification.

For question 3.1, “Would you change anything in the “Plus” button (Post, Invite, Create community), is it clear enough?”, participants said that it is fine; however, a short tutorial to better explain each functionality could help so as not to lose the less patient users. During this session, the in-app chat functionality gained in popularity and it was suggested that the chat be inserted in the “Plus” button along other main TBS functionalities.

For question 3.2, “What functionalities do you prefer in the TBS app prototype?”, participants responded that the networking function together with the possibility to create communities of interests or Special Interest Groups (SIGs), the chat, the newsfeed, and the ability to post requests within a given community, as well as the award system were most interesting.

For question 3.3, “Are there any functionalities you would like us to add?”, participants would like to have the option of doing video calls and to see some more professional and informal information from people who are not yet in their trusted network.

For question 3.4, “Are there any functionalities which seem useless to you?”, participants suggested making the newsfeed the new landing page instead of the My Network one.

For question 3.5, “Should a functionality be given more visibility?”, participants responded again that the newsfeed should be given more visibility by becoming the new landing page.

For question 3.6, “How useful do you find the Mutual Contacts function?”, 80% of participants found it useful or very useful.

For question 3.7, “How would you improve it?”, participants suggested having the possibility to import contacts from other social media contacts, e.g. LinkedIn, to invite to the TBS, as well as to indicate the amount of mutual contacts between them and somebody else.

For question 3.8, “How useful do you find the “Introduce” functionality?”, 80% of participants responded that it was useful or very useful.

For question 3.9, “How would you improve the “Introduce” functionality?”, participants responded that if one is already trying to introduce people who are already connected to each other, this should trigger a system alert.

For question 3.10, “What is the best way to connect to one another on the TBS?”, the “Invite” button, the “Introduce” button, and the “Add me to your network” functionality from the community menu are seen as most desirable. Importing contacts from Operas, EGI, or LinkedIn were perceived as “crowd importing” that dilute the essence of the TBS. However, because the TBS is limited to 144 people, one would need to carefully choose which ones to add to their personal network.

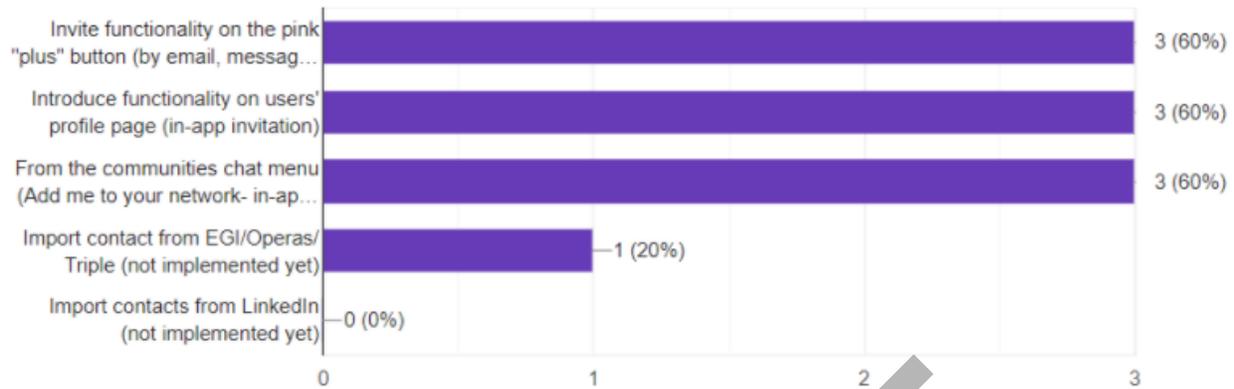


FIGURE 23: "What is the best way to connect on the TBS?"

For question 3.11 "Do you have any additional comments", participants suggested the possibility to send emails from the TBS e.g. in order to send some documents.

3.7.3 Output and recommendations for TRIPLE Task 5.3

TABLE 20: Summary of recommendations (R.7) from Workshop #7.

1. Make the newsfeed the default landing page.
2. Enable comments editing and improve the visibility of the "comment, forward, repost, and bookmark" icons.
3. Place newest activities on top of the newsfeed stream.
4. Provide tutorials to explain functionalities e.g. short explanatory videos.
5. Insert the Chat in the main "Plus" button.
6. Enable video calls.
7. Provide additional information on people who are not yet in one's network to add some human touch and to better grasp those populating the networks of their trusted peers.
8. Import contacts from other social media accounts.
9. Indicate the amount of mutual contacts between users.
10. Trigger a system alert if users try to introduce people who are already connected with each other.

3.8 TBS INTEGRATION IN GOTRIPLE WORKSHOP

3.8.1 Context and objectives

Following a number of internal discussions in collaboration with Task 5.3, we decided to ask a few external participants how they would best see the integration of the TBS on GoTriple, in order to challenge or confirm the assumptions made to ensure that the TBS is well integrated from an end-user perspective. We showed them some mockups of the GoTriple interface, as well as some mockups from the TBS.

TABLE 21: Workshop #8 presentation.

Presentation webpage	Not applicable
Type of workshop	Single disciplinary
Date	15.07.2021
Length	45 minutes
Participants:	
- Number	5
- Gender	3 females, 2 males
- Age range	From 30 to 40 years old
Type of stakeholders represented	SSH
Countries represented	France (2), United States of America, Colombia, Denmark
Hosted by	MEOH ASBL, Virtual event

The objective of the workshop was to discuss with the users the best way to integrate the TBS in the GoTriple interface.

We planned to reach the objective of the workshop by showing mock-ups of both the GoTriple Platform and of the TBS while explaining the context and potential user stories, and discussing options.

3.8.2 Results of the workshop #8

Bearing in mind the Recommendation R.0.16 to keep GoTriple and TBS pages clean and free from cluttered information, participants suggested to place the TBS symbol as shown in the below figure 26.

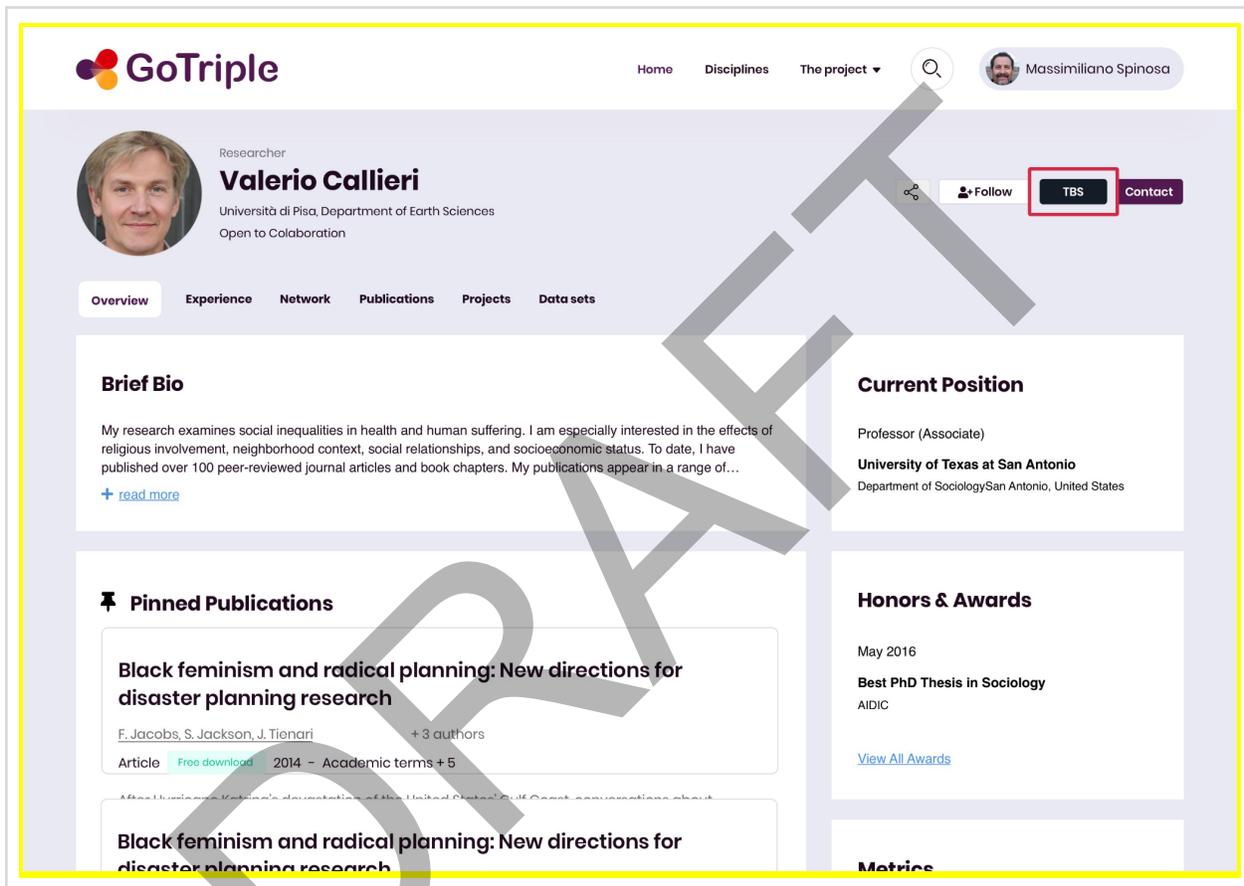


FIGURE 24: Suggested integration of the TBS in MyGoTriple User Profile (see the red box highlight).

We asked participants five questions to better understand concretely how the TBS should be integrated in GoTriple, and where it should appear physically.

Workshop #8 questions and answers:

Question 1: “Where should we integrate the TBS in the GoTriple interface?”

Participants saw the entire GoTriple mockup³⁰, and concluded that the TBS should appear on the following GoTriple pages:

- GoTriple home page, including TBS metrics
- GoTriple user notifications stream, including TBS notifications
- GoTriple registered user profile page, including a TBS Network tab
- GoTriple registered user profile/personal information, including a Connect your existing MEOH account to GoTriple services, and Connect to Trust Building System.

Question 2: “What single TBS metric should appear on the GoTriple home page?”

- The total number of TBS users

Question 3: “What notifications should appear on the GoTriple user notifications stream?”

- You received an invitation
- Your invitation has been accepted
- Your publication has been commented
- Your publication has been reposted
- Your publication has been forwarded
- Your publication has been bookmarked
- You have a reply to your comment
- You have been featured
- You have been awarded
- You have been introduced

Question 4: “What TBS info should be displayed on the TBS tab on the GoTriple registered user profile page?”

- My network
- My featured
- My newsfeed
- My communities (technically not feasible to be implemented in TBS v1)

³⁰ See *Section 3.3 Frontend*, in Bouillard, M. et al., *D5.3: Report on the Trust Building System Development*, TRIPLE, 2021.

- My chats (technically not feasible to be implemented in TBS v1)
- My profile
- menu
 - My received invitations
 - My notifications
 - My favourites
 - My coins
 - My settings
 - Log out
 - About
 - FAQs
 - Donate
 - Community guidelines
 - Privacy policy
 - User terms
 - Feedback
 - Bug report
 - Build information

Question 5: “Where would be the best place to connect your GoTriple and TBS accounts?”

- On the GoTriple registered user profiles/personal information pages.

4. TBS SURVEY ON SSH “URGENT AND PRESSING NEEDS”

Here is a link to the Survey:

<https://survey.know-center.tugraz.at/index.php?r=survey/index&sid=285364>

4.1 Context and objectives

As a complement to the TBS co-design workshops, a survey was planned to gain additional input on SSH researchers’ Urgent and Pressing Needs. The survey was circulated among the TRIPLE consortium and a selected few of their partners. This TBS TRIPLE user survey was conducted as part of the Work Package 3.3 activities. It ran from May 18, 2021 until June 18, 2021 and resulted in 72 usable answers from respondents with backgrounds in a wide variety of SSH disciplines as well as from the non-academic arena. The questionnaire was prepared with the purpose of obtaining a broader overview of the end-user needs for GoTriple and more specifically for the TBS.

The main aim of the survey was to generate answers to the following research question: “What are the urgent and pressing needs when it comes to connecting to reliable partners?”. Some of the key results of this research are: (1) Algorithmic recommendations could complement the human referral system based on one’s record and browsing history (e.g. people citing similar references); (2) Algorithmic recommendations could help suggest new potential partners in addition to the human referral system; (3) Make sure not to use jargon to onboard non academics. The results obtained from the questionnaire directly complement the co-design workshops and are meant to further inform the design and the shape of the TBS within the GoTriple platform.

4.2 Methodology

The instrument for data collection was the Limesurvey³¹ questionnaire, an open source software for the purpose of data collection. The work on the preparation of the questionnaire was led by the WP3.3 Task leader Meoh ASBL with the support of several other partners, notably the Know Center³², who helped co-design and publish the survey, and Abertay which provided expert insights in survey preparation. The full questionnaire is included in Appendix 3.

The opening page of the survey provided information to respondents about the project and the reasons for data collection. The distribution of the questionnaire was accompanied by very detailed information about the purpose of the questionnaire and of the TRIPLE project. The second page of the online questionnaire contained the informed consent, with respondents required to read the consent and subsequently give consent (YES, I consent) or refuse consent

³¹ <https://www.limesurvey.org/>

³² <https://www.know-center.tugraz.at/en/>

(NO, I do not consent), with the questionnaire terminating immediately in the second case and directing people to a “Thank you” page. The informed consent and the specific question collecting the consent can be seen in the questionnaire in the Appendix.

The questionnaire had three sections:

1. Survey presentation and informed consent (1 question)
2. Demographics (2 questions)
3. Specific questions on the urgent and pressing needs of SSH researchers when it comes to multistakeholder collaboration
 - a. Interactions with partners (1 question)
 - b. Trust Building System use cases (3 questions)

4.3 Survey results

4.3.1 Age range of respondents

Question 1: Please tell us your age range

72 people participated in the survey. We got widespread participation across age ranges of potential end-users of the GoTriple discovery platform. Respondents were aged between:

- 18 and 29 years old, 15% (11 people)
- 30 and 39, 30% (22 people)
- 40 and 49, 36% (26 people)
- 50 and 59, 17% (12 people)
- 60 or more, 1% (1 person)
- > 70, 1% (1 person)

4.3.2 Participants’ representation by stakeholder’s group

Question 2: Please tell us your stakeholder’s group:

When looking at which stakeholder’s group participants belong, Academia came first (54%), and especially the SSH community (36%). We managed to get 46% of non academic respondents, which is critical since GoTriple aims at connecting SSH researchers to non-academic partners. Those non-academic survey participants are spread among:

- SMEs (14%),
- Civil Society (10%),

- Public services or Policy making (6%),
- Press/Media (6%),
- NGOs (3%),
- Large enterprises (2%),
- and the “others” category (5%).

In order to maximize the number of answers from potential end-users, we followed the recommendation from Task 7.1 “Power-Interest Matrix” (D.7.1 Figure 4), and from Task 8.3 “Communication strategy/target audience” (D.8.3 Figure 1). We paid particular attention to collecting feedback from outside the obvious SSH and academic circles. This helped us get a more comprehensive understanding of the Urgent and Pressing Needs of the GoTriple discovery platform end-users when it comes to detecting and connecting to reliable partners.

Academic position

If survey participants chose “Academia”, a sub-question would pop up, offering them the option to give a more precise description of their academic position. The results show that no particular academic position is more represented than others.

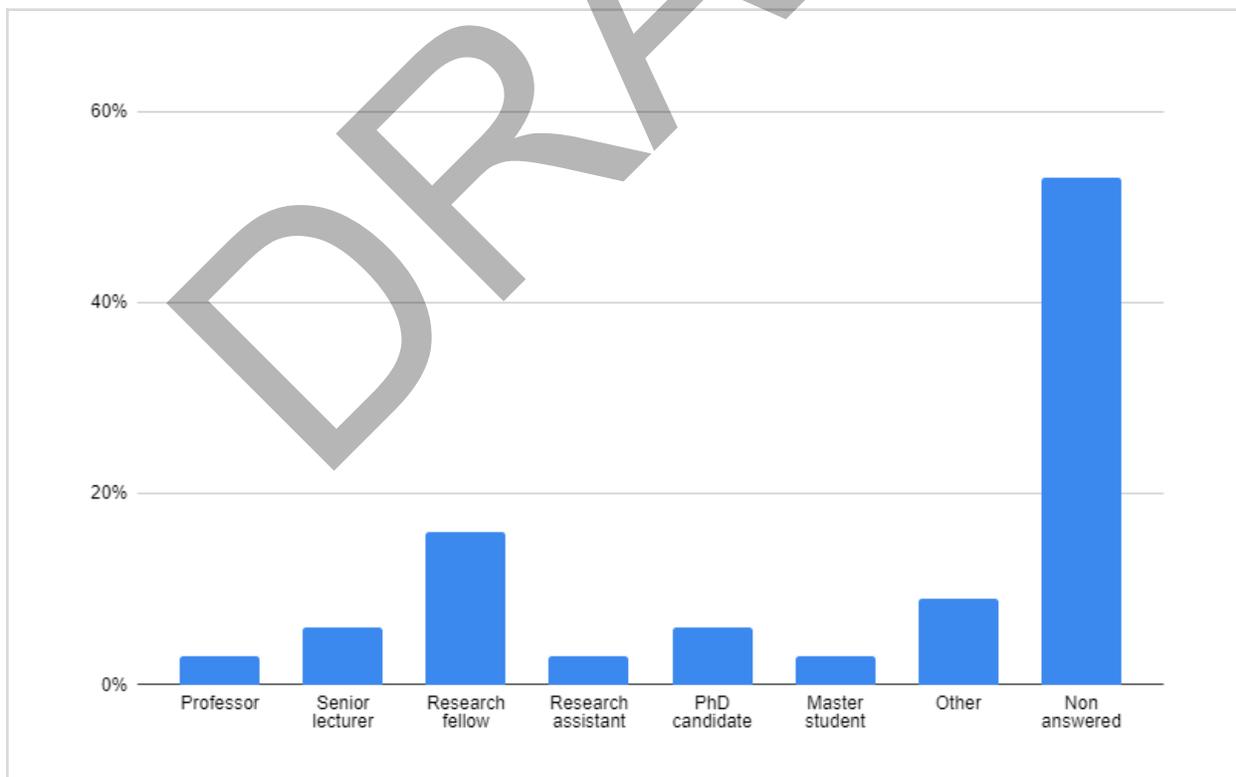


FIGURE 25: Academic positions of TBS survey respondents.

4.3.3 Preferred media to find reliable partners

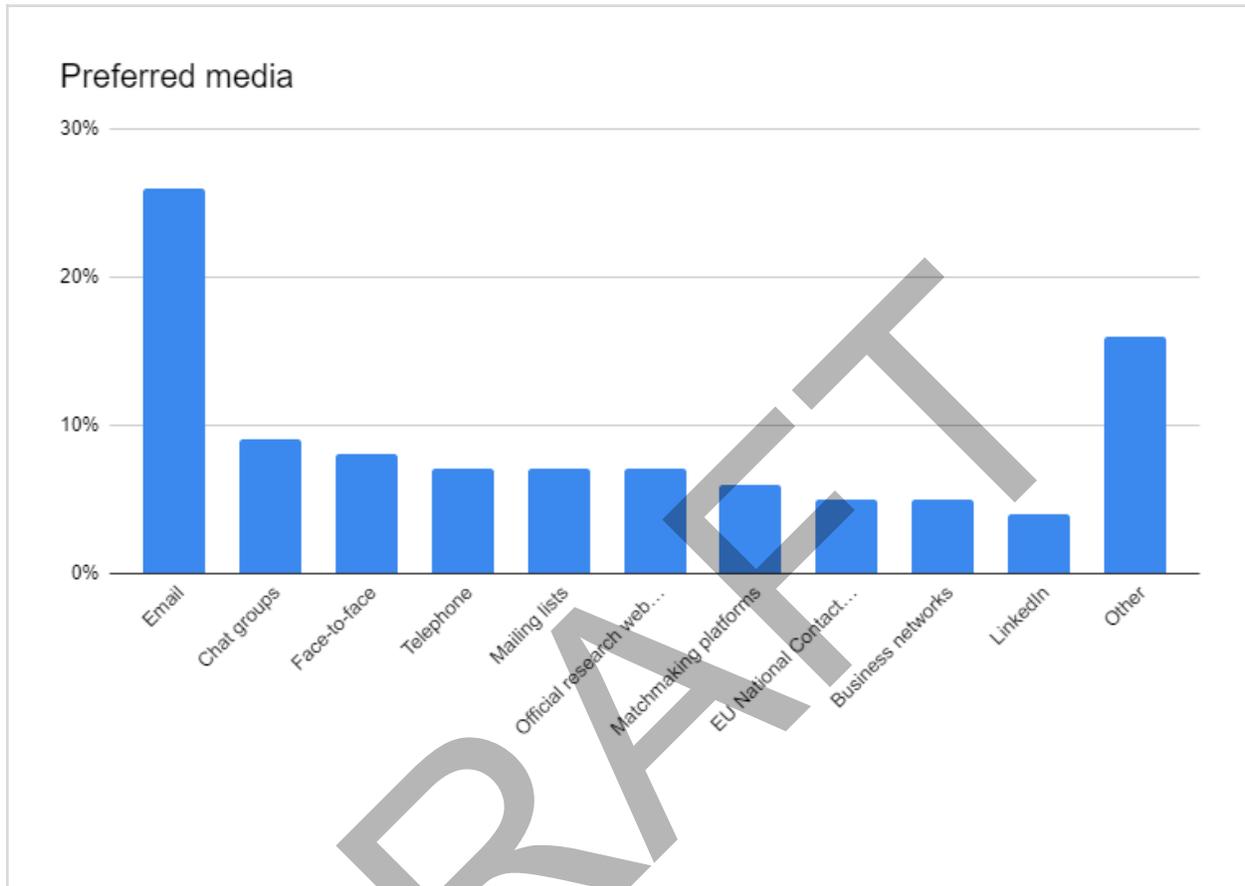


FIGURE 26: Preferred media to find reliable partners for collaborations.

Question 3: How do you plan to reach out to new partners?

The third question asked people how they planned to find new partners for collaborations, given the travel restrictions which had been going on at various levels at the time of the survey.

A wide selection of answers was offered. For each option, one could give more precision as to the shortcomings and advantages of the selected option. People could choose as many options as they wanted.

Upon selection, a new open text box would appear:

What are the shortcomings and advantages of **connection requests to internal channels or mailing lists** (e.g. Slack, Mattermost etc.)?

Shortcomings

Advantages

FIGURE 27: Shortcomings and Advantages of preferred media to find reliable partners.

The preferred option of respondents is clearly email, gathering 26% of preference. Then came a second group of preferred options which all got more or less the same preference’s rate, with chat groups (9%), face to face interactions (8%), telephone (7%), mailing lists (7%), official research websites (7%), matchmaking platforms (6%), EU National Contact Points (5%), Business networks (5%). Last, came the “Connection requests to unknown people e.g. LinkedIn” (4%). The remaining 16% falls into the “other/none/unanswered” category. In this latter section “others/none/unanswered”, people said they would either count on people they already know to help them find reliable partners or count on luck through online meetings.

Bearing in mind that emails are likely to be less used by people aged under 30 years old, the result of this question is to be mitigated by this upcoming trend.

To better understand those numbers, we examined the shortcomings and advantages found by respondents (see Appendix 3), grouped them into categories, and organised them by each media option:

- **Personal emails to trusted contacts**

Shortcomings	Further Analysis by Respondents
Not efficient (58% of answers)	Either because people would not answer for a variety of reasons, or because it takes too much time to get results.
Limited outreach (33% of answers)	Because one tends to stay within their own circles.
Limit of the interaction to the written media (9% of answers)	Because email is limited to text without hearing the voice or meeting the target person physically.

Benefits from trusted relationships (67,5% of answers)	Trust leads to higher engagement and to a higher quality of answers.
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Advantages	Interpretation
Benefits from trusted relationships (67,5% of answers)	Trust leads to higher engagement and to a higher quality of answers.
Efficient (32,5% of answers)	One is very likely to get a fast and meaningful reply.

- **Official research (partner) websites (e.g. Cordis)**

Shortcomings	Interpretation
Not efficient (100% of answers)	Mainly because the information provided is usually too vague to lead to a good match.

Advantages	Interpretation
Wide outreach (37,5% of answers)	It provides a wide range of contacts and can be useful to meet the geographical balance required by a EU consortium.
Well structured (37,5% of answers)	It provides a clear categorisation that enables efficient searching.
Good networking opportunities (25% of answers)	Usually people are engaged and interested on this type of platform.

- **Matchmaking platforms (e.g. EUcalls.net)**

Shortcomings	Interpretation
Expensive (100% of answer)	Relative large fees both for standard and tailored plans.

Advantages	Interpretation
Reliable (86% of answers)	Partners are registered which provides relevant information on their identity and motivation.
Good networking opportunity (14% of answers)	Because you can go outside of your usual social circles.

- **EU National Contact Points (NCP)**

Shortcomings	Interpretation
Inefficient (100% of answers)	Limited availability, procedure oriented, lack of personal contact.

Advantages	Interpretation
Personal recommendations (67% of answers)	Since they are real people, they can go in depth and be more flexible in supporting someone's request.
Networking opportunities (33% of answers)	They are well connected in the European ecosystem of research, enterprises, and funding.

- **Business Networks (e.g. Enterprise Europe Network, Chambers of Commerce)**

Shortcomings	Interpretation
Inefficient (100% of answers)	Too broad, standards not harmonised across the EU, sometimes narrow-minded and too focused on business.

Advantages	Interpretation
Efficient networking for business partners (100% of answers)	Ease of outreach.

- **Mailing lists (e.g. Slack, Mattermost)**

Shortcomings	Interpretation
Inefficient (88% of answers)	Too general, not targeted enough.
Limited outreach (12% of answers)	Limited to the people who are already known.

Advantages	Interpretation
Efficient (40% of answers)	Easy to set up, good outreach, usually good feedback rate.
Targeted (40% of answers)	Usually an established network with people sharing similar interests and engaged with one another.
Networking opportunities (20% of answers)	Chances to reach out to new partners beyond the usual suspects.

- **Chat groups (e.g. WhatsApp, Telegram, Signal, SMS, etc.)**

Shortcomings	Interpretation
--------------	----------------

Limited outreach (55% of answers)	Because limited to people one already knows though those might recommend someone.
Inefficient (45% of answers)	Because it might only work when there is already an established track record of past collaborations.

Advantages	Interpretation
Efficient (89% of answers)	Easy to use, high engagement because they are private, personal, and reliable.
Good networking opportunities (11% of answers)	Perhaps my contacts know people who could help me.

- **Connection requests to unknown people (e.g. Twitter, Facebook, LinkedIn, etc.)**

Shortcomings	Interpretation
Somehow inefficient (66% of answers)	Because engagement and replies are not guaranteed.
Outreach limited to first circle of contacts (33% of answers)	Because engagement means either a good introduction or a well established contact.

Advantages	Interpretation
Big outreach (100% of answers)	Great pool of possible candidates from various networks which is a great opportunity to form new collaborations (if successful).

- **Face 2 Face interactions**

Shortcomings	Interpretation
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Limited outreach (73% of answers)	Because it takes time to meet the right person, trying one after another. With some luck the return can be high though.
Covid-like situation and lockdowns (27% of answers)	Because meeting people physically during a lockdown is very challenging.

Advantages	Interpretation
Potentially very efficient (100% of answers)	If you get the right match/person you can get great results really fast and grounded in human experience.

- **Telephone**

Shortcomings	Interpretation
Inefficient (100% of answers)	Because phone calls can be time consuming, annoying, and limited to the people we already know; and if we don't know them, it's kind of a gamble.

Advantages	Interpretation
Potentially very efficient (100% of answers)	If you get the right match/person you can get great results really fast and grounded in human experience.

4.3.4 Preferred features to facilitate matchmaking with reliable partners

The Trust Building System (TBS) is a human-curated referral system and is one of the innovative services of the GoTriple platform. Its purpose is to help SSH researchers detect and connect to reliable partners for multistakeholder cooperation e.g. for interdisciplinary collaboration to explore funding opportunities, for transdisciplinary collaboration to include pilot communities in research projects, or to pitch projects to find PhD students or coordinators for Horizon Europe consortia.

4. The main goal of the TBS is to connect to reliable partners. Which features would you find helpful to facilitate matchmaking with reliable partners?

	Very helpful	Helpful	Neutral	Not that helpful	Not helpful at all	No answer
Make personalized introductions	<input type="radio"/>	<input checked="" type="radio"/>				
Feature/promote/highlight peers to increase their visibility in the network	<input type="radio"/>	<input checked="" type="radio"/>				
Forward/repost peers requests	<input type="radio"/>	<input checked="" type="radio"/>				
Give peers public recognition for their valuable contributions	<input type="radio"/>	<input checked="" type="radio"/>				
Invite peers to private groups to discuss projects	<input type="radio"/>	<input checked="" type="radio"/>				

4.1. Which other features would be helpful to facilitate matchmaking with reliable partners?

FIGURE 28: Preferred features to facilitate matchmaking with reliable partners.

Question 4: Which features would you find helpful to facilitate matchmaking with reliable partners?

The fourth question was: “The main goal of the TBS is to connect to reliable partners. Which features would you find helpful to facilitate matchmaking with reliable partners?”

The majority of respondents found that [Make personalized introductions] is a helpful or very helpful feature (88,8%). (36 Very helpful; 8 Helpful; 6 Neutral).

The majority of respondents found that the feature [Promote/highlight peers to increase their visibility in the network] is helpful or very helpful (82%). 18 very helpful; 22 Helpful; 7 Neutral; 2 Not very helpful.

The majority of respondents found that the feature [Forward/repost peers requests] is helpful or very helpful (88%) 20 Very Helpful; 24 Helpful; 6 Neutral.

The majority of respondents found that the feature [Give peers public recognition for their valuable contributions] is helpful or very helpful (72%). 21 Very helpful; 19 Helpful; 12 Neutral; 3 Not very helpful.

The majority of respondents found that the feature [Invite peers to private groups to discuss projects] is helpful or very helpful (88%); 31 Very helpful; 12 Helpful; 6 Neutral; 1 Not very helpful.

Question 5: Which other features would be helpful to facilitate matchmaking with reliable partners?

Respondents answered that a comprehensive user profile describing as best as possible a user would be useful. Below we have grouped respondents' answers by topics.

- A Comprehensive profile:
 - Showcase deliverables from previous projects by the potential partner.
 - Access their project portfolio (the one accessible via participant portal).
 - Give a hint on their personality.
 - LinkedIn integration.
 - Anything that would bring multi-dimensionality to the matchmaking — person might be reliable but organisation less so, someone might publish a lot but be hard to work with, someone might be the natural facilitator between disciplines (and will probably have poor academic career as a result).
 - A space/feature for direct contact with policymakers would help.
- Algorithmic support:
 - Suggested researchers feature, based on one's record and browsing history? (e.g. people that cite the same people you cite).
 - Structured description for automatic matching.
 - Anonymous Social graph of each peer.
- In real life meeting:
 - Open days, get-together events.

4.3.5 What would you use the TBS for?

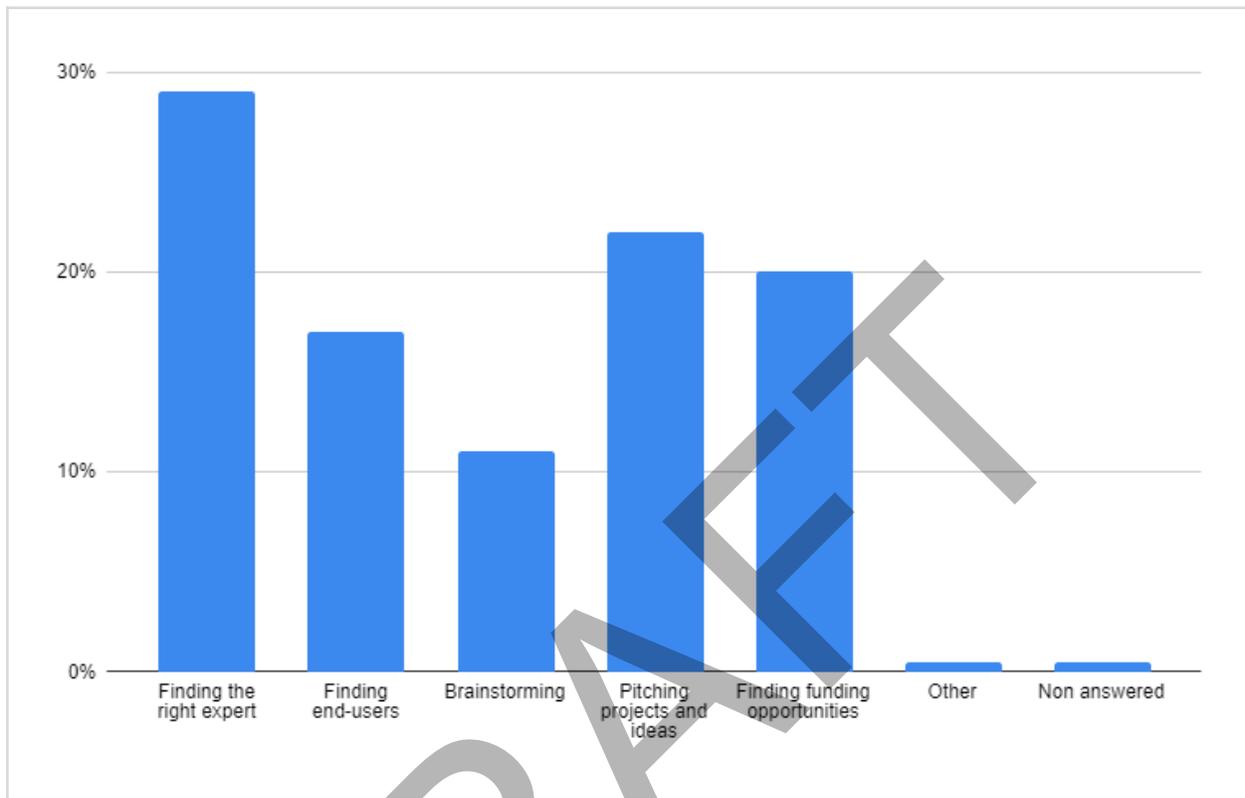


FIGURE 29: What would you use the TBS for?"

Based on the answer selected, a new follow-up question pops up:

For finding the right expert

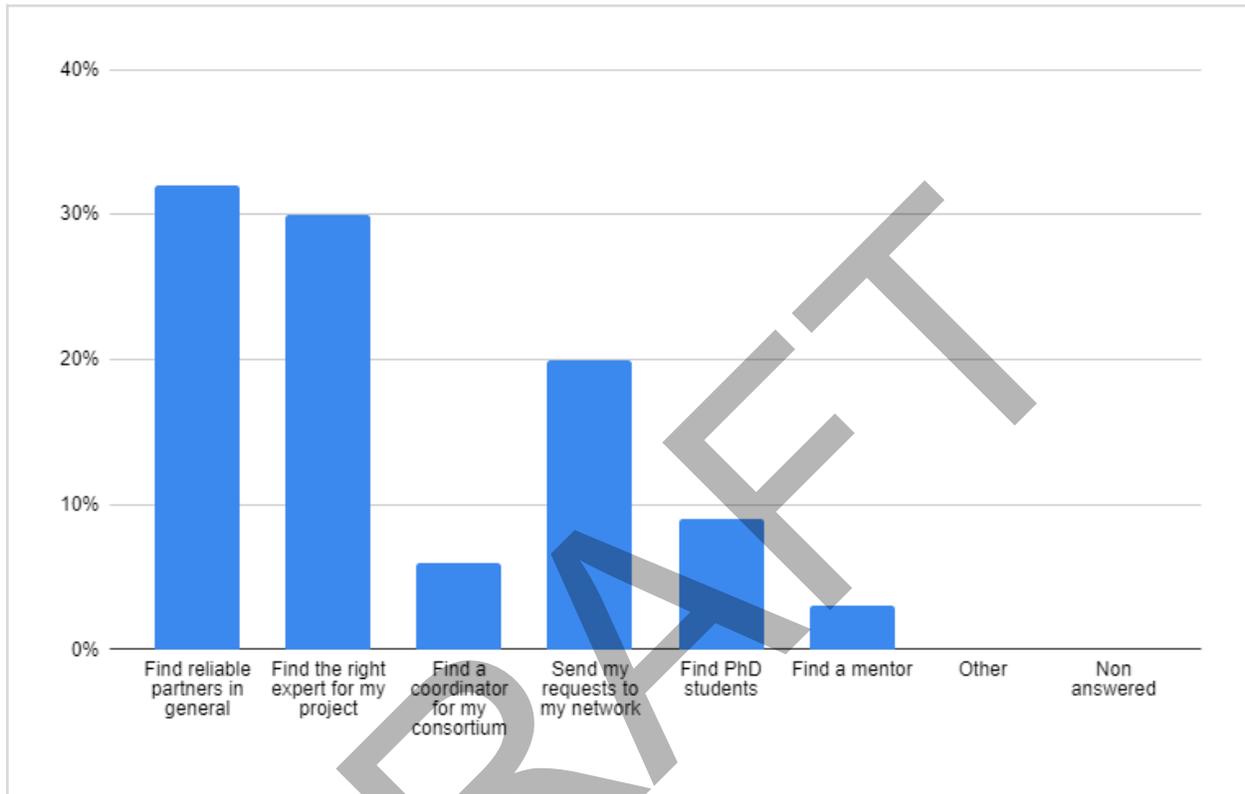


FIGURE 30: Specific purpose of using a TBS regarding finding the right expert.

For finding and connecting to end-users

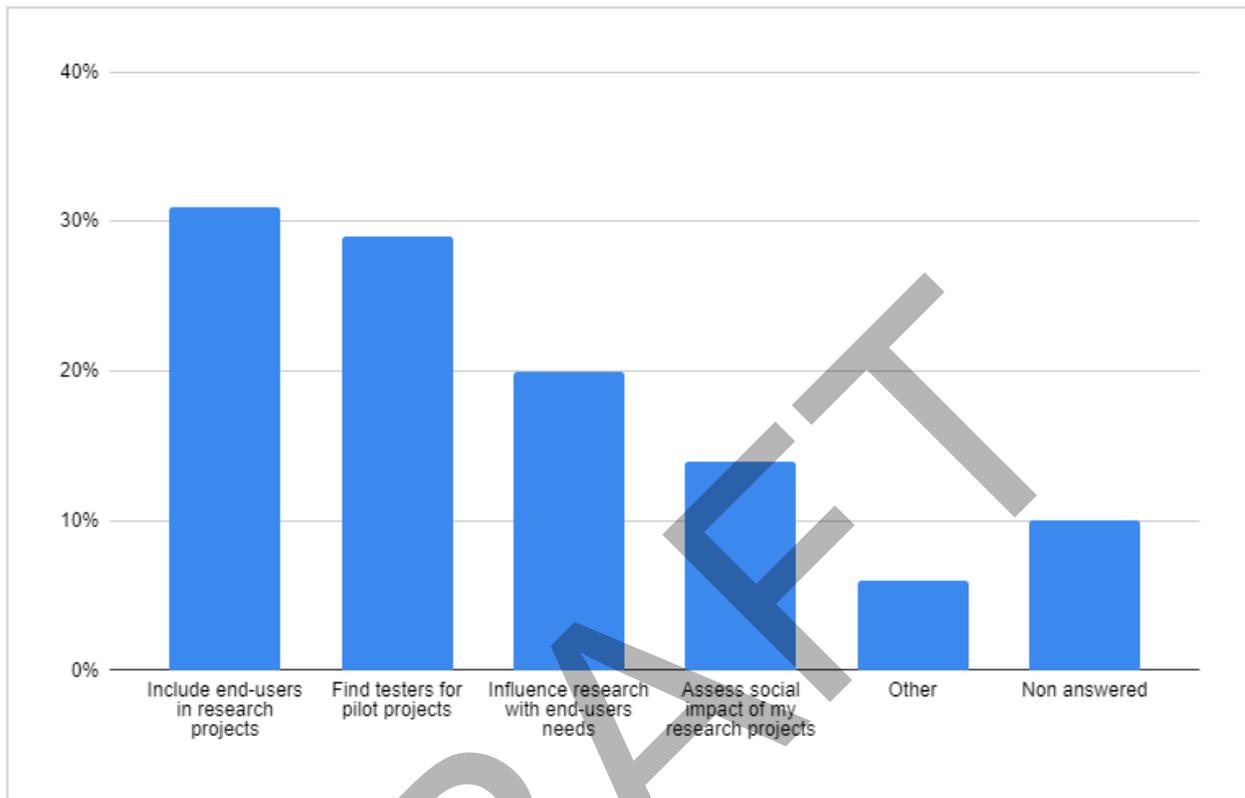


FIGURE 31: Specific purpose of using a TBS regarding finding & connecting to end-users.

For brainstorming

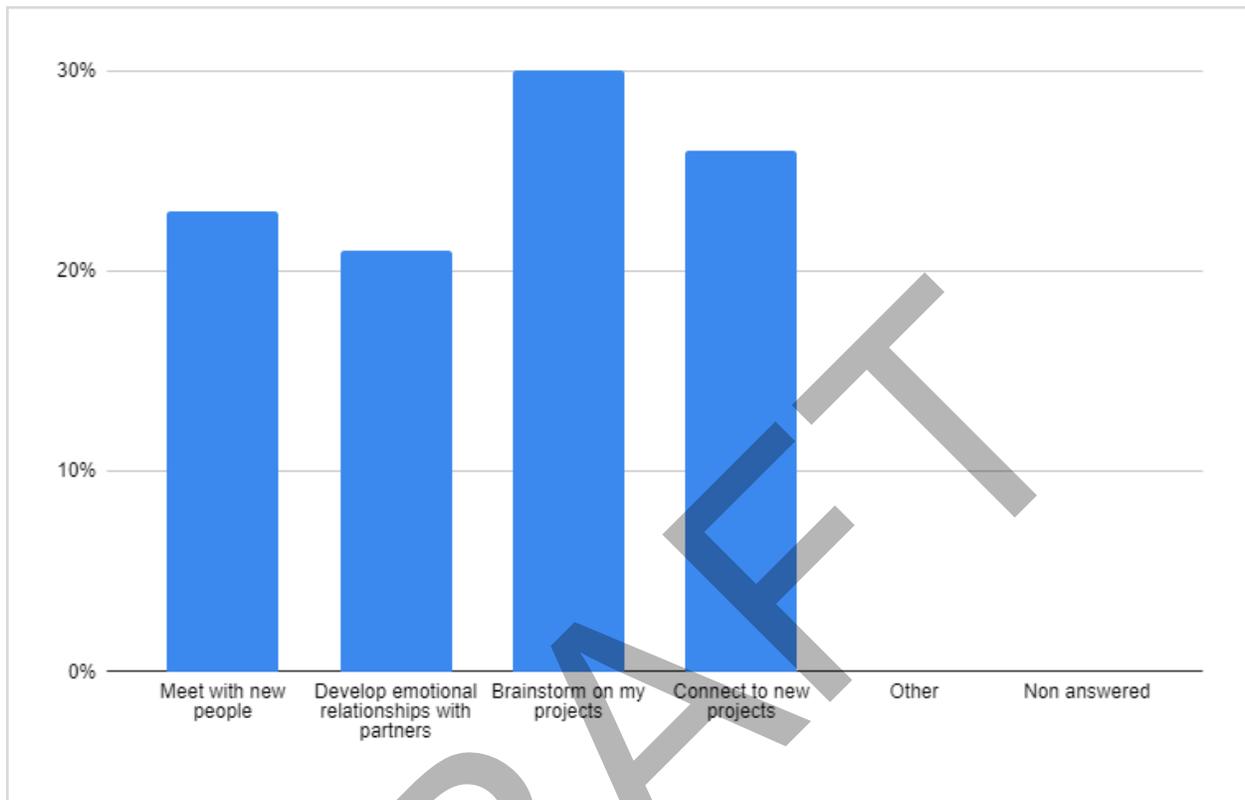


FIGURE 32: Specific purpose of using a TBS regarding brainstorming.

For pitching projects and ideas

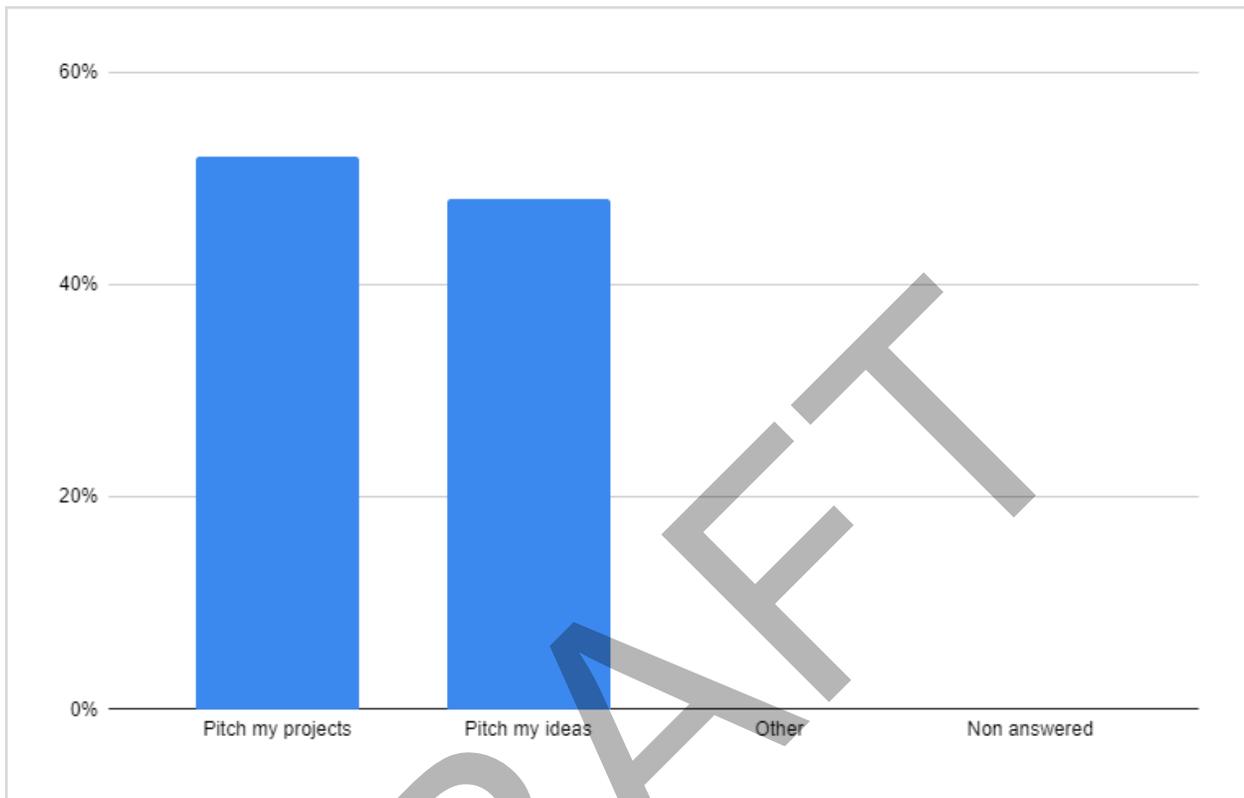


FIGURE 33: Specific purpose of using a TBS regarding pitching projects and ideas.

4.3.6. Recommendations from the TBS SURVEY for TRIPLE Task T.5.3

The TBS survey provided a great pool of useful information which often confirmed the output of the previously conducted workshops.

We have listed the survey recommendations in the table below.

TABLE 22: TBS survey recommendations

1. User cooperation profile could showcase past deliverables from new potential partners.
2. The user cooperation profile could highlight the strengths and weaknesses of new potential partners as well as of the organisations they belong to.
3. A space/feature for direct contact with policymakers would help.
4. Algorithmic recommendations could complement the human referral system based on one's record and browsing history (e.g. people citing similar references).
5. Algorithmic recommendations could help suggest new potential partners in addition to the human referral system.
6. Algorithmic support could help anonymous social graphs of peers in the network.
7. Make sure not to use jargon. Outsiders such as policy makers might not have heard about the EU project consortium or other kind of jargon.

5. CONCLUDING REMARKS

Within the present report, we provided the foundation for one of the innovative services of GoTriple - the Trust Building System - as well as the context for its development. By applying a variety of co-design methods and tools, and having worked with a rich panel of users we gained important insights into the purpose, guiding principles, and values of such a system. This helped us to come up with a first draft of the community guidelines underlining the ethics of the system. It also gave us valuable recommendations on functionalities such as the inviting and posting processes and for the design of the cooperation profiles and the newsfeed. It also helped us to optimise the TBS integration within GoTriple.

From end-users' input and collected data we derived mock-up designs for each stage of the user experience. The results were further processed to inform and improve the TBS designs for the TRIPLE Deliverable 5.3 whose purpose is to implement the recommendations from the present report D.3.3 in order to develop the TBS.

Our main conclusion is that those recommendations are wishes that need to be compared with technological and budgetary constraints prior to implementation. We recognize that the Trust Building System offers unique features that can increase the interest towards GoTriple, notably thanks to the trusted components that distinguish this service from mainstream social networks. Finally, the integration of those results into D.5.3 "Trust Building System" paves the way for the development of a resilient Trust Building System and its integration into GoTriple.

6. REFERENCES

- [1] Forbes, P. et al., *D3.1: Report on End Users*, TRIPLE, 2021.
- [2] Breitfuss, G. et al., *D7.1: Report on Stakeholder-and Opportunity Analysis*, TRIPLE, 2021.
- [3] Pohle, S. et al., *D8.3: Communication Strategy*, TRIPLE, 2021.
- [4] Bouillard, M. et al., *D5.3: Report on the Trust Building System Development*, TRIPLE, 2021.

DRAFT

APPENDICES

Appendix 1: Workshops material

1. Appendix 1- Pre-workshop #1 survey: <https://bit.ly/3iZlXho>
2. Appendix 2- In-workshop #2 survey: <https://bit.ly/3eZXEhU>
3. Appendix 3 - Pre-workshop #3 survey: <https://bit.ly/3BPfxK0>
4. Appendix 4 - Pre-workshop #4 survey: <https://bit.ly/375Nx6N>
5. Appendix 5 - Community Guidelines
 - a. Pre-workshop draft of Community Guidelines: <https://bit.ly/3lfT2bF>
 - b. Pre-workshop survey: <https://bit.ly/3x8XcEg>
6. Appendix 6: In-workshop #6 survey: <https://bit.ly/3kZO8iL>
7. Appendix 7: In-workshop #7 survey: <https://cutt.ly/EQyRbCB>

APPENDIX 2: SUMMARY OF RECOMMENDATIONS FOR D5.3

Recommendations from D3.1, D.7.1 and from the eight TBS co-design workshops. Recommendations in bold are those that seem the most relevant to us in regard to feasibility and technical implementation.

1. **R.0.1:** Provide academic users with a social network to better connect and work within, across, and beyond their own fields of expertise and disciplines.
2. R.0.2: Enable users to find academics/key researchers within an area of expertise.
3. **R.0.3:** Enable users to view mutual acquaintances.
4. R.0.4: Enable users to send invitations to an event.
5. R.0.5: Enable users to find out what type of collaboration other researchers are interested in.
6. R.0.6: Enable users to search for a native English speaker in their academic area.
7. **R.0.7:** Enable users to view Special interest Groups (SIG).
8. **R.0.8:** Enable users to connect with others via the SIG.
9. **R.0.9:** Enable users to view posts in the SIG.
10. **R.0.10:** Search “Communities of Practice” by topic or project.
11. R.0.11: Enable searches to find and follow relevant projects and people rather than just publications.

12. **R.0.12:** Enable academics to provide and receive introductions and recommendations to and from friends/colleagues/trusted contacts.
13. **R.0.13:** Create an “Introduce” function between people who don’t know each other but who could help each other via a trusted intermediary. An alert would be prompted in case users are already connected.
14. **R.0.14:** Respond to the concerns regarding Covid-19's effect on work life. The “negative effects of the corona pandemic on projects and the economy” was described as a threat. We addressed this question in the survey “Urgent and Pressing Needs of the SSH community” by asking respondents how they planned to reach out to new potential partners online.
15. **R.0.15:** Increase the chances of requests to be solved by making them visible to second degree connections through the “featured peers.”
16. **R.0.16:** Make landing pages easy to understand; too many menus, services and functionalities may overwhelm users.
17. **R.0.17:** Consider chat and emails as preferred social media, potentially audio recording too.
18. **R.1.1:** Create a user-friendly system offering easy communication between SSH researchers and other stakeholders such as Policy Makers and Civil Society.
19. **R.1.2:** Develop a service that encourages informal interactions in order to enhance trust.
20. **R.1.3:** Make the system mobile-friendly.
21. **R.1.4:** Focus on existing trusted relationships and expand from there.
22. **R.2.1:** Reflect the values of Trust, Diversity, Sustainability, Accountability, Inclusivity, and Transparency in the design of the TBS.
23. **R.2.2:** Limit personal networks to one hundred and fifty participants.
24. **R.2.3:** Curate the network with an invite-only system and with the triangulation of new introductions by trusted intermediaries.
25. **R.2.4:** Encourage users to engage in informal interactions.
26. **R.2.5:** Bind TBS users with Community Guidelines that reflect the core Values and Principles of the TBS.
27. **R.2.6:** Reflect sustainability in the technological and energy consumption choices of the platform.
28. **R.3.1:** Create a newsfeed for people to display their requests and for others to help solve them.
29. **R.3.2:** Set up a process, based on a community of practice, where people’s behaviour could affect the reputation of their peers.
30. **R.3.3:** Provide sufficient information for users to assess the personality of their peers.
31. **R.3.4:** Offer social bridges to find reliable partners through human referral.
32. **R.3.5:** Enable the possibility to forward published requests to trusted contacts who could potentially help solve them because they would have the expertise or would know someone who would have the required expertise.

33. **R.3.6:** Create Special Interest Groups to form communities of practices that could discuss and share ideas.
34. **R.3.7:** Curate the network through private invitations.
35. **R.3.8:** Provide gamifications mechanics such as awards with a set of incentives to make them valuable.
36. **R.4.1:** Implement or adapt the suggested TBS cooperation profile.
37. **R.5.1:** Implement the Community Guidelines, bound to evolve over time and to adapt to the TBS changes.
38. **R.6.1:** Create a newsfeed showing the activity of the trusted network.
39. **R.6.2:** Remove the audio-messaging functionality in the desktop version of the system.
40. **R.6.3:** Embed customer support e.g. videos explaining the user journey, features, or a chat bot.
41. **R.6.4:** Make sure that the system gains stability.
42. **R.6.5:** Put the focus on the Trusted Network and on the Newsfeed pages for a greater user experience.
43. **R.6.6:** Test the TBS over a longer period of time.
44. **R.7.1:** Make the newsfeed the default landing page.
45. **R.7.2:** Enable comments editing and improve the visibility of the “comment, forward, repost, and bookmark” icons.
46. **R.7.3:** Place newest activities on top of the newsfeed stream.
47. **R.7.4:** Provide tutorials to explain functionalities e
48. .g. short explanatory videos.
49. **R.7.5:** Insert the Chat in the main “Plus” button.
50. **R.7.6:** Enable video calls.
51. **R.7.7:** Provide additional information on people who are not yet in one’s network to add some human touch and to better grasp those populating the networks of their trusted peers.
52. **R.7.8:** Import contacts from other social media accounts.
53. **R.7.9:** Indicate the amount of mutual contacts between users.
54. **R.7.10:** Trigger a system alert if users try to introduce people who are already connected with each other.
55. **R.8.1:** See suggested way to integrate the TBS into the GoTriple Discovery Platform.

APPENDIX 3: TBS SURVEY

3.1 Invitation emails used for survey distribution

First email sent by the TRIPLE project's coordinator to the whole consortium on 18.05.2021

"Dear TRIPLE partners,

I hope my email finds you well and with a positive mind ! Your contribution is required for a **5 min survey** to help the development of the co-design of the [Trust Building System](#).

It would be very useful for Meoh to hear about your concrete urgent pressing needs when it comes to connecting to reliable partners. So please, give a bit of your time for answering this [SURVEY](#).

Thanks in advance!

All the best and take care,"

Suzanne Dumouchel, TRIPLE project coordinator, on behalf of the TRIPLE consortium

1st reminder sent by Task 3.3. Leader on 02.06.2021

Dear Triple partners,

I hope this email finds you well :-)

A gentle reminder to those who have not completed the 5mn [survey](#) yet, and a big thank you to the 12 people who did complete it! We target around 100 answers, therefore everybody's help would be greatly appreciated.

This survey about your concrete urgent pressing needs when it comes to connecting to reliable partners would greatly contribute to the development of the co-design of the [Trust Building System](#).

The TBS is all about Trust and Cohesion, thank you in advance to help co-design it at its best, and feel free to circulate it to people of interest.



Wishing you the best of success and a very nice day and week,
Best wishes,

Maxime Bouillard, Meoh ASBL Project manager

2nd reminder sent on 09.06.2021.

Dear Triple partners,

I hope you are doing well.

A very gentle, and **last** reminder to those who have not completed the 5mn survey yet, and **a big thank you** to all of you who did complete it! We target around 100 answers, therefore everybody's help would be greatly appreciated.

This survey about your concrete urgent pressing needs when it comes to connecting to reliable partners would greatly contribute to the development of the Trust Building System..

The TBS is all about Trust and Cohesion, thank you in advance to help co-design it at its best, and feel free to circulate it to people of interest.

Wishing you the best of success and a very nice day and week,
Best wishes,

Maxime Bouillard, Meoh ASBL project manager

3.2 TBS Survey

Link to the survey: <https://survey.know-center.tugraz.at/index.php?r=survey/index&sid=285364>

Dear Participant,

First, thank you for contributing to our research regarding the Trust Building System of [GoTriple](#).

The Trust Building System (TBS) is a human-curated referral system and is one of the innovative services of GoTriple. GoTriple stands for Transforming Research through Innovative Practices for

Linked Interdisciplinary Exploration. It is an innovative multilingual and multicultural discovery solution for the social sciences and humanities (SSH).

The purpose of the TBS is to help SSH researchers to connect to reliable partners and especially in the context of new or existing EU consortia e.g.:

- Find consortium members or coordinators for Horizon Europe/Erasmus consortia
- Find the right collaborators i.e. PhD students or non academic experts i.e. policy makers
- Connect to end users such as pilot communities and workshop participants

In this survey, we would like to know more about your concrete urgent and pressing needs when it comes to connecting to reliable partners. This survey will take approx. 5 minutes to complete.

Thank you very much for your collaboration!

If you have questions, please contact:

Maxime Bouillard

DRAFT

THE QUESTIONNAIRE

Consent

MEOH ASBL is a not-for-profit organization registered under Belgian law as company number 0599986669. MEOH ASBL is responsible for the storage of your data and acts as Data Controller. Your data will only be accessible to the research partners of the TRIPLE project for its duration. Afterwards the data can become open data to be used by other researchers for the purpose of their research. The research contact person for MEOH ASBL is Maxime Bouillard and can be contacted by email at maxime.bouillard@meoh.io and by telephone at 0032 495 101 982.

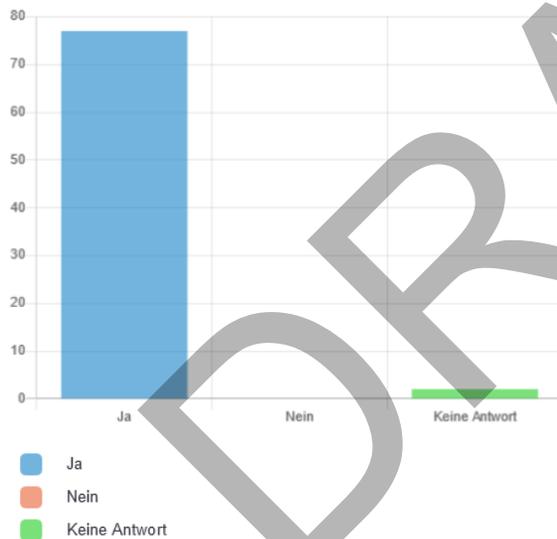
*Dear Participant,

do you consent to take part freely to this questionnaire, and that those survey anonymous data are collected for the research purposes of the OPERAS/TRIPLE/Trust Building System, and later used for research purposes and as a deliverable to the European Commission?

Yes No

ⓘ If you select "No", the survey will be terminated.

Dear Participant, do you consent to take part freely to this questionnaire, and that those survey anonymous data are collected for the research purposes of the OPERAS/TRIPLE/Trust Building System, and later used for research purposes and as a deliverable to the European Commission?



Demographic Questions

*1. Please tell us your age range:

Choose one of the following answers

- < 18
- 18-29
- 30-39
- 40-49
- 50-59
- 60-69
- > 70

If you select "< 18", the survey will be terminated.

*2. Please tell us your stakeholder's group:

Choose one of the following answers

- Academia (social sciences and humanities)
- Academia (other than social sciences and humanities)
- Civil Society
- Public Services/Policy making
- SME
- Large enterprise
- NGO
- Press/Media
- Other:

3. With travel restrictions, we do not have the possibility to meet people at conferences or during informal meetings e.g. coffee breaks, dinner parties, etc. How do you plan to find partners you have never worked with before, e.g. for your current projects or for the next round of calls for participation for Horizon Europe, Erasmus, etc.?

Check all that apply

- Personal emails to trusted contacts
- Official research (partner) websites (e.g. CORDIS)
- Matchmaking platforms (e.g. EUCalls.net)
- EU National Contact Point (NCP)
- Business networks (e.g. Enterprise Europe Network, Chambers of commerce)
- Mailing lists (including Slack, Mattermost, etc.)
- Chat groups (e.g. WhatsApp Signal, Telegram, SMS, etc.)
- Connection requests to unknown people (e.g. Twitter, facebook, Linked In, etc.)
- Face to face interactions
- Telephone
- None
- Other:

QUESTION 3/People who answered "others", suggested:

- Contact networks of the ongoing and terminated projects (essentially a targeted "friend of a friend" network - narrower but deeper than LinkedIn contacts)
- online events
- online meeting
- Coordination among currently active EU-projects
- Online meetings with previously unknown persons (e.g. a meeting about project A where person B seems keen on doing something, me as well, then we contact each others and we start planning)
- virtual meetings of all sorts
- Via a COST action I am participating in, and a W3C working group I'm a member of
- Cold contacts

Shortcomings

- It is time consuming/not efficient (11 replies = 32%)
 - you need time to explain the context
 - time consuming process
 - Time consuming
 - takes time and effort
 - time delays
 - time consumption

- it takes time
- takes time/can be repetitive
- It can take time to get the communication going
- duration-mass mails are not personal enough; one to one are too long/take too much time
- Ideally I would send one email to a personal mailing list, however my contacts would be less engaged since they would not find my request "personalised"
- Limited outreach (11 replies = 32%)
 - limited outreach
 - Same people -> less diverse
 - small group
 - you need to know people before hand
 - Limited number of contacts
 - You don't come to meet people outside of the 'bubble' but rather rely on your existing network
 - limited to the people I know
 - You tend to stay within your own circles
 - one person at a time...means you depend on the people you know
 - limited number of people I can get in touch with
 - maybe limited to my friends? though they could recommend other—their own friends
- People may not answer (8 replies = 24%)
 - The availability of the right email contacts
 - people may miss/ignore the email or take far too long to responding
 - Overhead, email fatigue of the recipients
 - emails could get lost in many mails
 - You never know if they will reply
 - May simply be deleted without being read.
 - Often lost in a deluge of emails
 - can be a slow process to get your answer
- Limit of the interaction to the written media (3 replies = 9%)
 - lack of real/human interaction
 - lack of f2f contact
 - you miss face-to-face contacts
- Data protection issue(1 reply = 3%)
 - data protection, annoying

Advantages

- Efficient (13 answers = 32,5%)
 - most people will actually reply
 - you know you will get an answer
 - they are quick and easier to arrange than a specific meeting
 - quick and easy
 - asynchronous communication
 - best way to explain your needs
 - Efficient, direkt
 - I know people will answer
 - Efficient
 - asynchronous exchange of communication, mail can be dealt with whenever the recipient feels like it
 - fast/reliable/efficient
 - it works
 - people help me

- Proximity/trusted relationship; leads to engagement (27 answers = 67,5%)
 - direct contact, personal note
 - The possibility to explain clearly and fully the purpose of the contact
 - Personal communication
 - Shared tacit knowledge of the respective interests and personalities
 - I know who I am writing to and I expect some engaged feedback
 - Private
 - I know the people I am writing to
 - Same people -> you trust working together
 - It's more personal, it is based on contacts and recommendations
 - The contact already exist
 - reliable group of people that I can work with
 - personal approach
 - Contact rely on an established network with people that share similar interests
 - trusted communication
 - you can trust the quality of the recommendation
 - Already in touch
 - Easy, less stressful way to reach new partners through existing trusted relationships
 - I know them
 - I know them/they are trusted: it is reliable and I am likely to get some engagement and valuable information
 - Once engaged contacts tend to build trust effectively

- targeted; expected high return of quality answer
- Direct line/contact to others quasi guarantee (positive) answers
- reliability; engagement; high return of answer
- fast answer; reliable; trusted
- they are trusted contacts
- usually my contacts get back to me and give me inspiring options
- People who know me can help me

Official research websites (Cordis, etc.)

Shortcomings

- Not very efficient
 - non-personal communication, lack of knowledge
 - you don't always know the exact expertise of institution/people behind
 - lack of real/human interaction, too many institutions listed
 - too many people
 - You never know if people will reply
 - The information may be too broad to be effective, particularly when a quick answer is needed.
 - time delays
 - Not list all projects, and sometimes information are insufficient
 - You need a long time to find the exact type of expert you need (reading their work, listen to youtube videos etc)

Advantages

- Wide outreach
 - choice (can be useful for geographical balance of a consortium)
 - wide range of links and possible contacts
 - Various things are available
- Well structured
 - clear description of the project
 - Connection with oficial programs and projects.
 - Very good categorization that enables efficient searching
- Good networking opportunities
 - I reach an interested crowd
 - You expand your network

Matchmaking platforms

Shortcomings

- relative large fees for standard and tailored plans

Advantages

- Reliable
 - they are quick and easier to arrange than a specific meeting, possibility to check their portfolio via official channels, etc
 - Dedicated service where all relevant potential partners are supposedly registered
 - reliability of partners list
 - we know the people are actually looking for a partner or project
 - Better than no meeting
- Good networking opportunities
 - May discover people outside your network

EU national contact points

Shortcomings

- Inefficient
 - Trust
 - delay on the response, not specific knowledge of the enquiry
 - they do not reply often quickly and sometimes you don't get the proper contact (you may also receive too many applications to evaluate)
 - Perhaps they won't answer me, I don't know them that well
 - Limited availability
 - rather anonymous
 - May face difficulties because of bureaucratic barriers.
 - Commission oriented

Advantages

- Networking opportunities
 - wide range of contacts
 - through your NCP you can access indirectly the network of NCPs and find contacts in other countries
 - They have a big network
- Personal recommendations

- you can get more than just contacts
- Personalized recommendations
- professional handling
- May promote less probable aggregation of interests and people.
- Commission oriented ;-)
 - I believe in "real people"; and those are real people, actively committed to help me, and "naturally" connected/big network to share with me

Business Networks

Shortcomings

- Inefficient
 - They do not work at the same level in different countries
 - Too many different persons
 - Not efficient if you start from scratch without coordinator or an existing consortium
 - Very broad and not always time efficient
 - Too broad
 - Unreliable
 - Lack of direct human interaction
 - Narrow-minded expertise focused around business at all times, even if labelled ethical/green etc.

Advantages

- Efficient Industrial networking
 - You can find industrial partners through the active EENs
 - Basically the right group
 - Powerful networking accelerator
 - Easy way to connect to people
 - Wide reach
 - Lots of outreach
 - Access to overarching agenda topics
 - You know what to expect, at least in terms of official position, by a short read of the website

Mailing lists

Shortcomings

- Inefficient/ Too general/not targeted enough
 - not targeted to individual people, too general
 - your project needs to be mature enough to be shared
 - Too large a scene?
 - lack of f2f contact, sending messages to many members
 - not very targeted sometimes, not always up to date
 - Not enough targeted
 - One size fits all
 - May simply be deleted without being read.
- Limited outreach
 - Limited reach

Advantages

- Can be efficient
 - you get things in your inbox
 - available at almost no cost
 - Direct feedback, efficient
 - Steady information channel
- Targeted
 - Specialisation
 - group connection, interest in specific topics
 - Contact relies on an established network with people that share similar interests.
 - In the scope of the objective
- Good networking opportunities
 - Find new people you might not have imagined working with before
 - chance to go beyond the usual suspects

Chat groups

Shortcomings

- Limited outreach
 - Idem: maybe limited to my friends? though they could recommend other-their own friends
 - They only contain people I already know
 - Limited to the people I know

- Maybe limited outreach? even though If I ask someone, he/she can help me find the right partner
- Limited to people I already know, problem is that with LinkedIn or so you get less engagement even though you get more outreach
- Inefficient
 - Time consuming
 - Too short to tackle real topics appropriately, risk of misunderstandings
 - Fragmented communication
 - Only works when there is already an established track record of collaboration.

Advantages

- Contacts could recommend someone
 - Perhaps my contacts know someone that could help me
 - High number of possible contacts
- Efficient
 - fast response
 - Fancy
 - Allow more efficient and quicker connections.
 - I know people will answer
 - secure, engaged, private
 - I know them/they are trusted: it is reliable and I am likely to get some engagement and valuable information
 - people answer to that
 - Speed of answer; full trust on the people I know-write to
 - fast answer; reliable; trusted
 - they are private=engaged-trusted: offer good results in principle
 - same as emails (usually my contacts get back to me and give me inspiring options) + I can reach out to more people = more efficient
 - I like it better than emails because I can more easily set up ad hoc groups for the purpose of my request
 - I love it;
 - idem: it works
 - It is my favourite tool: people always reply; it is informal, more engaging, more fun!!!
 - I get what I want

Connection requests to unknown people (e.g; Twitter, Facebook, LinkedIn, etc.)

Shortcomings

- Outreach limited to first circle of contacts
 - Difficult to reach out those outside your personal contacts
 - Ideally you would need to "pre-introduce" yourself. Start a conversation around a post. Especially on Facebook the connection tends to imply personal relationship for many people
- Somehow inefficient
 - May be unsuccessful, more risky, you could end up with zero replies back or with unqualified/irrelevant candidates
 - Might go down in the noise
 - limited engagement/results, perhaps 10% maximum of success; however 10% is already something
 - you don't know if you get results at all-engagement is not guaranteed

Advantages

- Big outreach
 - The dimension of the audience
 - Pool of so many possible candidates from various networks which is a great opportunity to form new collaborations (if successful)
 - Broad reach beyond the personal network
 - huge outreach
 - lots of people see what you post/ask
 - perhaps a good surprise
 - Depends on the platform. LinkedIn allows co-promotion (both grow their network and "importance"). Facebook is very "sticky" - once you make a contact, it is often very easy to maintain the link ("water cooler banter" is OK on Facebook, not on LinkedIn)

Face2 Face interactions

Shortcomings

- Covid-Lock down
 - Difficult to set up especially with travel restrictions
 - Difficulties in meeting face to face in this period, if not with local partners
 - In the context of travel restrictions, contacts are more difficult.
- Limited outreach/time consuming
 - not easy to meet lots of people and time consuming

- I don't see any; perhaps limited results if you don't find the right person?
- Maybe limited outreach? even though if I ask someone, he/she can help me find the right partner
- depends on the person you are talking to
- can be an adventure/one by one-can take some time
- it can take some energy for no results, and conversation can be easily diverted to more personal matters, which can be useful if it helps the contact get back to me later on with inspiring information/contact
- same as emails telephone, same as emails (Ideally I would send one email to a personal mailing list, however my contacts would be less engaged since they would not find my request "personalised")
- reluctance of acceptance or denial

Advantages

- Potentially very efficient
 - close interaction and communication
 - Best type of encounter possible
 - The best form of interaction
 - Development of richer personal connections.
 - emotional bond you can relate to later on to get in touch again with the person; or if it worked the first time, to know "who you are talking to"
 - you know who is the other one; it makes things easier for later; e.g; you build on an existing relationship
 - easier to convince people
 - Speed of answer
 - can be the start of a great relationship because you shared a real life moment, not an electronic one
 - if you have the right match/person: you get great and fast results
 - I can get quick results if I call the right person
 - same as telephone if I get the right person, it can give fast and fantastic results thanks to personalised recommendation; and I can even get introduced to the right person: magic!

Telephone

Shortcomings

- Inefficient/time consuming/limited outreach
 - not always very polite
 - not reaching the person

- Phone calls annoy people (me included...)
- time consuming
- limited number of people I can get in touch with
- it takes time
- Maybe limited outreach? even though If I ask someone, he/she can help me find the right partner
- can be an adventure/one by one-can take some time
- it can take some energy for no results, and conversation can be easily diverted to more personal matters, which can be useful if it helps the contact get back to me later on with inspiring information/contact
- same as emails (Ideally I would send one email to a personal mailing list, however my contacts would be less engaged since they would not find my request "personalised")

Advantages

- Efficient
 - close communication
 - if I reach the person I can directly communicate my concern
 - The contact already exist
 - I can more easily convince someone
 - emotional connection
 - very efficient
 - easier to convince people
 - Speed of answer; full trust on the people I know-write to
 - fast answer; reliable; trusted
 - if you have the right match/person: you get great and fast results
 - I can get quick results if I call the right person