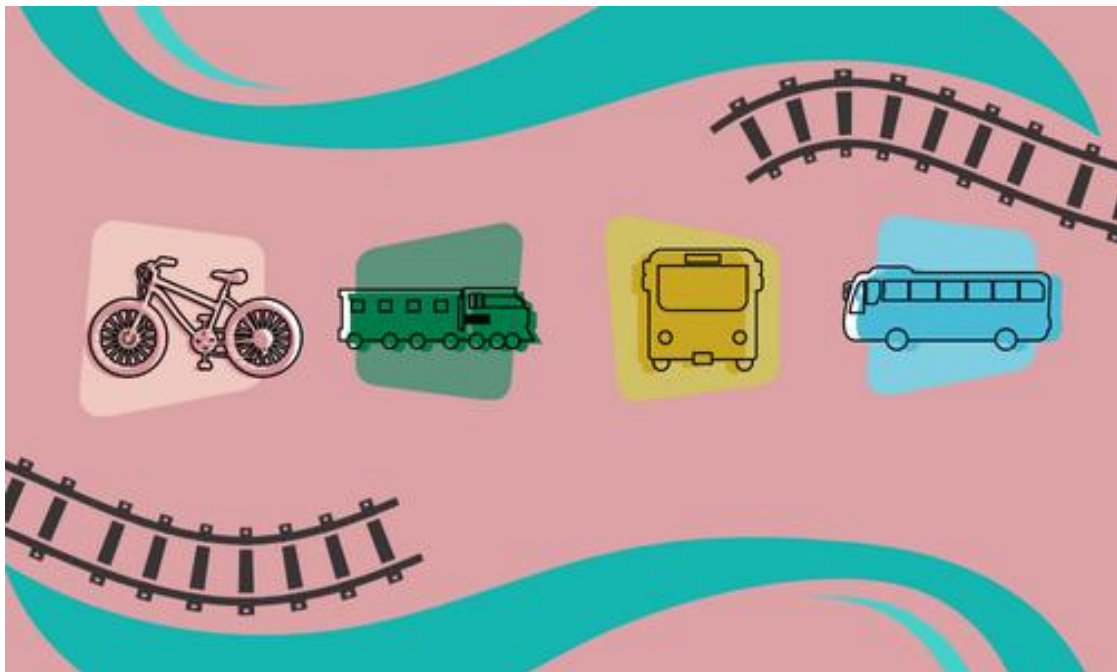




D1.1 - PLAN FOR ENGAGING STAKEHOLDERS



Multimodal Optimisation leveraging Data Acquisition from Local Stakeholders towards a Holistic Improvement of Freight and People Transport



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DEM	Demonstrator, pilot, prototype, plan designs	
DEC	Websites, patents filing, press & media actions, videos, etc.	
DATA	Data sets, microdata, etc.	
DMP	Data management plan	
ETHICS	Deliverables related to ethics issues	
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OTHER	Software, technical diagram, algorithms, models, etc.	

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1 PROJECT ABSTRACT

The vision of **MODALSHIFT** lies in the creation of a transport network and traffic management optimisation framework, trusted and valuable for local stakeholders, that bridges the data from infrastructures, logistics and mobility operators.

New IoT devices - a smart box enabling Capacity-as-a-Service, and an e-subscription device for public transport access for people who are vulnerable to transport poverty, will increase the sources for data collection. A mobility data space, associated to novel geolocation data anonymisation, will be set up in the 3 Case Studies (Bulgaria, Italy, Spain) to ensure trusted and secure data exchange between data providers and users. This multisource data will enhance traffic state forecasting and increase the detection rate of events by 15%. On this basis, predictive and prescriptive analytics and synchromodality-based scenarios, tested in digital twins and early pilots, will identify optimal actions of transport stakeholders for adjusting their operations, towards a reduction of 25% of the interconnection or transshipment delays. This multisource data will enhance traffic state forecasting and increase the detection rate of events by 15%. On this basis, predictive and prescriptive analytics and synchromodality-based scenarios, tested in digital twins and early pilots, will identify optimal actions of transport stakeholders for adjusting their operations, towards a reduction of 25% of the interconnection or transshipment delays.

Agent-based modelling will identify how a modal shift towards low-carbon, active and shared mobility services can be acceptable by end-users and support a reshape of the public transport services and the use of urban space. A multimodal traffic management platform will orchestrate, upon the data space, the cooperation of stakeholders at network and multimodal hub scales. It enables the connection of dynamic optimisation algorithms to an operational drivers' tool for mobility operators, and of static models to a visual interface for transport planners. The determination of governance models, values for each stakeholder, dynamic pricing and business models, will steer the participation of 8 stakeholders for each Case Study in the multimodal traffic management system.

With this approach, MODALSHIFT stimulates new uses of the transport network to reduce traffic congestion for low-carbon and inclusive mobility, avoiding pernicious rebound effects.

2 EXECUTIVE SUMMARY

This deliverable presents the Stakeholders Engagement Plan, defining a structured approach to consistently involve local stakeholders across the MODALSHIFT Case Studies, ensuring their input shapes the project's development while reinforcing collaboration and maximising impact. The Stakeholders Engagement Plan for the MODALSHIFT project is a structured strategy to ensure consistent and meaningful engagement of local stakeholders including funded partners and other third parties interested in optimising mobility flows.

The engagement plan is composed of 3 steps: 1 Preliminary definition tasks, 2 Kick-off and ongoing engagement of stakeholders, and 3 Results' presentation and impact assessment activities. Each of these steps includes some dedicated actions for each of the case studies. Also, it identifies the need to harmonise requests for information from different partners across project phases into a coherent timeline, while addressing practical constraints such as travel budgets and the importance of engaging in local languages to reach wider audiences.

This plan is crucial not only to gather the insights needed to develop MODALSHIFT services to real local needs, but also to strengthen the collaborative spirit of this European initiative and ensure its long-term impact.

2.1 PURPOSE

The purpose of this engagement plan is to provide a clear framework for meaningful and sustainable interaction with local stakeholders. It builds on previous project experience (e.g., Tangent) and a framework developed by ID4M and has been refined in collaboration with project partners and local leaders. The plan aims to ensure that



engagement activities are targeted, efficient, and responsive to local needs, supporting the co-development and validation of MODALSHIFT services while strengthening cooperation among all actors

2.2 INTENDED AUDIENCE

Based on the content of this deliverable, it is primarily intended to be used internally. MODALSHIFT project partners will rely on it in all their activities aimed at reaching out to the local stakeholders (e.g. workshops, interviews, data collection, and demonstrations) throughout the lifetime of the project.

2.3 DESCRIPTION OF THE MAIN ACTIVITIES

In order to develop this engagement plan for local stakeholders, MODALSHIFT project partners have gathered several times to bring together their specific needs and ideas as well as their personal experience from previous projects. Through an iterative process and multiple meetings, a list of all stakeholder-linked activities has been established. This list has been transformed into a clear timeline guiding stakeholder-related activity throughout the project. It includes a first introduction and information-gathering phase, where local stakeholders get to know the project and share their thoughts on planned MODALSHIFT developments as well as on data governance issues (M5–M14). The second phase (M14–M25) will be dedicated to effective and transparent communication and involvement of local stakeholders to keep them engaged throughout the on-going developments. In the third and final phase (M25–M42), local stakeholders will discover the project's results and help assess its overall impact.

Possible risks during the early contact phase include stakeholder motivation and availability, data access and protection, and technical requirements for testing activities. Based on these reflections, several documents have been drafted to be used for stakeholders' contact (e.g. stakeholders' mapping, Non-Disclosure Agreement), available in the Annexes.

2.4 KEY RESULTS

- **Result 1: A shared approach, list of actions and timeline on how to involve local stakeholders in the MODALSHIFT project**
 - Allows for coherence in stakeholders' contact between different project partners and mitigates the risk of redundancy or double contacting of stakeholders, thereby building an effective collaborative relationship with stakeholders over time
 - Allows for continuous stakeholders' involvement throughout the duration of the project
 - Allows for effectiveness and best results in stakeholders' contact
 - Allows for prevention of problems in data access
- **Result 2: A strategic document (MS2) giving an overview of the three Case Study environments as well as the services and solutions to be developed (to be completed by M9)**

Allows for a clear working basis enabling a precise planning of developed solutions and services as well as of the testing activities.

2.5 RESEARCH AND IMPLICATIONS

A strong engagement of local stakeholders enables the MODALSHIFT project to develop solutions that are optimally adapted to the current context conditions, opportunities and challenges in the three Case Study environments (Trieste, Madrid, Varna) and achieve more precise results in testing its cooperative multimodal traffic management system. These results will ensure the success of the project and represent an important contribution to future research activities.



2.6 POLICY IMPLICATION

This deliverable's content does not have direct policy implications.

2.7 CONCLUSION

In conclusion, this deliverable determines the way local stakeholders from the three Case Study environments (Trieste, Madrid, Varna) are going to be approached and involved in the MODALSHIFT project. Their engagement will follow a three-step plan: Step 1 PRELIMINARY DEFINITION TASKS, Step 2 KICK-OFF & ONGOING ENGAGEMENT and Step 3 RESULTS PRESENTATION AND IMPACT ASSESSMENT. This engagement plan has been elaborated through the joint work of all MODALSHIFT project partners. This plan will ensure the relevance of the developed services and solutions; help carrying out high-quality testing activities and provide in-depth impact assessment thanks to the strong involvement of local stakeholders. Thus, this engagement plan is of great importance for the whole project.

3 ABBREVIATIONS

Table 1: List of abbreviations

Abbreviation	Definition
CINEA	European Climate, Environment and Infrastructure Executive Agency
CS	Case Study
UC	Use Case
WS	Workshop
SH	Stakeholder
IoT	Internet of Things
TRL	Technology readiness level
KPI	Key Performance Indicator
MoC	Memorandum of Cooperation
NDA	Non-Disclosure Agreement
GA	Grant Agreement
CM	Consortium meeting



4 INTRODUCTION

Engaging a wide range of different stakeholders in the improvement of traffic management is crucial to its sustainability and effectiveness. Impactful solutions especially related to data sharing need to actively involve the perspectives of different traffic participants in order to create holistic approaches proposing benefits to all of them. This is why the MODALSHIFT project emphasizes the creation of a solid bond with external stakeholders throughout the whole project duration. This bond and active stakeholders' engagement are going to be achieved by following a specific plan for stakeholders' engagement which will be detailed in this deliverable.

5 OBJECTIVES AND METHODOLOGY OF THE STAKEHOLDER ENGAGEMENT

In this context, the engagement of local stakeholders pursues two clear goals. On the one hand, it plays a crucial role in validating the main local traffic management difficulties in the three Case Study contexts and in tailoring MODALSHIFT solutions and services that effectively address stakeholders' problems. On the other hand, cooperation with local stakeholders is needed in order to have access to real local data that will be integrated into MODALSHIFT solutions and services.

Several factors need to be considered in the elaboration of the engagement method. The method needs to be strongly aligned with the project goals and has to consider the absolute importance of long-term involvement and data-sharing sustainability throughout the project.

The different WP leaders have been working collaboratively to propose a coherent timeline of actions in view of stakeholders' engagement (see section 5.4). This timeline of actions includes a certain number of meetings, interviews, workshops etc. making sure the project partners gather all the information they need without overburdening the local stakeholders.

As a result, different formats have been chosen for the project partners to engage with local stakeholders throughout the project. These formats are listed below together with their planned documentation and exploitation.

- **Presentation and feedback collection:** Structured sessions (e.g. project presentations, demos, or info meetings) where stakeholders are introduced to the latest MODALSHIFT activities and invited to provide immediate reactions or questions. Outcomes will be documented through written notes and exploited most importantly to determine who could be willing to participate in semi-structured interviews as well as in a joint impact assessment.
- **Semi-structured interviews:** One-on-one or small group conversations guided by a predefined set of open questions, designed to gather in-depth insights into stakeholder needs, challenges, and expectations. Outcomes will be documented through note-taking/ recorded and documented through automated transcription, then exploited through textual analysis for integration of stakeholders' feedback in improving MODALSHIFT technical developments.
- **Interactive workshops:** Participatory sessions with multiple stakeholders that combine presentations, group discussions, and co-creation exercises to generate shared understanding and practical solutions. Outcomes will be documented through note-taking and collaboratively elaborated written material, then exploited in improving MODALSHIFT technical developments as well as in governance recommendations.



Stakeholders will engage in these activities on different levels of engagement intensity depending on their personal willingness as well as on the degree to which their daily work is linked to the problems targeted by the MODALSHIFT project. Three different levels of stakeholders' engagement intensity are foreseen:

- **Advisory level:** Stakeholders willing to receive the latest conceptual outputs from the project and give their feedback
- **Data provision level:** Stakeholders willing to share data with the project partners based on bilateral contracts
- **Testing activities level:** Stakeholders willing to test the developed technical solutions and services and provide their feedback

Regardless of the intensity level that stakeholders choose to engage in the project, they are welcome to participate in all three engagement formats. The different activities proposed by the project partners and the engagement level chosen by external stakeholders are not to be seen in any correlation.

5.1 ALIGNMENT WITH MODALSHIFT METHODOLOGY AND OBJECTIVES

The methodology of stakeholder engagement is embedded in the general methodology of MODALSHIFT (cf. GA) which relies on 4 main dimensions. According to these 4 dimensions, the project will focus on Governance and Business models, Data space and interoperability, Algorithms and digital twins, as well as decision-making tools. In 5 consecutive steps, MODALSHIFT will fulfil its objectives:

1. Analyse and specify transport and traffic related challenges and needs in the three Case Studies
2. Develop IoT, data management, software and business innovations
3. Integrate multiple data sources and innovative solutions into one interoperable and cybersecure system
4. Test and validate the solutions based on collected data in the three Case Studies
5. Exploit results and outcomes through recommendations and strategies

This plan for engaging stakeholders will help achieve these objectives by:

1. Integrating real needs and struggles in service and solution development based on the information gathered from different external stakeholders.
2. Conducting high-quality testing of the developed services and solutions thanks to real-life data shared by external stakeholders;
3. Producing adapted business models and governance recommendations based on the insights gathered via the impact assessment and feedback from external stakeholders in the MODALSHIFT Case Studies.



5.2 STAKEHOLDERS' ENGAGEMENT PRINCIPLES

Incorporated in the general MODALSHIFT methodology, the stakeholder engagement will follow 4 core principles:

- **Transparency:** Stakeholders need to be completely aware of what the project is going to work on, the ways in which their input will influence this work, and how their data are going to be used in the project.
- **Mutual benefits:** Stakeholders' engagement will be stimulated by offering benefits relevant to the stakeholders (e.g. in terms of information, contacts etc.).
- **Long-term collaboration:** In order to keep stakeholders engaged from the beginning of the project through to its finalization, regular updates through transparent communication and dynamic participation incentives will be offered, such as guided tours through the different Use Case sites, tailored training or demonstration sessions as well as the possibility to test the services and solutions developed throughout the project or even enhanced visibility offered to stakeholders by including them in the project's communication campaign.
- **Data protection & confidentiality:** Stakeholders' data need to be handled and used under strict confidentiality and cybersecurity conditions (e.g. through agreements, contracts, anonymization techniques, etc.).

5.3 JOINT ELABORATION OF STAKEHOLDERS' ENGAGEMENT PLAN

Based on the different project partners' needs in terms of information from external stakeholders, this engagement plan has been elaborated in close cooperation with several project partners. Especially AIT, ITA, ID4M and NGS will need specific stakeholder feedback to work on MODALSHIFT tasks referring e.g. to the agent-based modelling tool, the data management framework or the preparation of specific testing activities. Through several concept meetings between the project partners, a consolidated and chronological plan of stakeholders' activities has been established.

A second part of the stakeholders' involvement preparation has been performed through the collaboration of ID4M and the three Case Study partners: AVANZA, ADF and VARNA. A precise description of the current Case Study characteristics and difficulties was necessary to sketch the status quo in the three Case Studies which will be completed and extended thanks to external stakeholders' feedback.



Local stakeholders' contacts

WS: Workshop
SH: Stakeholder
CS: Case study

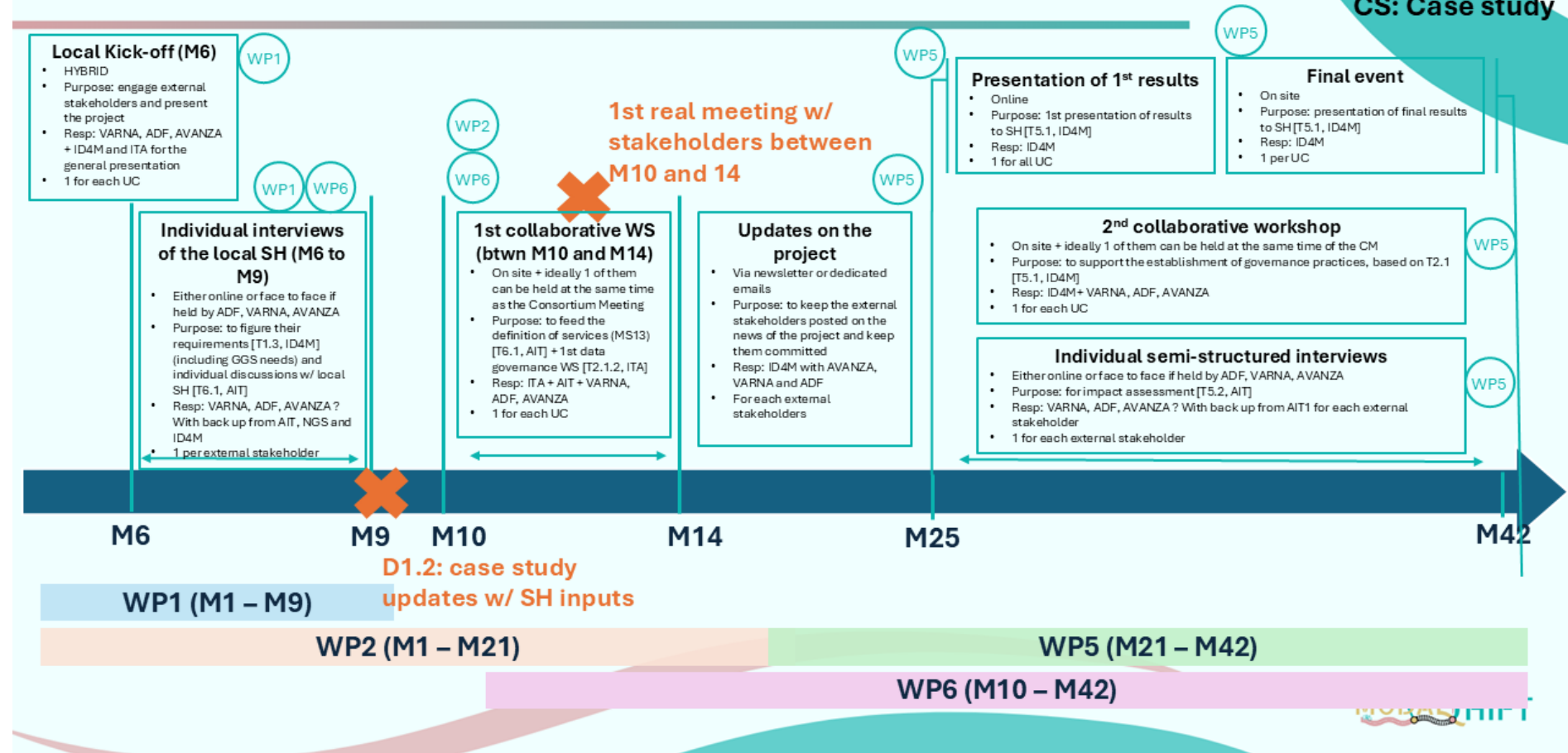


Figure 1: Timeline of stakeholders' engagement plan

6 DETAILED STEP-BY-STEP ENGAGEMENT PLAN

6.1 STEP 1: PRELIMINARY DEFINITION TASKS: PREPARATION OF THE STAKEHOLDER'S ENGAGEMENT

[M1-M9]

The first step of the engagement plan consists of preliminary definition tasks to prepare the field of the stakeholders' involvement throughout the whole project. These definition tasks are fulfilled especially in cooperation with MODALSHIFT project partners representing the three Case Studies (VARNA, AVANZA, ADF) in order to include the most precise information possible. The actions that are performed are the following:

- Stakeholders' mapping
- Listing and categorisation of data sources
- Co-creation of legal and administrative templates
- Consolidated definition of Use Cases, scenarios and KPIs

6.1.1 STAKEHOLDERS' MAPPING [M1-M4]

- **Objective:** As part of *WP1 Task 1.1: Plan for engaging data providing stakeholders*, the goal is to map the ecosystem of each Case Study by listing the local stakeholders in relation with the Use Cases, sorting them by various categories, and identifying their level of involvement and if they can potentially be data providers for the project.
- **Methodology:** The stakeholders' mapping task consists of two activities. As a first step, the stakeholders' mapping has been started with one workshop per Case Study during the general Kick-off meeting of the MODALSHIFT project in Brussels on June 12th 2025. One workshop was held per Case Study to understand how stakeholders and project partners involved in Case studies are connected as well as to start identification of additional local data-providing stakeholders. The partners were dispatched into several groups, and the workshops were led by ID4M and GGI. The agenda of the workshop can be found in the Annex section 11.2. Due to organisational issues, none of the VARNA partners were able to attend the Kick-Off meeting in Brussels. In order to ensure nonetheless the uniformity of the different Case Studies' progress, an online workshop between ID4M and VARNA has been organised on July 2nd 2025 in order to start listing external stakeholders from the Varna municipality Case Study environment. As a second step, in order to feed the mapping continuously after the workshops, the Case Studies' partners have continued filling in the list of the stakeholders, using the table as well as the value chain templates created for this purpose.
- **Tools:** A document was created at the beginning of the project, inspired by previous projects such as H2020 TANGENT and HE DECARBOMILE, to list and sort the local stakeholders. The template of this document is in the Annex section 11.3. This document helps to reach two objectives:
 - o Gather contact information about the stakeholders (category of the organisation, name, email address, telephone number of the contact)
 - o Identify the potential of involvement of the stakeholders: are they easily reachable? Is their involvement in the Case Study valuable for them and for the project?

For GDPR reasons we only included the empty template in this public document. However, a large number of external stakeholders have already been identified (see below).

Additionally, templates based on the three Case Studies' different value chains will be used to detect complementary stakeholders and to understand possible links between identified stakeholders. The template can be found in the Annex section 11.4.

- **Outputs:** at M4 there is a consolidated list of the local stakeholders for the 3 Case Studies, with a first overview of their engagement levels. The following different stakeholder types are included in the completed mapping (see categories in first column of the stakeholders' mapping document):

Table 2: Overview of the number of stakeholders identified per type in Varna, Madrid and Trieste

Stakeholder category	Varna	Madrid	Trieste	Total
Public transport operators	4	3	1	8
Private transport operators	10	3	5	18
Service providers	0	12	5	17
Logistics operators	0	4	13	17
Local authorities	3	5	4	12
Federations/ Associations	2	2	4	8
Educational Institutions and universities	0	1	2	3
Total	19	30	34	83

- The main activities of the stakeholders' mapping have been carried out from M1 to M4, but as an ecosystem is always in motion, the mapping will be updated regularly for the duration of the project.

The status quo of the mapping at M4 shows a relatively balanced split of different stakeholder types in the three Case Study environments. Nevertheless, some imbalances can be noticed due to different factors:

- **Municipality of Varna Case Study:** The fact that educational institutions, service providers and logistics operators are unrepresented is reflecting the need to complete stakeholders on those areas as they appear not to be connected to the rest of the ecosystem so far.
- **Estación Sur in Madrid Case Study:** The relatively high number of service providers is linked to the Case Study's characteristics as mobility hub where many different mobility stakeholders work together.
- **Port of Trieste Case Study:** The relatively high number of logistics operators and the low number of public transport operators are due to the logistics' focus of the Case Study.

6.1.2 LISTING AND CATEGORISATION OF DATA SOURCES [M1-M4]

- **Objective:** As part of *WP1 Task 1.2: Identification, collection and analysis of the locally available data*, the goal is to identify, list and categorise the existing and potential data sources relevant to each Case Study (CS), distinguishing between openly available data, partner-owned data, and external data requiring access agreements.
- **Methodology:** Each CS partner, in collaboration with technical partners, compiles an inventory of available datasets. This includes a review of open data portals, internal databases, and datasets

potentially held by mapped stakeholders. Datasets are categorised and prioritized according to four main parameters: data relevance regarding the MODALSHIFT objectives, data

up-to-dateness, good data quality and the available level of data detail. In the following, they are described regarding their data sources and formats.

- **Tools:**
 - A standardised and generic data catalogue is first built. It categorises data by theme in order to cover each CS on mobility of persons and goods.
 - An easy to fill document or online survey is then built for helping CS partners and stakeholders to describe known data sources. An iterative methodology is applied in order to progressively build a detailed list aligned with the needs of the CS.
- **Output:**
 - By M4 a first version the generic data catalogue.
 - By M9 an update of the data catalogue and a list of known data sources from CS partners and stakeholders.

6.1.3 CO-CREATION OF LEGAL TEMPLATES [M1-M4]

- **Objective:** As part of *WP1 Task 1.1: Plan for engaging data providing stakeholders*, the goal is to design appropriate legal instruments (e.g. NDAs, MoCs) to formalise data sharing agreements between local stakeholders and the project, according to identified needs and data sensitivity levels.
- **Methodology:** First versions of templates of Memorandum of Cooperation (MoC) and Non-Disclosure Agreement (NDA) are produced. A template of the NDA can be found in the Annex section 11.5. Once the stakeholders' mapping is finished and initial interviews have been conducted, project partners identify which formal stakeholders' agreements for data sharing are required. The first template drafts are then adapted based on EU best practices and GDPR compliance. Legal experts support the co-creation process during bilateral exchanges or workshops.
- **Tools:** Standardised templates for NDA and MoC, which were adapted from H2020 TANGENT, with flexibility for local legal specificities. Shared through a document repository and reviewed by partners.
- **Output:** By M4: Draft NDA and MoC templates finalised and shared with CS partners. Templates will be adjusted as needed in future exchanges with stakeholders.

The type of document signed with the stakeholders might imply a more or less strong engagement. A signed contract instead of a MoC might be found as more binding by the stakeholders. A discussion on that notion linked to Reward Mechanisms for Data sharing (6.2.4.) will be held at the beginning of T6.1 on M10.

6.1.4 CONSOLIDATED DEFINITION OF USE CASES, SCENARIOS AND KPIS [M8-M9]

- **Objective:** As part of *WP1 Task 1.3: Definition of the targets and use cases*, the goal is to refine Use Case descriptions, target scenarios and associated KPIs for each CS by integrating stakeholder inputs and aligning with local priorities and MODALSHIFT's overall goals.
- **Methodology:** By M4, ID4M will work together with Case Study partners to draft initial Use Cases' descriptions and with technical partners to describe the services that will be developed during the project. Both description types are to be found in V1 Strategic Document, related to MS2.



From M5 to M9, the descriptions will be refined based on stakeholder workshops and interviews, and KPIs will be co-selected to reflect local impact priorities. The 1st version of the Strategic Document will be updated and completed with additional information in order to draft the D1.2 for M9.

- **Tools:**
 - Use Case templates, KPI matrix, shared documents, meetings, collaborative online tools, interview and workshop results
- **Output:**
 - By M4: a 1st version of the set of Use Cases and services & solutions to be tested
 - By M9: based on the interviews that have been conducted with local stakeholders by ID4M and the CS partners, a validated set of the Use Cases as well as validated services & solutions (to be tested in each Case Study linked to a set of KPIs) will be elaborated and gathered in the 2nd version of the Strategic Document (initially MS2) to be submitted as deliverable D1.2 at M9

6.2 STEP 2: KICK-OFF & ONGOING ENGAGEMENT

[M5-M21]

The second step of the engagement plan includes the actual beginning of stakeholders' involvement by organizing first MODALSHIFT presentation events and building a solid relationship with stakeholders wanting to be actively engaged in the project. The division and chronology of the different engagement activities have been elaborated through multiple exchanges between MODALSHIFT project partners (especially between ID4M, AIT, ITA and NGS) to make sure that every partner's needs are met without over-contacting the stakeholders. The actions that are performed are the following:

- Local stakeholders' kick-off meetings
- Semi-structured interviews
- Thematic workshops
- Reward mechanisms for data sharing
- Regular follow-up and communication strategy

6.2.1 LOCAL STAKEHOLDERS' KICK-OFF MEETING [M5-M6]

- **Objective:** As part of *WP1 Task 1.1: Plan for engaging data providing stakeholders*, the goal is to present MODALSHIFT's goals and approach to local stakeholders, establish engagement expectations, initiate formal collaboration for the duration of the project and understand who could be reached out to for conducting individual interviews.
- **Methodology:** For each Case Study, a local kick-off meeting will be organised with stakeholders identified during the preliminary mapping phase. These meetings include a first project presentation, a Q&A session, and breakout discussions to align expectations and roles. The kick-off sessions are hybrid: ID4M and ITA will join the meeting online for the general presentation of the project, CS partners and local additional stakeholders will be on-site. The CS partners will be coached and given any material for the preparation of the workshops by ID4M.
- **Tools:**
 - Slide decks, meeting agendas, sign-in sheets, and feedback forms tailored per CS.

- Online participation options might be provided to maximise accessibility, but with a preference for on-site participation for a strong involvement.
- **Output:** By M6:
 - Completed meetings in each CS with follow-up interest statements from stakeholders.
 - Identification of the most relevant and motivated stakeholders to be involved in the project, and/or interviewed during the next step.
 - Co-decision of the communication modes & frequency during the project, between the local stakeholders and the partners (e.g.: 1 online meeting every 6 month to present the progress of the project and gather stakeholders' feedback, invite stakeholders to the Advisory and Replication Board meetings and include their feedback, 3 dedicated newsletters per year, a dedicated collaborative tool, etc.).

6.2.2 SEMI-STRUCTURED INTERVIEWS [M6-M9]

- **Objective:** As part of *WP1 Task 1.3: Definition of the targets and use cases*, the goal is to gather in-depth qualitative insights from stakeholders about their challenges, data assets, and how MODALSHIFT solutions could benefit them.
- **Methodology:** Semi-structured interviews are conducted using a predefined guide with thematic sections (e.g. ecosystem, challenges, data, expectations, long-term involvement), that has been elaborated in collaboration with the other project partners including ITA, NGS and AIT as they need to gather specific feedback elements from the local stakeholders as well. Interviews are conducted in person or online (by CS partners or by ID4M), and responses are recorded, documented and synthesised. In order to be able to compare the interview results, all participants will answer the same predefined questions. The different information and data communicated during the interviews will be harmonized in order to validate their coherence.
- **Tools:**
 - Interview guidelines and interactive tools
- **Output:** By M9:
 - Interviews completed with at least one representative from each identified stakeholder type for each UC.
 - Synthesised summaries for the refinement of Use Cases and data strategy.

6.2.3 THEMATIC WORKSHOPS [M11-M14]

- **Objective:** As part of *WP2 Task 2.1: Data management and governance* as well as *WP6 Task 6.1: Determination of value for data providers*, the goal is to co-create knowledge and practical solutions with stakeholders around key enablers of data sharing and service sustainability: governance models, data licensing, and business approaches.
- **Methodology:** 3 thematic on-site workshops on the definition of services as well as on data governance topics will be designed and held jointly by AIT and ITA between M10 and M14 as interactive co-creation sessions involving local authorities, transport operators (passenger and freight), data providers, and relevant user representatives. Each workshop will focus on a specific theme (e.g., governance frameworks, business models, data-sharing practices) and will combine short expert inputs with facilitated group work to capture diverse perspectives. At least one of these workshops should ideally take place jointly with a Consortium meeting in order to limit the number of travels. Workshops will follow a structured process:

- Introduction of the thematic focus and relevant MODALSHIFT objectives.
- Breakout group discussions guided by targeted questions and templates.
- Synthesis of insights into draft recommendations.

Outcomes will be fed back to stakeholders for validation to ensure accuracy and ownership of results.

- **Tools:** Workshop templates (canvas boards, digital whiteboards, etc.), discussion guides, and synthesis templates for capturing key inputs. Where possible, hybrid tools will be used to enable participation across countries and stakeholder types.
- **Output:** Consolidated workshop reports capturing key enablers, barriers, and stakeholder-informed recommendations on governance, data licensing, and business approaches. Insights will directly inform WP2 (data governance) and WP6 (business models).

6.2.4 REWARD MECHANISMS FOR DATA SHARING [M10-M16]

- **Objective:** As part of *WP6 Task 6.1: Determination of value for data providers*, the goal is to design and propose mechanisms that motivate local stakeholders to share their data, tailored to their needs and constraints.
- **Methodology:** Insights from interviews and workshops are used to define potential incentives (e.g. analytics access, visibility, benchmarking). Stakeholders are invited to select preferred options during follow-ups. In relation with the legal and administrative documents, consideration will be given to the implementation of some contracts, as a complement or replacement to NDAs and MoCs, to further involve the stakeholders and in return to ensure that this involvement provides them added value. The approach will follow an iterative cycle: identification of incentive options → discussion and testing with stakeholders during thematic workshops → refinement based on feedback and feasibility assessments. AIT will lead the integration of these mechanisms into WP6 business model activities.
- **Tools:**
 - Reward catalogue table (by stakeholder type), Use-Case-based incentive cards, and MoC annexes outlining agreed benefits
 - Digital survey tools may also be applied to gather preferences at scale and ensure inclusivity.
- **Output:** By M16:
 - Initial reward models proposed for each CS and embedded into the data-sharing strategy and legal templates.
 - Recommendations will be validated with stakeholders to ensure they are realistic, attractive, and aligned with long-term sustainability of services.

6.2.5 REGULAR FOLLOW-UP AND COMMUNICATION STRATEGY [M7-M21]

- **Objective:** As part of *WP5 Task 5.1: Coordination of early pilot activities and operational data collection*, the goal is to maintain stakeholder engagement through consistent, transparent, and value-driven communication throughout the project.
- **Methodology:** According to the meeting frequency and modality decided during the first meeting, with the support of ID4M, the CS partners will define and apply a light-touch stakeholder engagement plan including regular bilateral follow-ups, joint activities, and participation in



project updates as well as moments where stakeholders' feedback is continuously gathered. For example, there could be online "Morning coffee Meetings" every 2 months between M14 and M25 where stakeholders are briefly informed about the project's current status by ID4M and the CS partners and get to ask specific questions or express remarks on the project progress. In addition to that, the MODALSHIFT Instagram account as well as the project's general Newsletter mailings are going to regularly provide information on the project. Consequently, stakeholders will continue to be involved over the course of the project, have early access to interesting information and get the opportunity to express their opinion on the developments as well as prepare for the assessment phase. Communication materials are translated and provided to CS partners as needed. Additionally, local stakeholders will also be invited to the ARB meetings.

- **Tools:**
 - o Stakeholders contact list, documentation updates (e.g. newsletters), workshops invitation, interactive & collaborative tools for online meetings
- **Output:**
 - o Continuous engagement documented through contact logs and participation records
 - o Mid-project satisfaction surveys planned

6.3 STEP 3: RESULTS PRESENTATION AND IMPACT ASSESSMENT ACTIVITIES

[M21-M42]

6.3.1 PRESENTATION OF THE RESULTS AND FEEDBACK COLLECTION [M21-M42]

- **Objective:** As part of *WP5 Task 5.1: Coordination of early pilot activities and operational data collection*, the goal is to share the results of the MODALSHIFT tools, simulations, and pilots with local stakeholders and collect structured feedback to evaluate usability, value, and alignment with their operational and strategic needs.
- **Methodology:** The project's early results will be presented to the technical personnel of each local stakeholder organisation involved since WP1 (M25). Data space connectors will be continuously collected and deployed in order to access advanced data. A second round of 3 collaborative on-site workshops (one in each Case Study environment) will be steered by ID4M and CS partners from M25 until the end of the project in order to support the establishment of governance practices. These workshops will include simulations, dashboards, and early deployment outcomes. Stakeholders are invited to review, comment, and prioritise improvements. Sessions are interactive and include Q&A and co-evaluation exercises. Individual online semi-structured interviews for impact assessment will be steered by AIT and CS partners. Finally, a series of 3 closing events, one with each Case Study, is going to highlight results and outcomes from the MODALSHIFT analyses.
- **Tools:**
 - o Tailored designs for presenting results and for local communication on the project (from EQY)
 - o Demonstration of tools (dashboards, scenario outputs, KPIs)

- Access to some of the services for self-demonstration (e.g. with specific profile and credentials)
- Structured feedback forms, extending TANGENT methodology, Evaluation scorecards or Likert-scale grids
- Discussion guides to facilitate focus groups or post-demo reflections
- **Output:**
 - Stakeholders actively involved in testing activities and assisting the several demonstrations
 - Several rounds of feedback (initial feedback at M25, and then until the end of the project)
 - 5 stakeholders per Case Study committed to share their high-quality data and use data space connectors by M28

6.3.2 IMPACT ASSESSMENT [M21-M42]

- **Objective:** As part of *WP5 Task 5.2: Qualitative and quantitative impact assessment*, the goal is to assess the impact of the solutions developed in MODALSHIFT on each CS, for the stakeholders, based on KPIs co-defined earlier in the project, and understand the systemic, economic, environmental, and social implications. Evaluate the Societal Readiness Level of the mobility/freight services that show the most positive impact.
- **Methodology:** Semi-structured online interviews with local stakeholders will be combined with quantitative monitoring of KPIs co-defined in earlier phases. Comparative analysis will be carried out across the different Case Studies to identify transferable insights. Impact will be assessed at multiple levels:
 - Systemic (integration of freight and passenger mobility, interoperability of data)
 - Economic (efficiency gains, cost-benefit for operators and authorities)
 - Environmental (emission reductions, energy savings)
 - Social (inclusivity, accessibility, user acceptance, employment impacts).
 - The Societal Readiness Level methodology will be applied to assess maturity and scalability of solutions.
- **Tools:**
 - KPI monitoring frameworks, impact evaluation template derived from EU best practices, and stakeholder validation survey or interview guide
 - Data visualisation tools may be used to communicate results back to stakeholders and policymakers in an accessible way.
 - Qualitative data analysis tools may be used to analyse the semi-structured interviews.
- **Output:**
 - Strategies for local public authorities for the development of mobility/logistics services, helping the modal shift towards active, decarbonised and inclusive mobility modes.
 - Additionally, a comparative cross-Case Study assessment will highlight success factors and barriers for replication in other European contexts.

7 TIMELINE & MILESTONES

In this section, the project's timeline as well as stakeholder-related milestones are going to be listed and explained.

- **M6:** Local kick-offs in 3 Case Study environments in order to start stakeholder engagement
- **M6 – M9:** Individual interviews with local stakeholders from the 3 Case Study environments in order to check if their real needs match the solutions and services that are going to be developed in the MODALSHIFT project and to find stakeholders able to share their data for the MODALSHIFT testing activities
- **M10 – M14:** 1st Collaborative workshops with local stakeholders to feed the definition of the services and solutions that will be developed
- **M14 – M25:** Local stakeholders will get regular updates on the project (via newsletters or dedicated emails) to assure their engagement throughout the course of the project. The precise stakeholders' activities throughout this project phase will be planned and explained more in detail later on in the project.
- **M25 – M42:** Presentation of the first project results to local stakeholders, 2nd collaborative workshop with local stakeholders in order to support establishment of governance practices, individual semi-structures interviews for impact assessment, final event with presentation of the final results. The precise stakeholders' activities throughout this project phase will be planned and explained more in detail later in the project.
-

Milestone 2 (MS2) on initial service design scenarios and Use Cases will be reached at M4.

The MS2 results will be completed by M9 thanks to information resulting from the individual interviews conducted between M5 and M9.

8 RISKS MANAGEMENT

This section describes the risks the project could face regarding the stakeholders' engagement. Some of the risks were already identified and are from the description of the actions, some others, more specific, were identified later. The following matrix gives an overview of these risks.

Table 3: Risks and mitigation measures for stakeholder engagement in MODALSHIFT

Risk description	Mitigation measures
Difficulty to recruit local data providing stakeholders	Based on the multiple experiences of project partners, the plan for engaging data providers (D1.1) is meant to facilitate early discussions and an iterative process that fosters confidence and interest of local stakeholders to participate in the project activities. The collaborative discussions with the WP leaders to plan the interactions with the stakeholders during the project allow to propose a clever schedule with relevant content and with a decent frequency. Particularly, the 1st Case Study KO meetings will allow to directly involve the stakeholder, with also the interest to meet their peers.



	In case there are limited participants engaged during the first year, the determined value (T6.1) and business interest (T6.2) of participating in a multimodal traffic and network management system will be valuable elements to recruit and complete the pool of stakeholders if needed.
Delay or lacks in the provision of data by local partners/stakeholders	In-depth discussions between data users (technical) and providers (local) partners have already paved the way for a smooth data collection process both from local partners' departments handling data, and from stakeholders. Trust will be carefully built with these stakeholders (anonymisation, results, etc) to mitigate the probability of this risk materialising. Furthermore, clear frameworks will be proposed: NDA, MoC, but also some contracts to ensure the added value to share data for the stakeholders will be studied. Still, if the situation happens, partners will use lower sensitivity data and available open data, completed with augmentation techniques and other adapted datasets, for performing tests and simulations.
Technical solutions are not compatible with local contexts (social, regulatory etc.)	The main regulatory incompatibilities that could hamper project activities might concern data collection and management, but partners will have strict GDPR, and data privacy/security guidance based on EU and national regulations. While MODALSHIFT targets TRL5 with early testing that will mostly lead to simulations and decision-making support of stakeholders, policy recommendations will also be issued toward upscale of results. One of the objectives of the first meetings with the local stakeholders is to identify their local context, including the tools, systems and standards they are using, and to understand their regulatory and social challenges to propose services that match their local situation as closely as possible.
Loss of interest over time: Initially engaged stakeholders may disengage as the project progresses, especially if they see no short-term value	Maintain engagement through regular updates, visible impact of their input, invitations to co-design activities, and recognition of contributions. The frequency and the ways to communicate and meet will be decided with them, and a mid-project study will be done to understand their satisfaction.
Language or communication barriers	Translate key documents, use simple and visual communication formats. Adapt language during interview and workshops with the support of the local Case Study leaders.



9 CONCLUSION

The Stakeholders Engagement Plan summarises the key learnings from preparing the Stakeholders Engagement Plan, outlines the next steps for its implementation, and highlights how these insights can guide future stakeholder engagement strategies both within MODALSHIFT and beyond. The preparation of this Stakeholders Engagement Plan has highlighted the importance of having a clear, shared, and well-balanced approach, allowing sufficient time to organise meetings and local events in a structured way.

A coherent timeline, agreed by all partners, is key to ensuring both relevance and effective stakeholder participation this provides a practical roadmap for planning activities. Looking ahead, the next priority is to implement this plan by organising the upcoming local kick-off events, ensuring the engagement of key stakeholders in each Case Study. Stakeholders will be prioritized through their declared interest to the project but also on the datasets they could provide for the project and defined as critical for the development of the services during the project. A key challenge will be managing hybrid meetings that combine in-person and online participation, while maintaining quality interaction. A key challenge will be managing hybrid meetings that combine in-person and online participation, while maintaining quality interaction.

To address this, the PDCA (Plan–Do–Check–Act) approach will be applied to regularly review the plan’s relevance and adapt it as needed, particularly during the testing phase. For future decision-making, this process underlines the need for a balanced engagement strategy combining both local and global contacts, ensuring strong commitment from local partners, and clearly communicating the value that MODALSHIFT offers stakeholders. With templates, tools, and processes now prepared, the focus will shift to smooth implementation and generating outputs that are both actionable and relevant for the project’s success and legacy.

The success of the MODALSHIFT Stakeholders Engagement Plan will rest on continuous adaptation, strong local collaboration, and a clear focus on delivering tangible value to stakeholders ensuring that engagement becomes a lasting strength of the project and a model for future initiatives.

10 REFERENCES

None

11 ANNEXES

11.1 LIST OF PROJECT PARTNERS ACRONYMS

ITA	Technological Institute of Aragon
ATOBÉ	A-to-Be - MOBILITY TECHNOLOGY SA
AIT	Austrian Institute of Technology
ID4M	ID4Mobility
KEDGE	KEDGE Business School
GGI	GeneGIS GI
IMEC	Interuniversitair Micro-Electronica Centrum
TELLAE	Tellae
NGS	New Generation Sensors
OCTO	Octopize Mimethik Data - Big Data Santé
UTAC	UTAC France
ADF	Adriafer S.R.L
VARNA	Varna Municipality
AVANZA	Avanza Spain S.L.
EQY	Euroquality SAS
INNOVEE	InnovÉE - Innovation en énergie électrique
PNAEAS	Port Network Authority of the Eastern Adriatic Sea

11.2 WORKSHOP AGENDA KICK-OFF MEETING BRUSSELS

On the project's kick-off meeting day on June 12th 2025, two workshops have been performed for the Case Studies "Port of Trieste" and "Estación Sur" to start the stakeholders' mapping together with all kick-off participants. The workshop's agenda was the following:

- 3:45 – 3:50** Welcome and warm-up with participants
- 3:50 – 4:00** Workshop explanation, group preparation and instructions
- 4:00 – 4:20** Part 1: Participants list individually different stakeholders on post-its, then attach them on a paperboard and exchange
- 4:20- 4:35** Part 2: Attach post-its on value chain template drafted for each Case Study environment, adding new stakeholders if relevant
- 4:35-4:45** Agree on the results and provide transparency over next steps

A second workshop has been performed remotely referring to the "Varna municipality".



11.3 STAKEHOLDERS' MAPPING

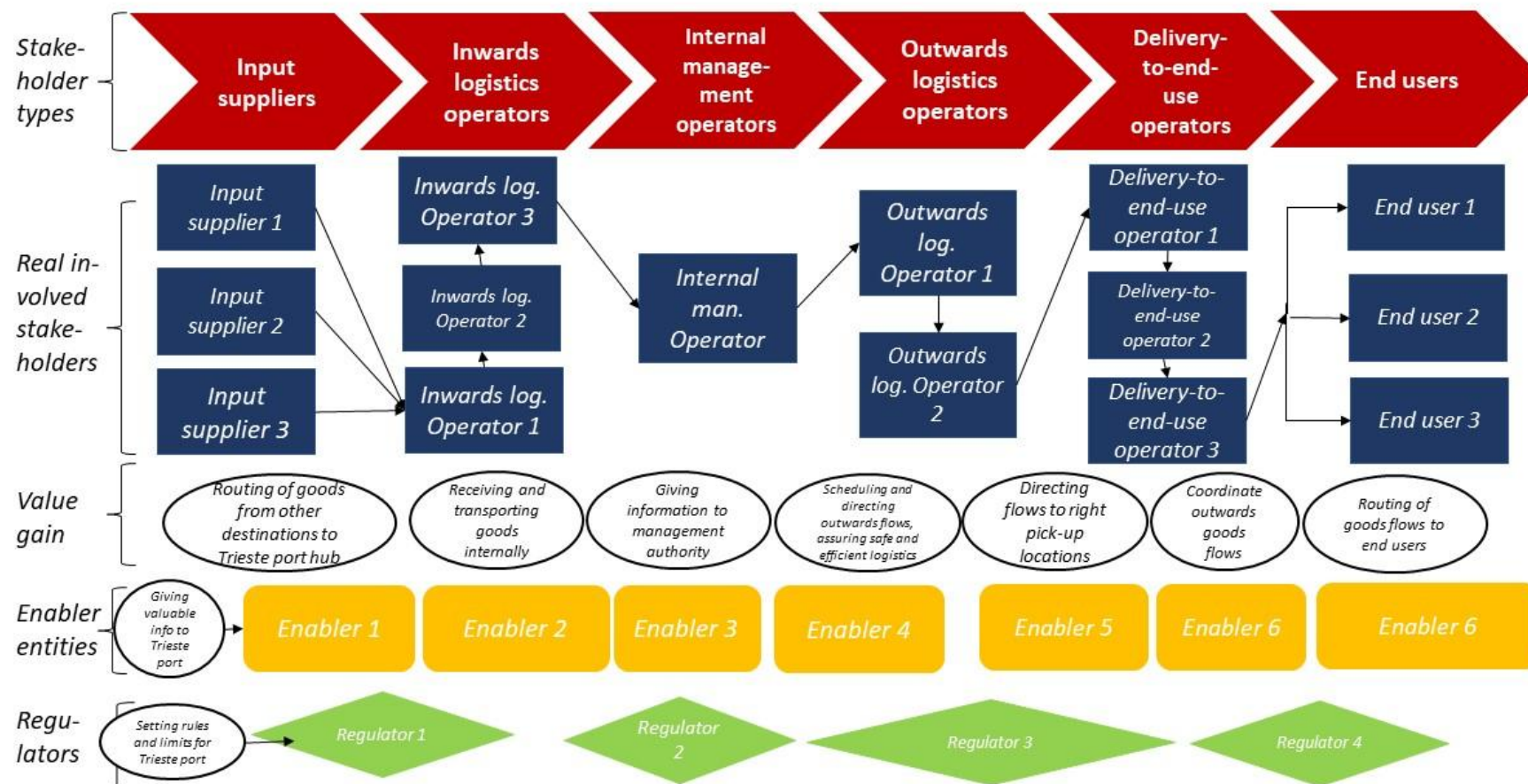
Port of Trieste				Contact Information			Have access / easily reachable	Value to Case study & project	Stakeholder engagement level	Stakeholder actively involved level	Occurred engagement problems	Additional Comments
Category	Sub-category	Stakeholder name	Website	Name	Email address	Phone number	Score from 1-5	Score from 1-5	Score from 0-3			
							(1 = not easy to reach, 5 = very easy to reach)	(1 = low, 5 = high relevance/value)	(0=no engagement, 1= low engagement, 2=moderate engagement, 3= high engagement)	actively involved RANKING		
Please select one category of actors among the lists. If not on the list, select Other and add precisions in the next column	Add precisions if needed	Please provide full name of the stakeholder as well as their acronym (if they have one). Please include names here rather than generalisations, e.g., "General public", as we need to be able to potentially engage the stakeholder and we won't be able to do so if the stakeholder is too vague. The generalisation is already within the category or sub-category. Please give each new stakeholder a separate line,	Insert a link to the website for the stakeholder	Please provide the contact name for the stakeholder	email address of the contact(s)	If so, include the telephone number (please remember your country code if so)	How easily will you be able to contact this stakeholder?	What value has the stakeholder for the use case? How relevant is the stakeholder for the project?	How is the current engagement level of the stakeholder? Please update the list at least once a month.		Are you experiencing difficulties engaging with your stakeholder? Can you try to narrow down the problem your experiencing based on the categories?	



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11.4 EXAMPLE CASE STUDY VALUE CHAIN TEMPLATE

Value Chain - Port of Trieste Use Case





11.5 NON-DISCLOSURE AGREEMENT AND MEMORANDUM OF COOPERATION

NON-DISCLOSURE AGREEMENT

THIS AGREEMENT is made between the parties listed below on the date of the last signature set out below:

1. LEGAL NAME OF ENTITY, with VAT number [VAT number], organized under the laws of [country], established in [address], duly represented by [Name of legal representative and Position],
2. LEGAL NAME OF ENTITY, with VAT number [VAT number], organized under the laws of [country], established in [address], duly represented by [Name of legal representative and Position],

Individually referred to as a Party or collectively as the Parties.

For the purposes of this Agreement, the Party which discloses Confidential Information within the terms established hereunder to the other Party shall be regarded as the Disclosing Party. Likewise, the Party which receives the disclosed Confidential Information shall be regarded as the Receiving Party.

WHEREAS:

The Parties hereto desire to [exchange and share information under the auspices of the MODALSHIFT project (EU funded Horizon Europe project with GA XXX) and wish to protect certain confidential information (the “Confidential Information”) which may be disclosed between them for the purpose of facilitating collaboration scenarios, test cases and pilot applications.] (the Purpose)

The Parties have decided to disclose to each other confidential information for the Purpose and accordingly the Parties agree to ensure such information is treated as confidential and protected in accordance with the terms of this Agreement.

The Parties hereto agree as follows

1 Confidential Information

- 1.1 For the purposes of this Agreement Confidential Information means all information in whatever form or mode of communication, which is disclosed by a Party (the “Disclosing Party”) to any other Party (the “Recipient”) in connection with the Project during its implementation and which has been explicitly marked as “confidential” at the time of disclosure, or when disclosed orally or other intangible form has been identified as confidential at the time of disclosure and has been confirmed and designated in writing within 15 working days from oral or intangible disclosure at the latest as confidential information by the Disclosing.
- 1.2 Limits on Confidential Information. Confidential Information shall not be deemed confidential, and the Receiving Party shall have no obligation with respect to such information where the information:
 - i. was known to the Receiving Party prior to receipt of the Confidential Information from the Disclosing Party.
 - ii. is independently developed by the Receiving Party without reference to or use of the Confidential Information.
 - iii. was or becomes publicly available through no breach of this Agreement of the Receiving Party.
 - iv. is disclosed to the Receiving Party by a third party who to the best knowledge of the Receiving Party is in lawful possession thereof and under no obligation of confidence to the Disclosing Party; or
 - v. is approved for release upon the Disclosing Party’s written permission.



- vi. the Receiving Party is required to disclose the Confidential Information in order to comply with applicable laws or regulations or with a court or administrative order, subject to the provision further detailed hereunder.

2 Term, Disclosure and Use of Confidential Information

- 2.1 This Agreement is in force from the date of last signature. The provisions of this Agreement shall remain in full force and effect notwithstanding completion of the Purpose for a period of five (5) years after termination of this Agreement.
- 2.2 The Receiving Party agrees to:
 - (a) only use the Confidential Information for the Purpose and for no other purpose.
 - (b) protect the security and confidential nature of the Confidential Information with the same degree of care as it accords to its own Confidential Information.
 - (c) not, without prior written consent, make any notes or copies of any kind of any part of the Confidential Information, except where reasonably necessary for the Purpose in which case such notes and copies shall be regarded as Confidential Information.
 - (d) not communicate or otherwise make available the Confidential Information to any third party without a prior written authorisation from the Disclosing Party, stating the terms, limits and purpose of the disclosure.
 - (e) not disclose the nature, purpose or existence of this Agreement (except as necessary to enforce its terms); and if required by law or by a court or a regulatory authority to disclose any Confidential Information, it shall notify promptly the Disclosing Party of the terms of such disclosure and will collaborate to the extent practicable with the Disclosing Party in order to comply with the order and preserve the confidentiality of the Confidential Information.
- 2.4 The Receiving Party shall be permitted to disclose Confidential Information to its employees, representatives or agents who need to have access to the Confidential Information for the Purpose. Provided that they are subject, either by law or by contract, to confidentiality obligations comparable to those set out in this Agreement. Each Party will be liable for its employees' and/or representatives' or agents' strict observance of confidentiality obligations.

3 Return of Confidential Information

- 3.1 The Receiving Party will, upon termination of this Agreement or upon the Disclosing Party's written request at any time, immediately cease using the Confidential Information and promptly return or destroy the Confidential Information and any copy thereof within 15 days and confirm this to the Disclosing Party in writing. The Recipients may keep a copy to the extent it is required to keep, archive or store such Confidential Information because of compliance with applicable laws and regulations or to perform this Agreement or for the proof of on-going obligations.

4 General

- 4.1 Without prejudice to any other rights or remedies the Parties agree, given the sensitivity of the Confidential Information, damages may not be an adequate remedy for breach (actual or threatened) and the Disclosing Party shall be entitled to seek specific performance and injunctive or other equitable relief.
- 4.2 The Disclosing Party makes no warranty or representation as to the accuracy or completeness of the Confidential Information.
- 4.3 The Receiving party is not granted or assigned (directly or indirectly) any rights in any of the Confidential Information of the Disclosing Party or in any patents, trademarks, copyright or any other intellectual property rights of any kind.



- 4.4 This Agreement is subject to Belgian law, and the parties submit to the exclusive jurisdiction of the Belgian courts.
- 4.5 Each Party shall comply with all applicable laws, rules and regulations in effect, including but not limited to export laws and regulations, and each Party shall obtain all necessary export licenses in connection with any subsequent export, re-export, transfer or use of all Confidential Information disclosed under this Agreement.
- 4.6 In the case of disputes, the Parties shall endeavour to settle their disputes amicably.
- Any dispute, controversy or claim arising under, out of or relating to this Consortium Agreement and any subsequent amendments of this Consortium Agreement, including, without limitation, its formation, validity, binding effect, interpretation, performance, breach or termination, as well as non-contractual claims, may by the Parties who have the dispute be submitted to arbitration in accordance with the WIPO Expedited Arbitration Rules. The place of arbitration shall be Brussels unless otherwise agreed upon. The language to be used in the arbitral proceedings shall be English unless otherwise agreed upon.
- 4.7 For the purpose of this Section, capitalised terms not defined in this Mutual Confidentiality Agreement shall have the meaning ascribed to them in Regulation (EU) 2016/679 (hereafter, the General Data Protection Regulation “GDPR”). In the event personal data are processed in the framework of this Mutual Confidentiality Agreement (hereinafter referred to as “Processing”), each of the Parties to this Mutual Confidentiality Agreement declares that each of them complies with the privacy legislation in force, especially the terms of Regulation (EU) 2016/679 of 27 April 2016 on the protection of natural persons with regard to the processing of personal data and on the free movement of such data, other applicable regulations (hereinafter referred to as “GDPR”).

IN WITNESS WHEREOF, the Parties hereto have caused this Agreement to be executed as of the date of the last signature set out below.

FOR [LEGAL NAME OF PARTY]

[insert name of representative]

[insert title]

Done at [place] on [date]

FOR [LEGAL NAME OF PARTY]

[insert name of representative]

[insert title]

Done at [place] on [date]