

# Case studies and use cases as means of effectively demonstrating value and engaging stakeholders

*Presentation with speaker notes for EOSC Symposium 2022*

## Document details

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Presentation slides <https://doi.org/10.17044/scilifelab.21542313>

## Background

This talk was presented during the *Engagement of research communities and service providers in EOSC* session at the EOSC Symposium in Prague, Czech Republic on 15 November 2022. It was presented by Peter Maccallum (ELIXIR) on behalf of Wolmar Nyberg Åkerström (ELIXIR Sweden) and the EOSC Semantic Interoperability Task Force.

## Description of the talk

The premise of this talk is that case studies and use cases can be used to effectively demonstrate value and engage stakeholders in requirements gathering for developing services. The EOSC Association's Task Force on Semantic Interoperability has drafted a procedure to capture and explore inspiring and representative case studies in order to provide input to the initiatives that are shaping EOSC and to provide examples and lessons learned to stakeholders across Europe. The talk will argue for building a competence network and a curated collection of resources that can be used across EOSC members, projects and task forces with examples from efforts in research infrastructures, special interest groups, EU projects and universities.

## Relevance to EOSC

Encouraging collaboration across EOSC initiatives on collecting case studies and use cases to demonstrate value and engage stakeholders. Addressing the needs for aligning the work of the EOSC implementation projects with EOSC Association's Task Forces.

## Presentation slides with speaker notes

1. About the presentation and the speaker
2. A perspective on what works well
3. ELIXIR Communities example
4. A shared vision of the journey
5. EOSC Portal Use cases example
6. Capturing journeys at different levels
7. Semantic interoperability journeys
8. Task Force charter & documents
9. Shared practices for EOSC Association
10. Contacts

## About the presentation and the speaker



The slide has a teal background. In the top left, the 'eosc' logo is followed by the text 'Semantic Interoperability Task Force'. In the top right is the 'elixir' logo. The main title 'Case studies and use cases' is in large white font. Below it is the subtitle 'User journeys as means of effectively demonstrating value and engaging stakeholders'. Further down, in smaller white text, is 'Engagement of research communities and service providers in EOSC', 'EOSC Symposium, Prague, Czech Republic', and '15 November 2022'. At the bottom left, it says 'Presented by Peter Maccallum (ELIXIR) on behalf of Wolmar Nyberg Åkerström (ELIXIR Sweden) and the EOSC Semantic Interoperability TF'. At the bottom right, there are Creative Commons icons (CC, BY, ND) and the text 'This work is licensed under a Creative Commons Attribution-NoDerivatives 4.0 International License.' followed by the DOI link 'https://doi.org/10.17044/scilifelab.21542313'. A faint graphic of overlapping circles is in the bottom right corner.

**eosc** | Semantic Interoperability Task Force

**elixir**

# Case studies and use cases

## User journeys as means of effectively demonstrating value and engaging stakeholders

Engagement of research communities and service providers in EOSC  
EOSC Symposium, Prague, Czech Republic  
15 November 2022


Presented by Peter Maccallum (ELIXIR)  
on behalf of Wolmar Nyberg Åkerström (ELIXIR Sweden)  
and the EOSC Semantic Interoperability TF

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## Speaker notes

- Peter Maccallum at ELIXIR acted as delegate presenting the topic and slides in place of Wolmar from the EOSC Semantic Interoperability TF. Peter and Wolmar are collaborators in the life science infrastructure network ELIXIR, where they discuss EOSC related activities.
- This talk is a pitch for collaborating on mapping user journeys across task forces and projects. And it's a topic that is also relevant to stakeholder communities that participate in EOSC initiatives—where ELIXIR is one example.
- The presentation is available at the DOI listed on the slides.

# A perspective on what works well

 Semantic Interoperability Task Force

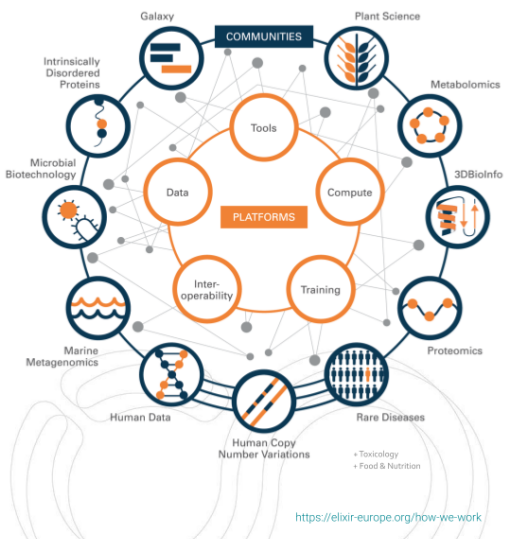
## A perspective on what works well



**Journeys come in many shapes**  
Use cases and case studies can demonstrate value and engage stakeholders in requirements gathering

**Use cases and communities**  
ELIXIR draws on communities to share success stories and define use cases for its services

**Semantic interoperability use cases**  
Provide 1) input to the initiatives that are shaping EOSC and 2) examples and lessons learned to stakeholders



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<https://elixir-europe.org/how-we-work> 2

## Speaker notes

### Key message

Introduction to why topic is related to “stakeholder journeys” & “engagement or onboarding channels” and why we are talking about this in ELIXIR’s and in EOSC TF Semantic Interoperability

### Journeys come in many shapes

- There are plenty of initiatives that list use cases that they implement or case studies on how their services have been adopted.
- Both use cases and case studies describe scenarios where stakeholders interact with services—and thus tells the story of a stakeholder’s journey.
- A compelling story will include a description of the context, the motivations of the actors, and the surrounding environment.
- Telling the story can demonstrate where and how a service provides value or engage stakeholders in describing what they need.

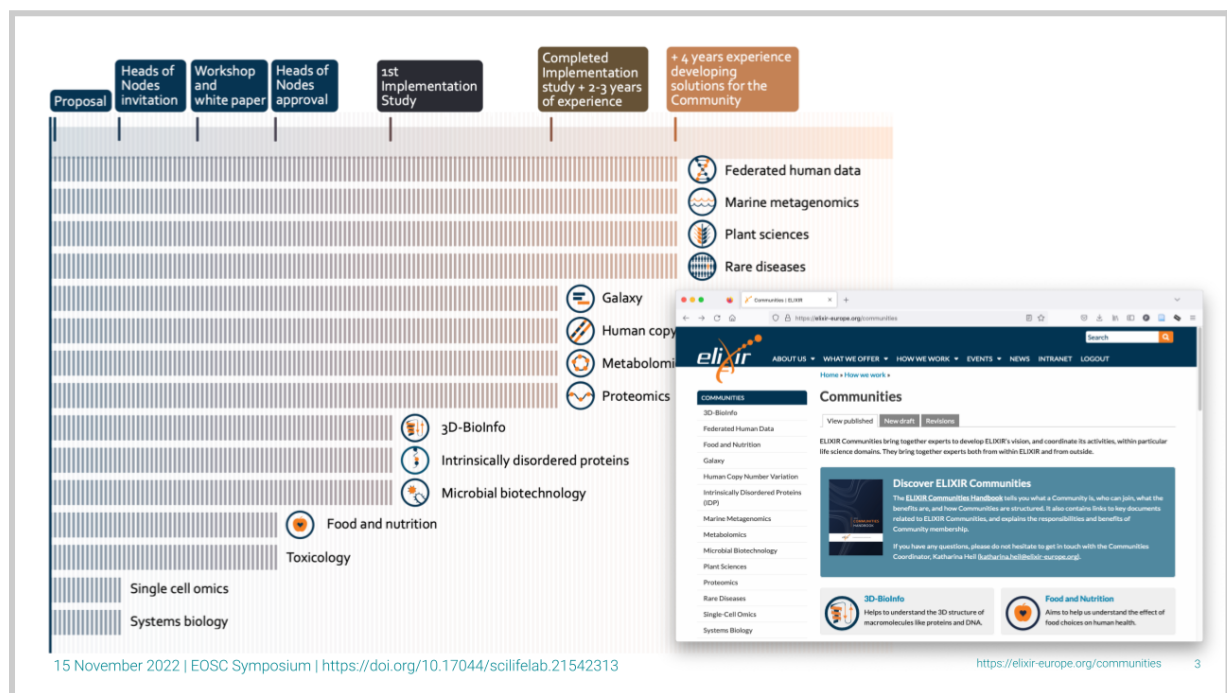
### Use cases and communities

- ELIXIR is a European-wide federated infrastructure for life science data and represents a diverse set of stakeholder communities.
- Services are organised into platforms and the communities share success stories and describe scenarios that should be supported
- Projects coordinated by ELIXIR also rely on case studies and use cases
- The first communities were formed based on use cases initially defined for ELIXIR as a whole

## Semantic interoperability use cases

- The EOSC Semantic Interoperability Task Force works towards realising EOSC's web of FAIR data and services by addressing challenges to semantic interoperability and promoting good practices for encoding research information as data and metadata.
- Addressing semantic interoperability is to ensure that the precise meaning of the information is preserved and can be understood across the tools, workflows and data infrastructures that operate across the wider EOSC.
- Exploring and showcasing case studies and use cases is a way 1) input to the initiatives that are shaping EOSC and 2) examples and lessons learned to stakeholder

## ELIXIR Communities example



## Speaker notes

### Key message



Forming the ELIXIR communities is an example of something that has worked well for ELIXIR. There is a white paper explaining how they are created and how they operate on the ELIXIR website,

<https://elixir-europe.org/communities>

### ELIXIR Communities example

- The transition from use cases to communities have proved to work well for ELIXIR
- They are currently at different stages of maturity and you can learn more about them at the ELIXIR website

## A shared vision of the journey




### A shared vision of the journey

**Use cases demonstrate value**  
Prevalent in contexts ranging from product sales, to EOSC projects, and healthcare governance

**Adopters recognise themselves**  
Used in requirements gathering and communication

**Builders can see the full picture**  
Used in development and validation of services

**Policy can ensure representation**  
Mapping the landscape of stakeholders and how they are served by different use cases



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## Speaker notes

### Key message

“Case studies” and “use cases” can be used to effectively demonstrate value and engage stakeholders in requirements gathering for developing services

### Use cases demonstrate value

- Since use cases can tell a compelling story about what value a service provides, they are used everywhere from commercial sales, EU projects, healthcare, ...
- They can be created to support ideation and development of new services
- Or in evaluation and onboarding for existing services
- There is a session on Use cases demonstrating the added value of EOSC here at the Symposium (17th at 9–10:30 CET)

### Adopters recognise themselves

- External stakeholders who can identify with a use case will be in a good position to see how a service would be useful and how to approach adopting it
- Users are engaged in creating them to make sure that there is enough detail to show that a proposed scenario is realistic, relatable and corresponds to a desirable situation
- Can be used as examples and lessons learned on how to implement practices that, for example, address semantic interoperability in different contexts

### Builders can see the full picture

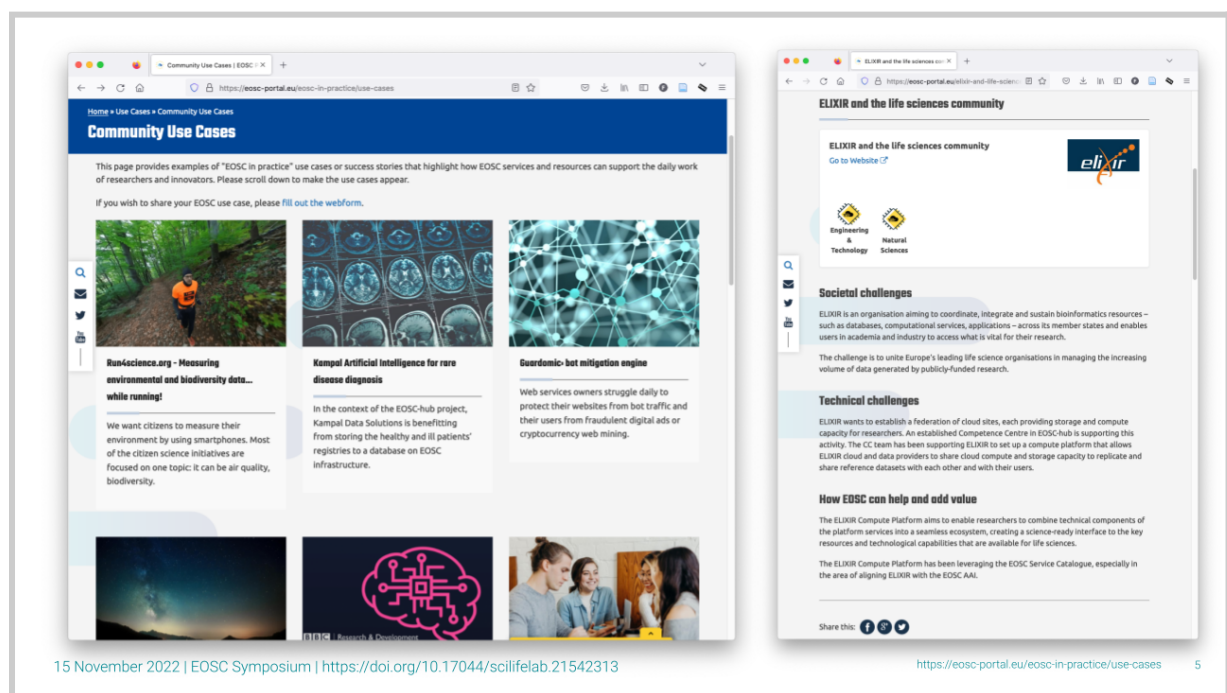
- Internal stakeholders and implementers can develop a shared understanding of the problems and how a proposed solution should be used and the scenarios could be used when testing or validating a service
- Use cases can be developed with enough detail to show how users will interact with the service, putting functional requirements and user stories in context

- One of the desired outcomes is to be able to provide useful input to the projects that are shaping EOSC by illustrating different roles of semantic artefacts (metadata schemas, standards, catalogues and crosswalks etc.) in practical applications.
- EOSC projects,

### Policy can ensure representation

- Ensure that stakeholders are represented and that the "important" use cases are addressed
- Users and service providers across domains and regions
- EOSC Association, SRIA, Tripartite

## EOSC Portal Use cases example



## Speaker notes


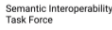

### Key message

Many EOSC initiatives collect use cases, some are less detailed and may be aimed more towards policymakers than builders or adopters,  
<https://eosc-portal.eu/eosc-in-practice/use-cases>

### EOSC Portal Use cases example

- The community use cases presented on the EOSC portal website indicate which stakeholder communities are represented but may not be directly useful for adopters or implementers

# Capturing journeys at different levels




## Capturing journeys at different levels

**Case studies are real-world scenarios**  
Actual people and organisations adopting a solution in a specific context and outcomes of their efforts

**Use cases can be business focused**  
How a stakeholder group can approach adopting a solution to achieve broader goals and outcomes

**Use cases can be task focused**  
How a user interacts with different services and resources to complete a task

**Conceptual models tie them together**  
Actors, components and resources involved and how they relate to more general categories



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## Speaker notes

### Key message

Can talk about “stakeholder journeys” at different levels of detail and each has its purpose. The terms may have different meanings in other contexts but for this presentation “case studies” are examples of real-world scenarios and “use cases” of more general scenarios that can apply across stakeholder groups etc.

### Case studies are real-world scenarios

- The terms used here do not have universally accepted definitions but for this presentation we will use “case studies” to represent real-world scenarios
- An actual organisation and people adopting a solution in a specific context
- And what outcomes they got / expect from their efforts

### Use cases can be business focused

- “Use cases” are more general scenarios that can apply across stakeholder groups
- They can be focused on the process leading to some tangible benefit to a stakeholder community

### Use cases can be task focused



- Or they can be focused on the steps and interactions involved in completing a specific task

### Conceptual models tie them together

- Some patterns in real word case studies can be mapped or generalised to use cases
- Modelling the interactions with the specific services and resources can contribute to identifying broader concepts, such as a category of services or resources
- Using the broader concepts can make use case applicable across stakeholder groups
- Keeping a link between case study, use cases and concepts



# Semantic interoperability journeys




**Semantic interoperability journeys**

**Capturing case studies and use cases**  
Encourage the wider EOSC stakeholder community to contribute interesting and representative examples

**Indexing for adopters and builders**  
Compare and consolidate across stakeholders, tasks, goals and component of the EOSC IF

**Representing the EOSC community**  
Identify and fill gaps in the types of organisations, domains and goals captured by the task force



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## Speaker notes

### Key message

EOSC Association's Task Force on Semantic Interoperability has drafted a procedure for capturing and exploring inspiring and representative case studies in order to provide input to the initiatives that are shaping EOSC and to provide examples and lessons learned to stakeholders across Europe

### Capturing case studies and use cases

- EOSC Task Force on Semantic Interoperability has drafted a procedure to engage the wider EOSC stakeholder community to contribute interesting and representative examples on semantic interoperability
- They would provide input to the task force's activities and to the initiatives that are shaping EOSC
- And they could also service the basis for examples and lessons learned to stakeholders across Europe

### Indexing for adopters and builders

- The task force aims to compare and consolidate across stakeholders, tasks, goals and component of the EOSC IF
- Creating a well organised collection of case studies and use cases

### Representing the EOSC community

- The task force also plans to identify and fill gaps in the types of organisations, domains and goals that are represented in collection



# Task Force charter & documents

## Task Force Charter Semantic Interoperability

**Introduction**  
EOSC and semantic interoperability  
Challenges to semantic interoperability

**Main aims**  
**Objectives**  
O1: Explorations into Semantic Interoperability  
O2: Knowledge exchange around Semantic Interoperability  
O3: Recommendations

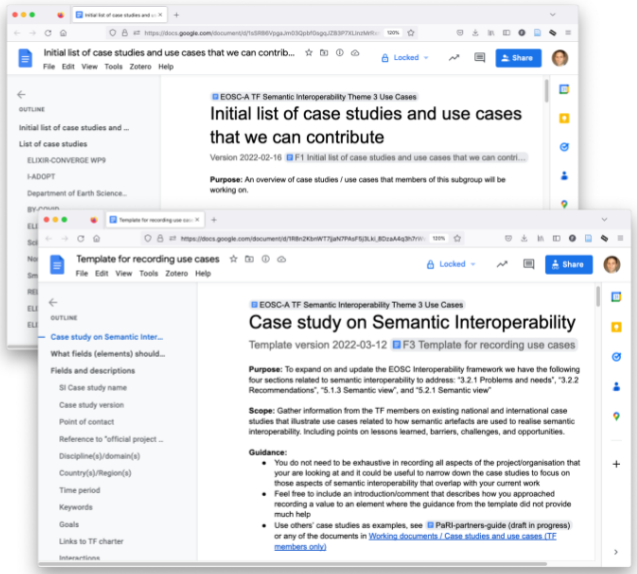
**Core activities of the Task Force**  
**Planned duration of the Task Force**

**Working methodology**  
**Explorations/Case Studies**  
Methods  
Output

**Dependencies**

**Membership**

**References**  
**APPENDIX**  
**Case studies (examples)**



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## Speaker notes

### Key message

The EOSC Semantic Interoperability Task Force Charter lists several stakeholder communities that should be consulted for soliciting use cases, there is an internal initial list of use cases that Task Force members have planned to work on and there is a draft template that will be used and improved as the work progresses.

Contact: [wolmar.n.akerstrom@uu.se](mailto:wolmar.n.akerstrom@uu.se)


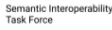

Task Force charter and members:

<https://www.eosc.eu/advisory-groups/semantic-interoperability>


### Task Force charter & documents

- The task force charter lists a wide range of organisations and initiatives that the task force will approach and engage with
- A subgroup has started with an initial list of case studies that the task force members themselves could contribute
- And so far they have converged on a draft list of fields/elements to include in a template
- Before reaching out more broadly the TF will be looking for input on how to improve the template and how to best coordinate with other TF:s / initiatives

# Shared practices for EOSC Association



## Shared practices for EOSC Association



- Guide initiatives through journeys**  
Coordination and steering through the TFs could be better with a shared vision and comprehensive picture
- Host a shared task force catalogue**  
Keeping accumulated case studies in one place could increase their visibility and avoid redundant efforts
- Promote best practices and resources**  
Pooling experiences, procedures and skills will help TF members focus on content over process
- Liaise between EOSC projects and TFs**  
Creating opportunities to communicate can foster further collaboration and synergies

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## Speaker notes

### Key message

Building a competence network and a curated collection of resources that can be used across EOSC members, projects and task forces with examples from efforts in research infrastructures, special interest groups, EU projects and universities.

### Guide initiatives through journeys

- This talk has argued for using case studies and use cases to demonstrate value and to engage stakeholders
- The Semantic Interoperability Task Force is working under this premise
- And it could be argued that EOSC Associations coordination and steering towards the Minimum Viable EOSC could benefit from a similar approach

### Host a shared task force catalogue

- Or at least, to the extent that Task Forces and EOSC Initiatives are already adopting case studies and use cases to support their work,
- Keep them organised/indexed in one place to increase their visibility and avoid redundant efforts


### Promote best practices and resources


- Additionally, pooling experiences, procedures and skills would help task forces members focus on content over process
- A competence network with a collection of useful resources could be used across EOSC members, projects and task forces

## Liaise between EOSC projects and TFs

- Finally, to help build closer collaboration and synergies between EOSC projects, members and the task forces, it would be useful to create opportunities to communicate specifically around proposed and implemented stakeholder journeys
- Reach out to EOSC Semantic Interoperability TF to work on use cases or shared practices through Wolmar. Collaborations with ELIXIR or questions about ELIXIR's communities can be addressed to both Wolmar and Peter.


## Contact

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15 November 2022 | EOSC Symposium, Prague, Czech Republic



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## Speaker notes

### Key message

Reach out to EOSC Semantic Interoperability TF to work on use cases or shared practices through Wolmar. Collaborations with ELIXIR or questions about ELIXIR's communities can be addressed to both Wolmar and Peter.