

## D1.3 Needs Gathering & Policy Mapping Template

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Every effort has been made to ensure that all statements and information contained herein are accurate, however the PoliRural Project Partners accept no liability for any error or omission.

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## 1 Introduction

This deliverable prepares PoliRural partners for pilots, especially laying the groundwork for two forthcoming tasks - *T4.3 Regional Needs Gathering & Analysis* and *T4.4 Needs-Policy Mapping*. **The deliverable introduces key concepts, practical guides and templates for partners in participating regions prior to the start of pilot phase.**

These guidelines allow the information to be collected in a structured manner to facilitate further analysis and evaluation. This deliverable provides guidelines for two purposes in pilots. Firstly, it provides **preliminary guidelines for gathering needs** (task 4.3), which make rural professions and areas attractive or unattractive for established populations and recent or potential newcomers. Secondly, it provides **templates and guidelines** to support policy mapping (task 4.4.), to evaluate policies against needs of rural areas.

The guidelines are based on the PoliRural framework<sup>1</sup> and in addition of the findings of literature study (D1.1 Envisioning More Attractive Rural Places & Professions) and outcomes of PoliRural partner's survey and workshops (June 20 and 21, 2019, Prague).

The content of each pilot is determined locally based on interactions with local stakeholders and taking into account past policy initiatives. The overall approach is intended to achieve strong buy-in from local stake-holders, as well as ownership of the results, which in each case is a package consisting of a vision, action plan and roadmap.

The work of policy mapping and needs gathering tends to focus on the current situation or the recent past. It is one of several inputs to the Foresight process.

Other inputs are provided based on a future oriented process of reflection consisting of specific steps starting with a "drivers analysis" to understand how the future of the region is being shaped or driven, by forces which act over different tile-scales and at different rates and over each region has varying degrees of control.

Subsequent steps include a series of "deep dives." These localize macro-economic trends allowing them to be understood based on the unfolding of local phenomena, which enables local stakeholders to identify the region-specific nature of the challenges these present. Climate change is a well-established major trend, which is driving change in every region of the world. Nevertheless, how it is manifest is different in each region, as are the associated policy challenges as well as the available options for addressing those challenges.

The regional Foresight teams have been provided with materials to support the drivers' analysis task, as well as materials to support the implementation of a series of deep-dives, with a focus on issues that are likely to affect all regions, though to different degrees and in different ways. These issues are

- The impact of and response to the COVID pandemic
- The transition to net-zero and the Green Deal
- The new bio-diversity strategy

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<sup>1</sup> PoliRural Grant Agreement, annex1 DoA.

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- The recent Cap reform

It is not the aim of this document to exhaustively describe the Foresight methodology, which is in any linked to the development of the TM and SDM tools, as well as to the co-production of resources for use in the Foresight initiatives such as

- Various online training events
- The “summits” where the pilot teams talk about progress with Foresight implementation
- The STEEPV inventory of drivers
- The compendium of regional Foresight pilots
- The guides to deep-dives
- The inventory of policy options

All of this work provides for the identification of another set of needs, which is different from but complementary to, those identified by the work of D1.3. This work is ongoing and is reported on in detail elsewhere.

It is impossible to anticipate the full range of issues that may be of relevant to each region and provide for them in a deliverable such as D1.3. Doing so would in any case infantilize the local teams and their stakeholders and deprive them of agency in defining and solving their own problems and ownership of the solutions they define based on a participative policy process conducted at regional level.

This deliverable is structured as follows: Chapter 2 introduces briefly needs gathering and policy mapping tasks. Chapter 3 summarizes the results of needs gathering literature and PoliRural partner survey and workshop study and introduces the needs gathering pillars for survey. Chapter 4 presents general methods for needs gathering and introduces the survey questionnaire battery. Chapter 5 introduces the policy mapping methodology and template.

## 2 Needs gathering and policy mapping tasks in PoliRural pilots

At the first phase, PoliRural pilots will focus on two following major tasks: needs gathering and policy mapping.

### 2.1 Needs gathering

Needs gathering is the first part of the larger needs assessment process. Many different kinds of methods can be used for needs assessments. For instance, needs assessment can be an interview study, a focus group study, a survey or existing data collection or a combination of these. In any context, an important decision is how much effort can be put in such work and what is the best way of using available time and resources to meet the demands. However, it should be noted that needs gathering is just a beginning of the larger assessment process. It can show priorities of needs and priorities of needed actions. It aims to identify gaps in current rural conditions and the desired condition emphasizing the needs of particular segments. The purpose is to improve performance, address deficiency and plan improvements. At the end, the proper involvement of stakeholders ensures that information has a broad base of many perspectives and finally it will increase the possibility that needs gathering will be used to guide actions and programs<sup>2</sup>.

An important starting point could be to define what a need is in the research question. In general, the concept of need is referring to the conditions of rural development, to people's experience with "what should be" vs. "what is". More precisely, we need to define, is the object of the study, for instance, perceived needs, expressed needs, or relative needs. In general, there are certain "basic needs," which are often interpreted as physiological minimal for human survival such as nutritional requirements for good health. There are also relative needs, depending on circumstances. For instance, people coming from different social and economic backgrounds and living conditions may have different expectations for the level of services.<sup>3</sup> Moreover, expressed needs can be defined in terms of what services people use. It is based on what can be concluded about a person or a community through observing their use of services<sup>4</sup>. Perceived or felt need is subjective, it is defined by what people think or feel about their needs. In PoliRural's needs gathering, we are focusing on the factors that would make one want to stay, leave or migrate to a rural area. In this case, we are gathering perceived needs; asking the target group directly and getting feedback on experience from people who can articulate their felt needs.

Understanding the needs of citizens and participation of stakeholders is important to rural development. It is expected to lead to public support for decisions and as a result, to effective and efficient implementation of plans aimed at improving the living environment.<sup>5</sup>

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<sup>2</sup> Witkin, B. R. & Altschuld, J (1995) Planning and Conducting Needs Assessments: A Practical Guide 1st Edition. Thousand Oaks.

<sup>3</sup> Ravallion & Bidani (1994) How Robust Is a Poverty Profile? World Bank Economic Review, 1994, vol. 8, issue 1, 75-102

<sup>4</sup> Marosszeky, N. et al. (2006) Knowing what you need to know about needs assessment. Owen University of Wollongong. Research Online Sydney Business School - Papers Faculty of Business and Law 1-1-2006.

<sup>5</sup> Turnhout E., Van Bommel S., Aarts N. (2010) How Participation Creates Citizens: Participatory Governance as Performative Practice. Ecology & Society, 15(4): 26.

In PoliRural's needs gathering task, pilots seek to understand what makes rural areas and professions attractive or unattractive, for established populations and recent or potential newcomers. Key research questions to be addressed here are what factors would make one want to stay, leave or migrate to a rural area, to take up rural employment, or become an urban farmer in a rural area, for example. To answer them, PoliRural has first reviewed the available literature on rural needs in every participating region (D1.1 Envisioning More Attractive Rural Places & Professions).

In addition, workshops and a survey among PoliRural partners were performed (D1.1 Envisioning More Attractive Rural Places & Professions). As well as updating pilots' knowledge of rural reality, the literature review aims to inform PoliRural's survey design in terms research questions to be explored. The literature review is the first step of needs assessment task and prepares partners to start preparing the survey tools with main analytical concepts and tools. After this, pilots will proceed with an actual investigation by tailoring the survey, workshop and interview tools to for studying their local stakeholders, i.e. members of their regional panels including citizen representatives.

These results will be further used to consulting the big data analysis carried out through text mining.

Needs gathering explicated in this deliverable is part of larger needs assessment process.

Phases of the needs assessment task can be summarized as following:

- Literature study of rural attractiveness
- Questionnaires to stakeholder group
- Results from text mining
- Findings of these summarised to SWOT analyses
- SWOT results discussed with regional panels (workshops, interviews)
- Clustering of pilot regions based on common needs rather than geography

## 2.2 Policy mapping

Given that policy mapping is likely to yield a large number of measures (public and private, regional and local, national and EU-funded), a list will be created from which the most relevant ones will be selected. The chosen measures will be evaluated against a set of criteria that define policy effectiveness, with main efforts focusing on the extent to which specific objectives have been achieved (e.g. improved access to land) as well as more qualitative aspects of a given intervention (e.g. inclusiveness, efficiency, coherence).

Policy evaluation data will be collected in two ways: by (1) surveying panel members and conducting follow-up interviews with interested participants and (2) carrying out extensive desk research assisted by text mining.

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## 3 Needs gathering framework

### 3.1 Findings of the literature review

The literature review conducted in *D1.1 Envisioning More Attractive Rural Places & Professions* provides an overview of the needs gathering framework. The review focuses on the following tasks: (1) attractiveness, particularly rural, as well as related factors (e.g. quality of life) and resources (e.g. rural capital, rural assets); (2) activities and opportunities to increase the rural attractiveness.

The literature review presents several key concepts for rural attractiveness and concludes that progress in sustainable rural development requires using the complete environmental, economic, social and human as well as cultural potential.

To summarize, according to the literature review, the following key words, concepts, demographic groups and topics were identified as central in understanding rural attractiveness and in needs gathering:

- Quality of life
- Territorial capital and rural assets
- Knowledge and innovations
- Ecosystem services
- Multifunctionality of agriculture and farm diversification
- Tourism
- Local food systems and short food chains
- Social aspects of rural areas
- Employment and job opportunities
- Newcomers or new entrants
- Women
- Young people
- Social innovations and innovative activities

In order to secure rural development, sustainable economic growth is seen as necessary. Business creation and new sources of funding for the rural municipalities are essential for development. New forms of entrepreneurship in agriculture and multifunctionality are important factors in the attractiveness of rural areas and professions. In addition, the availability of public services and other assets for the rural residents is seen as crucial concepts in rural attractiveness.

### 3.2 Outcomes of Workshops and the Survey

As described in D1.1, PoliRural partners created visions of rural attractiveness in the workshops. After that, partners were asked to prioritize the different visions (there were six in total). The following definition received the most votes:



***“Rural attractiveness is about sustainable rural communities with access to high quality public services, a thriving and diverse local economy where agriculture related activities are complemented by sustainable tourism and other forms of employment in a working (functioning) countryside, and an attractive, ecologically rich and accessible countryside in which the environment and biodiversity are conserved and enhanced.”***

The following definition was given the second highest priority among PoliRural partners:

***“Rural attractiveness is about a place where everyone wants to live, enjoys high-quality services, proper infrastructure and community spirit, where jobs and living opportunities abound, and where one can find healthy and resilient environment. “***

As it can be concluded from these definitions, the services, job opportunities and community spirit as well as quality of living environment are highlighted in PoliRural rural attractiveness visions. Moreover, certain socio-demographic groups are seen as important for rural development: new entrants, young people (especially well-educated ones), women, creative people etc. Therefore, it is necessary to find out the characteristics of attractiveness for these groups, including the important factors/indicators. These concepts reflect PoliRural partners' insights of rural attractiveness. However, it should be noted that later updates of PoliRural understanding of rural attractiveness (D1.7) recognize also that there is no generic or universal concept of rural attractiveness and in particular, PoliRural wants to emphasize also the region specific concepts, i.e. the concepts that are most suitable for each pilot region, as the most practical solution for the project.

In addition to workshops, a survey among PoliRural partners was conducted. Based on these materials, needs related to the following fourteen main categories were discussed:

1. Public goods
2. Recreation
3. Identity
4. Natural capital
5. Individual well-being
6. Human capital
7. Living conditions
8. Demographic
9. Environment & nature/biodiversity
10. Innovation
11. Economy
12. Housing
13. Service provision
14. Business

In addition, concepts and keywords, which were identified as central in understanding rural attractiveness, were listed by PoliRural partners (see also D1.1 and D1.4). In the survey, partners were asked to tag with “x”, if they agree that these concepts are central for rural attractiveness.

For instance, quality of life, territorial capital and rural assets, sustainable tourism, innovation, employment and job opportunities, promoting the involvement of young people, and women, as well as new entrants and community spirit were seen as important topics with high impact on rural attractiveness.

### 3.3 Needs gathering pillars

Because PoliRural is not focusing only on agricultural or forestry issues, various aspects impacting rural attractiveness were considered. However, the focus is on the aspects that PoliRural pilots and stakeholders see as the most crucial and on the matters, which can in principle be mapped and influenced with political decisions and actions. Less tangible concepts such as *building of social or human capital*<sup>6</sup> can be approached with questions regarding the possibilities for recreation, getting support, trust or appreciation by others in the community. There are also lifestyle related trends in motivations behind peoples moving from urban areas to rural areas. This includes *counter urbanisation* trend discussed in the literature review: a desire for space, quietness, greenery, and safety can motivate people to move to rural areas (see Elshof et al., 2017)<sup>7</sup>. Also a trend known as *Lifestyle migration* is related to better quality of life. It is understood as the mobility of relatively affluent individuals of all ages, moving usually from North to South, either part-time or full-time to places that are meaningful for them, for various quality of life related reasons. This type of migration differs from usual migration pattern which is most often motivated by economic reasons such as seeking better employment (see Eimermann, 2015)<sup>8</sup>.

The themes that were perceived as most important and reflecting the interests of pilots were chosen here so as to form the basis for the needs gathering survey. Although there were many important aspects mentioned in the rural attractiveness literature review, not all aspects can be included in the needs gathering survey as shorter surveys often are likely to have higher response rates<sup>9</sup>.

Combining the findings from survey, the literature study and outcomes from workshops, seven main pillars can be formed for needs gathering:

1. Public goods and services
2. Recreation
3. Living conditions & standard of living
4. Demographics & human capital
5. Business, economy & innovation
6. Social and cultural aspects of rural areas
7. Environment & biodiversity

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<sup>6</sup> Lin et al. (2017) Social capital: Theory and research. Routledge.

<sup>7</sup> Elshof, H., Haartsen, T., van Wissen, L. J., Mulder, C. H. (2017). The influence of village attractiveness on flows of movers in a declining rural region. *Journal of Rural Studies*, 56, 39-52.

<sup>8</sup> Eimermann, M. (2015). Promoting Swedish countryside in the Netherlands: International rural place marketing to attract new residents. *European Urban and Regional Studies*, 22(4), 398-415.

<sup>9</sup> Deutskens, E et al (2004) Response Rate and Response Quality of Internet-Based Surveys: An Experimental Study. *Marketing Letters*, vol 15, pages 21–36.

## 4 Methods for needs gathering

### 4.1 Target groups

The target groups, whose needs pilots aim to research in the needs gathering exercise are *established rural populations and recent or potential newcomers*. To allow multiple views and interpretations, the survey should be targeted to cover as much attitudes of different demographic groups as possible. Especially the opinions and views of young people, women, creative professionals, newcomers and educated people are considered as important in understanding rural attractiveness.

Regional stakeholder panels are created to include representation of all relevant stakeholder groups of each pilot region (policymakers, rural populations, recent or potential entrants to rural areas, experts, innovators). In addition to these main target groups, regional stakeholders and panels can also to define their own, more special segments, such as agricultural academic, community, agro-industry, agri-tech startups, and education bodies.

The methodological approach for the stakeholder mapping and stakeholder involvement for PoliRural is explained in detail in the updated D4.2. Stakeholder Mapping & Regional Panel Setup and Quality & Risk Plan. The basic principle is to involve stakeholders with legal mandate, rural communities, rural newcomers and scientific interest to ensure stakeholder legitimacy, relevance, expertise, influence, and interest to participate in the project activities. In such participatory approaches, stakeholders can explore their interdependencies and use their knowledge and expertise in order to integrate and develop their different perspectives and interests. To ensure high-quality of multi-stakeholder outcomes, it is important to consider stakeholder diversity. This could be done by identifying stakeholders of both genders (female and male), migrants and people from various age groups, including young people and seniors. Another thing to consider is the stakeholder interest in the given issue and the stakeholder influence; whether it is high or low.<sup>10</sup>

### 4.2 Survey

#### 4.2.1 Sample size

The survey can be targeted both to the members of the panel as well as to larger population of the target area.

If targeted to the larger population, the survey size depends on the size of the population or selected segment (for instance newcomers) in the pilot area. However, there should be enough survey responses as well as representation of different demographic segments to allow analysis and evaluation.

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<sup>10</sup> García-Nieto, A.P. et al. (2015) Collaborative mapping of ecosystem services: The role of stakeholders' profiles. *Ecosystem Services* 13: 141–152

Survey sampling is one of the most important aspects of survey design. Ensuring diversity of the sample is a challenge, because reaching some portions of the population and convincing them to participate in the survey could be difficult. But to be truly representative of the population, a sample must be as diverse as the population itself and sensitive to the local differences.

Sampling methods can broadly be classified as probability and non-probability.

Probability samples are selected in such a way as to be representative of the population. They provide the most valid or credible results because they reflect the characteristics of the population from which they are selected.

Probability sampling techniques include random sampling, systematic sampling, and stratified sampling.

- **Random sampling:** The process is done in a single step with each subject selected independently of the other members of the population. In this technique, each member of the population has an equal chance of being selected.
- **Systematic sampling:** Conducted when the population is largely homogenous. Once the sample size has been decided, elements of the population should be arranged in some order and then selected at regular intervals from the list.
- **Stratified sampling:** The approach tries to recreate statistical features of the population on a smaller scale. Before sampling, the population is divided into characteristics of importance for the research — for example, by gender, social class, education level, religion et cetera. Then the population is randomly sampled within each category. For example, if 38% of the population is college-educated, then 38% of the sample is randomly selected from the college-educated subset of the population.

Non-probability sampling techniques include convenience sampling, snowball sampling and quota sampling. In these techniques, the units that make up the sample are collected with no specific probability structure in mind. The selection is not completely randomized, and hence the resultant sample isn't truly representative of the population. For example, in convenience sampling, participants are selected based on availability, reach and/or accessibility; in snowball sampling - based on referrals; and in quota sampling - based on assigned quotas to each subset of the population.

Probability sampling techniques are superior, but they are cost-prohibitive. For the initial stages of a study, non-probability sampling techniques might be sufficient to give a good sense of what the pilots are dealing with. For broader insights, however, it is advisable to move to the more sophisticated techniques.

#### 4.2.2 Survey tools

For the survey, it is recommended to use online tools as it is considered a cost-effective, reliable, effective and fast way of collecting information<sup>11</sup>. There are both commercial and

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<sup>11</sup> Kevin B. Wright (2005) Researching Internet-Based Populations: Advantages and Disadvantages of Online Survey Research, Online Questionnaire Authoring Software Packages, and Web Survey Services. *Journal of Computer-Mediated Communication*, Volume 10, Issue 3, 1 April.

free tools to create online surveys<sup>12</sup>. The EU Survey online tool which is the Commission online tool for survey management is one possible free of charge survey tool.<sup>13</sup> However, when using the on-line survey, there might be a bias a relative lack of representation of smaller groups of those, who do not have access to the Internet. Consequently, paper-based version should be used when it is not possible to reach the target audiences with the online survey.

#### 4.2.3 GDPR/Privacy consent

Considering the research objective of PoliRural, it is necessary to collect some personal and privacy related information from respondents, which may include for instance e-mails, age, gender, and personal opinions. This is why it is important that all the PoliRural surveys will include GDPR/privacy consent. If the survey tools do not allow following PoliRural privacy consent (i.e. for instance if the data is given to third party or deleting the data is not possible in accordance with respondent's request) they should not be used for any kind of pilot purposes. GDPR compliant surveys allow to send the consent before responding to a survey. According to GDPR, in order to collect personal data it has to be ensured that the participant provides the consent to manage his or her personal data. Pilots are responsible to inform the respondents of the reasons why they collect personal data, where they store it, for how long they process it, and in which ways it will be use it in the future. Personal data refers information that makes possible to identify the respondents,<sup>14</sup> such as name, email address, phone number, etc. Measures and procedures for ethics and data protection including consent procedures that all partners need to comply with are described in detail in work package 9 Ethics Requirements, deliverables D9.1 and D9.2.

The stakeholder panel setup is an ongoing process. Pilots are constantly identifying and engaging new members from different geographic places and sectors. Difficulties have been reported, especially as regards communication with people living in small, remote areas. As many inhabitants cannot use the internet, surveys may need to be conducted by other means (e.g. phone), which is time consuming.

#### 4.2.4 Survey scale and needs clustering

It is recommended that each survey uses similar types of scales and levels of measurement so that data analysis and comparison can be done in a structured manner. In other words, real comparison or joint analysis of survey results across all pilots will be only possible if each pilot uses the same set of questions and scales. For the survey responses it is suggested to use Likert scale from 1-5, which measures how the respondents agree or disagree with the following statements regarding rural attractiveness. (1=Strongly disagree, 5=Strongly agree, 0=Doesn't apply). This 5-point Likert scale is recommended to use when researching general public. It is faster to respond than 7-point scale and provides higher degree of measurement precision than 4-point scale. It allows also to select neutral option for those who want to select it. It also provides opportunity to detect changes if the study is repeated.<sup>15</sup>

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<sup>12</sup> <https://www.wordstream.com/blog/ws/2014/11/10/best-online-survey-tools>

<sup>13</sup> <https://ec.europa.eu/eusurvey/home/about>

<sup>14</sup> This issue is dealt with in the internal deliverable on stakeholder engagement methodology prepared by Vidzeme. It is revisited on occasion as the work progresses.

<sup>15</sup> Joshi A et al (2015) Likert Scale: Explored and Explained. British Journal of Applied Science & Technology 7(4): 396-403

When the statement is positive such as “There are good medical services in the area”, the scale should be 1-5. In case of a negative statement, such as “there are not enough recreational activities for young people in the area”, the scale should be inverted to 5-1.

As a result, the use of Likert scale allows evaluating which pillars and questions are at high, low or at medium level. For instance, is the level of public services perceived as good or does the area offer good opportunities for business and innovation.

Use of the Likert scale allows pilots to move towards SWOT –analysis, identifying strengths and weaknesses, by giving insights to which aspects of rural attractiveness need to be improved in the area and which are already on strong level.

By allocating a score to the needs pillars, it is possible to get the score not only for the overall needs category, but also for the alignment (or misalignment) of certain types of needs which may be easily analysed.

*Table 1. Needs scoring*

	Answer score 1 - 2	Answer score 3 – 4	Answer score 4 - 5
Needs pillar	Low	Medium	High

As a result, the use of Likert scale allows evaluation of needs pillars and questions and which ones have a high, medium or low level of satisfaction. The survey is then able to give insights to which aspects of needs should be improved in the pilot area and allows clustering pilots according to needs.

#### 4.2.5 Survey design

Each pilot should conduct a survey that gathers the needs of the above-mentioned target groups in their area. Pilots can tailor their own survey using and modifying the questions most relevant for their area. The survey questionnaire battery (Table 2) offers tools to explore how needs are currently met. The questionnaires should be translated into national languages and then summary report provided for the common use for the project. For preparing the summary report, pilots will need to decide what are the most important, common questions that will be included in all of the pilot surveys and in which format the results are shown and which descriptive statistics will be used. Below is the table 2, which presents a battery of survey question examples.

Table 2. A survey questionnaire battery template

Pillar	Survey question example	Scale 1=Strongly disagree, 5=Strongly agree	0= Doesn't apply
1.Availability of public and other services	This area offers quality commercial services such as restaurants, shops, car maintenance, etc.	1-5	0
	There are good medical services in the area.	1-5	0
	There are good schools (kindergarten and primary) in the area	1-5	0
	There are good daycare facilities in the area.	1-5	0
	There are opportunities for higher or professional education and lifelong learning in the area.	1-5	0
	The connections between rural and urban areas (e.g. airports, train connection) are poor.	5-1	0
	Good public transportation is available in the area.	1-5	0
	There is a good internet/telecom coverage. (4G/5G/fiber)	1-5	0
2. Recreation / social activities	I feel that there are plenty of good and different recreational activities in the area.	1-5	0
	There are not enough recreational activities for young people in the area.	5-1	0
	Extra-curricular activities for children are too expensive in the area.	5-1	0
	Young/elderly people/new comers etc. are offered activities and a space where to meet.	1-5	0
3. Living condition, quality of life and standard of living	Housing prices are reasonable in the area.	1-5	0
	The area offers opportunities for having spacious housing and big yard, making it an attractive place to live.	1-5	0
	The air quality is good.	1-5	0
	The area does not offer quality and comfort housing.	5-1	0
4. Demographic & human capital	There are too few young people in the area.	5-1	0
	There are too few women in the area.	5-1	0
	There are too few babies born in the area.	5-1	0
	There are too few young families in the area.	5-1	0
	The dependency ratio is sound in the area; there are enough working people to support the dependant population (i.e. children, elderly).	1-5	0

	I get social support from my local network	1-5	0
	It is possible to find marriage and dating partners in the area.	1-5	0
	People are sharing their knowledge and there is trust in this community.	1-5	0
	I feel recognized and appreciated by my local community.	1-5	0
5. Business, economy & innovation	The area offers good opportunities for start-ups and creating new businesses.	1-5	0
	There are instruments for financing innovative/new rural activities	1-5	0
	There are possibilities to participate to business ecosystems.	1-5	0
	The area is good for new, innovative companies and creative professionals.	1-5	0
	The area doesn't favour eco-firms and sustainable business.	5-1	0
	There are not enough possibilities for employment.	5-1	0
	The area offers possibilities for sustainable tourism.	1-5	0
6. Social and cultural aspects of rural areas, diversity in decision-making and equal opportunities	Women and men equally participate in decision making and working life.	1-5	0
	Loneliness and isolation affect many people in the area.	5-1	0
	There are good opportunities for young people to participate in decision making.	1-5	0
	In the area exists lively communities and citizen-driven local activities are in the area.	1-5	0
	There are good opportunities for women to participate in various social activities and working life in the area.	1-5	0
7.Environment & biodiversity	The area has wide-open landscapes or other beautiful nature scenery.	1-5	0
	Nature in the area is diverse.	1-5	0
	Cultivation practices in the area are done in environmentally sound way.	1-5	0



### 4.3 Interviews, panels

Interviews, panels and workshops are methods to involve stakeholders in needs assessing and policy mapping processes. This kind of qualitative method is suited especially for policy mapping tasks that have specific questions, a limited time frame, a pre-designed sample and a priori issues<sup>16</sup>.

The stakeholder interviews and panels can take different forms. The interviews can be done with one stakeholder or expert only whilst panels include members from different organizations, backgrounds and expertise. During the COVID 19 pandemic it is strongly recommended that the interviews, workshops and panels are held on-line.

Whatever form the interviews and panels take, individual or group, telephone/Skype interviews or Teams/Zoom meetings, there should be a structured and effective method of asking questions and for gathering information. The questions should be formulated in a manner that the participants are able to respond to them in a constructive and informative way. The aim of the interview should be explained in the beginning.

A structured Interview template is attached in this deliverable (Annex 1). The template allows to ask questions and make summaries of responses to make further analysis possible.

The interviews can start with asking about the context of the stakeholder – how the organization in question is related to rural development. The second set of research questions can focus on discussion on the most crucial factors for rural attractiveness and what kinds of needs should be met considering established rural populations and recent or potential newcomers. The third set of questions can focus on stakeholders' activities and success to increase rural attractiveness. In this part the stakeholders can be asked to rate the impact or success of programmes or activities on rural development. The last part of the interviews/panels could focus on future activities or scenarios needed to gain rural attractiveness. With this template, the interviewer is also able to evaluate quickly, in which research topics the interview was informative, by ticking the option in the table at the end of document.

The qualitative interviews are a form of information gathering that is used to gain stakeholders' insights, but not a mandatory step. The concept of rural attractiveness of PoliRural project will be clarified at start of the interviews and surveys.

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<sup>16</sup> Srivastava, A. & Thomson, S. B. (2009). Framework Analysis: A Qualitative Methodology for Applied Policy Research. *JOAAG*, Vol. 4. No. 2

## 5 Methods for policy mapping

Policy is usually intended as being led by public bodies (i.e European Commission, national Ministries, local authorities etc.). In the context of PoliRural it is however deemed important to include also private initiatives that may have an impact or provide a response to the above identified needs.

In this context, both public and private bodies and organisations are included in the notion of decision makers. Pilots should try to reach out to decision makers at different levels: local, regional, national.

In their mapping exercise, pilots are consequently asked to consider both public and private initiatives, in order to have an exhaustive overview of the situation.

Several methods will be used for policy mapping, including expert panels, interviews and participatory workshops with stakeholders, as well as text mining. The introduction to methods here is an overview of possible approaches rather than a prescribed format of how pilots should carry out their policy mapping activities. All the methods, however, should be compliant with Ethics Requirements described in detail in D9.1 and D9.2.

### 5.1 Policy mapping template and interviews

For the purpose of the policy mapping, partners should start with identifying policy initiatives that are running or have been implemented in their region or that are affecting their region (local, regional, national, EU). To this end, a tool is developed to support them (Excel template that will be provided to partners through in PoliRural's documents and project management system Redmine).

The template will support pilots in their desk research, and in compiling the information gathered from the interviews with policy makers and with the text mining.

For each policy/programme identified, pilots will have to report in the table the following information:

- Needs addressed: as assessed by the survey
- Title of the policy/programme: full name/legal reference
- Policy/programme: this refers to the initiators/owners of the policy/programme
  - Public policy
  - Public programme
  - Private sector measures: what businesses, big and small, are doing to help rural areas, farmers etc.
  - Third sector measures: what charities and NGOs are doing
  - Private and local initiatives: activities implemented by a single person or a group of residents
- Level at which the policy is launched
  - International level
  - EU level
  - National level
  - Regional level

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- Local /grassroot level

- Beneficiaries: farmers, youth, vulnerable groups, citizens...
- Overall aim/Description
- Expected Impact: briefly describe what does the policy /programme aim to achieve
- Specific activities: briefly explain what activities /measures are to be put in place
- Geographical coverage: where does the activity take place
- Duration/Starting date
- Budget: is there any budget made available for implementing activities
- Contact/Website: add links for more information/full text

It is of crucial importance to involve policy makers at an early stage of the project, and for them to be fully involved in the identification of shortcomings and opportunities in policies for rural development. This is why the mapping exercise will be two-fold and combine interviews for policy makers and remote desk research done by the partners. The combination of the two activities will result in the final policy mapping.

The interviews will be carried out with the use of a questionnaire, that was shaped in a similar manner to the ones that will be used for stakeholders. It will help policy makers to reflect on the actual state of rural prosperity, competitiveness, development and finally attractiveness in the participating regions.

To start the mapping, pilots could start by identifying contact points at the Municipality / City Council, and from there, move upwards to the regional and then national level. Once a contact person is identified, pilots shall share with them the survey, asking them to fill it in. The link to the survey will be sent to the stakeholder. The outcome of the survey will help the pilot in filling the template table.

The same process shall happen at the regional and national level.

At the end of this mapping exercise, the template will allow pilots to have an overview of existing policy or programme initiatives implemented at national/regional/local level; they will consequently be able to assess policies/programmes and have a better idea of what measures are put in place in their area/region.

The questionnaire for policy makers was designed based on the one for stakeholder.

## 5.2 Workshops

Once the mapping exercise is completed, pilots will organise workshops so as to 1) present the outcomes of the policy mapping, and 2) have a common understanding of the actual needs of the rural areas and develop together solutions for making rural areas more attractive.

### 5.2.1 Policy mapping workshops

The workshops will bring together relevant stakeholders including citizens (gender balance and age balance to be considered), policymakers, and the private sector (e.g. agro industry, NGOs, local association). It will offer some space for a dialogue on needs and expectations to

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make rural areas more attractive and competitive. The overall aim of these workshops is to help policy makers in understanding if and how the actual needs of the local population are met or not with the policies / programmes they are implementing. The workshop will set the frame for developing future alternative policy solutions.

The workshops shall be designed using a participative approach, enabling discussions and solutions to the shortcomings. The workshop can last up to one day (ideally) to allow enough time for presentations, including the mapping of existing policies, and the outcomes of the needs gathering.

The first part of the workshops will be dedicated to providing an overview of the region: the previous mapping exercise will be unveiled, as well as the results of the stakeholders and policy makers interviews. This will set the frame for discussions, and participants will be offered some space for identifying priorities and potential measures to be adopted or proposed by policy makers. The overall aim will be to co-create recommendations to improve the quality of the area.

It is important to make sure that expert knowledge and understanding is available in these meetings. If not, the whole process will be at the mercy of people with little knowledge but lots of good intentions. The participation of these experts is essential for success, and so it is advisable to plan the meetings based on their availability. Other stakeholders who cannot make it to the meeting, can be consulted later. They can be informed of the outcomes and given opportunities to provide feedback later.

The advantage of group work is that it provides a real sense of engagement and ownership on the part of those who take part. It also provides an important opportunity where stakeholders from different backgrounds can contribute with their own unique and timely perspectives. Given the constraints imposed by the pandemic, it may not be possible to have the kind of group-work session that is usually conducted in a typical foresight exercise. Pilots should therefore adapt to the situation and find a good mixture of on-line and off-line meeting formats, that permit the use of plenary and break-out modes of working.

When discussing policy options, it might be useful to start with a preliminary list and then complete based on input from stakeholders. Use the discussion to check that measures are adequately described. It may be necessary to clarify the intervention logic for each measure to better understand which particular needs it covers.

While the event is in progress, make sure there is a balanced discussion going on i.e. everyone gets a chance to speak. Encourage the quieter stakeholders to also express an opinion, and manage those who talk all the time. After the event, provide a transcript of the meeting (with private and confidential information properly redacted), or at least detailed notes for others to comment on. Ask for any additional relevant information that can support the conclusions reached.

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## 6 Conclusion

The deliverable has introduced key concepts, practical guides and templates for partners in participating regions prior to the start of pilot phase. Firstly, it has provided *preliminary guidelines* for gathering needs with survey (task 4.3). Secondly, it has provided *templates and guidelines* to support policy mapping (task 4.4.), to evaluate policies against needs of rural areas.

For needs gathering -exercise the deliverable has made guidelines how to provide GDPR compliant, effective and informative surveys covering the needs of the target groups. Moreover, a questionnaire battery template for survey has been introduced in this deliverable . In addition, the deliverable has provided templates for panels and stakeholder interviews for policy mapping to gain insight from stakeholders. To support policy mapping exercise, this deliverable has come up with a template to gather information about policy programmes for pilots as well as templates for workshops and interviews with policy makers.

Needs gathering and policy mapping are two tasks in a larger needs assessment process. Needs gathering is conducted to improve perception of values and inform policy making for the benefit of specific stakeholder groups e.g. rural newcomers, new entrants to agriculture, existing rural communities. However, it should be noted that needs assessment is not a magic bullet that can bring about desired change overnight - the situations are often ambiguous, complex and may involve political controversies. Engagement of stakeholders is essential for the success for the whole process.

## 7 Annex 1

### 7.1 Interview template stakeholders -Needs gathering

Context
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Summaries on the level of numbered questions. Please sort the content: Do not just write the answers under the questions how they came out in the interview, but organize them under the suitable topic. PoliRural Rural Attractiveness -concept first explained to informant as it defined in the specific pilot area.

1. **Can you summarize for us please, what is the aim of your organization? What is your role in the organization?**
2. **In your words, what is your organization's interest in rural development?**

**Short summary/reflection on the level of heading [here: Context]**

What is the context in a nutshell? Please shortly make the link to relevant research themes. Was there something unusual/surprising? You can compare to similar cases or refer to some literature/comparable cases of relevance.

Rural Needs? [Current situation]
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Summaries on the level of numbered questions. Please sort the content: Do not just write the answers under the questions how they came out in the interview, but organize them under the suitable topic.

3. **In your own words, what are most crucial factors for rural attractiveness in your region? What kinds of needs should be met considering established rural populations and recent or potential newcomers? What factors would make one want to stay, leave or migrate to a rural area, to take up rural employment, or become an urban farmer, for example?**
4. **How do you perceive the following rural needs are met in the rural area in question?**
  - Public goods and services (medical services, schools etc.)
  - Recreation (hobbies, sports etc.)
  - Living conditions & standard of living (housing, air quality etc.)
  - Demographic & human capital (young people, women, elderly etc.)
  - Business, economy & innovation (start-ups, ecosystem firms, sustainable agriculture firms etc.)
  - Social and cultural aspects of rural areas (women, young people, handicapped, community, tradition etc.)
  - Environment & biodiversity (landscapes, environmentally sound cultivation)
5. **Can you think of examples that work well?**
6. **Can you think of examples that have failed?**

**Short summary/reflection on the level of heading**

What is the content in a nutshell. Please shortly make the link to relevant research themes. Was there something unusual/surprising? You can compare to similar cases or refer to some literature/comparable cases of relevance.

Stakeholder's activities and success to increase rural attractiveness

the answers under the questions how they came out in the interview, but organize them under the suitable topic.

1. **Do you directly aim measures/programs/activities at supporting rural attractiveness? If yes, please elaborate. What is the idea behind these?**
2. **Does your organisation have an agenda to support rural attractiveness? If yes, please elaborate. What is the logic behind these?**
3. **If your organisation participates in measures/programs/activities by other organisations that include rural attractiveness, please elaborate.**
4. **How do you rate the impact/success of the measures/programs/activities on rural development, please elaborate. [here: the programs in policy mapping excel]**
5. **How do you rate the impact/success of your measures/programs/activities on rural development, please elaborate. [here the those of the organization]**
6. **In general [apart from your activities] is there anything in the local or national policy context (or economic context) that has influenced development of rural attractiveness?**

**Short summary/reflection on the level of heading**

What is the content in a nutshell. Please shortly make the link to relevant research themes. Was there something unusual/surprising? You can compare to similar cases or refer to some literature/comparable cases of relevance.

Future activities

Summaries on the level of numbered questions. Please sort the content: Do not just write the answers under the questions how they came out in the interview, but organize them under the suitable topic.

7. **If you imagine your region in five or ten years from now, what activities/measures/programmes would you consider useful to support?**
8. **In your view, what would be the role of the European Union to support rural attractiveness?**

**Short summary/reflection on the level of heading**

What is the content in a nutshell. Please shortly make the link to relevant research themes. Was there something unusual/surprising? You can compare to similar cases or refer to some literature/comparable cases of relevance.

Independent research themes/Locally tailored questions

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Summaries on the level of numbered questions. Please sort the content: Do not just write the answers under the questions how they came out in the interview, but organize them under the suitable topic.

**Short summary/reflection on the level of the whole case**

something unusual/surprising? You can compare to similar cases or refer to some literature/comparable cases of relevance.

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Research theme	This interview is particularly relevant for the following research themes (to be ticked by writer of interview summary)
1. Current state of rural needs	<input type="radio"/>
2. Needs of new comers	<input type="radio"/>
3. Needs of established populations	<input type="radio"/>
4. Needs of young people	<input type="radio"/>
5. Needs of women	<input type="radio"/>
6. Public services	<input type="radio"/>
7. Recreation	<input type="radio"/>
8. Standard of living, living conditions	<input type="radio"/>
9. Demographics & human capital	<input type="radio"/>
10. Social and cultural aspects of rural areas	<input type="radio"/>
11. Local business and innovation	<input type="radio"/>
12. Environment and biodiversity as rural attraction	<input type="radio"/>
13. Success of policy programs/measures	<input type="radio"/>

## 8 Annex 2

### 8.1 Interview template policy makers

Context- your organization and your role

Summaries on the level of numbered questions. Please sort the content: Do not just write the answers under the questions how they came out in the interview, but organize them under the suitable topic.

1. **Please summarise, the overall aim of your organisation. At what level does your organization (policy, implementation), and what is your role in your organisation?**
2. **How is your organization involved in rural development?**
3. **How do you make the link with measures/ policies existing at the EU level?**

**Short summary/reflexion on the level of heading [here: Context]**

PoliRural identified a number of rural needs, and identified existing policies.

Rural Needs and policy measures [Current situation]

Summaries on the level of numbered questions. Please sort the content: Do not just write the answers under the questions how they came out in the interview, but organize them under the suitable topic.

4. **Measuring the impact of policies / measures for rural attractiveness:**

**How does the policy you develop impact the following rural needs?**

- Public goods and services (medical services, schools etc. )
- Recreation (hobbies, sports etc.)
- Living conditions & standard of living (housing, air quality etc.)
- Demographic & human capital (young people, women etc.)
- Business, economy & innovation (start-ups, ecosystem firms, sustainable agriculture firms etc. )
- Social aspects of rural areas (women, young people, people with disabilities etc.)
- Environment & biodiversity (landscapes, environmentally sound cultivation)

**Measuring your policy impact: how does your organization measure the impact of its policies?**

- **What policy measures have had a positive impact on the above mentioned needs?**
- **What policies failed in meeting the above mentioned needs?**
- **In case of failure, how were the above mentioned needs addressed by new measures?**

Future activities

Summaries on the level of numbered questions. Please sort the content: Do not just write the answers under the questions how they came out in the interview, but organize them under the suitable topic.

5. What is currently missing in the policy approach? Which policies/measures/programmes would you consider useful to support
6. In your view, what would be the role of the European Union to support rural attractiveness?

Research theme	This interview is particularly relevant for the following research themes (to be ticked by writer of interview summary)
1. Current state of rural needs	<input type="radio"/>
2. Needs of new comers	<input type="radio"/>
3. Needs of established populations	<input type="radio"/>
4. Needs of young people	<input type="radio"/>
5. Needs of women	<input type="radio"/>
6. Public services	<input type="radio"/>
7. Recreation	<input type="radio"/>
8. Standard of living, living conditions	<input type="radio"/>
9. Demographics & human capital	<input type="radio"/>
10. Social aspects of rural areas	<input type="radio"/>
11. Local business and innovation	<input type="radio"/>
12. Environment and biodiversity as rural attraction	<input type="radio"/>
13. Success of policy programs/measures	<input type="radio"/>

## 9 Annex 3 Responses to the monitors' comments

Comment made by the monitors	Explanation
<p>This deliverable is setting up the content for the pilots, creating a framework for policy mapping and needs gathering. This Deliverable is crucial to ensure a solid basis for the work ahead. Overall: well written; clear; based on D1.1. However, a few issues relating with the overarching methodological approach and state of the art of regional development in rural areas require a sharpening.</p> <p>It draws significantly from the literature review which as the comments on that deliverable indicate has shortcomings (it also draws from workshops). Indeed these shortcomings are carried through to the key words that are identified as being central in understanding rural attractiveness on p. 6. It is curious community or social capital is not properly explored. Counterurbanisation and lifestyle migration is discussed in the literature review - it is not mentioned here. Thus it seems to be a rather randomly selected list of words. How are women and young people, for instance, social aspects of rural areas? Equally, the reason for the focus is on the two niches of social farming and SFC in the agricultural field is not properly elaborated. Overall the methodological foundation including a thorough guideline for the science based compilation of needs is not fully clear.</p>	<p>Overall methodological approach for needs gathering survey and policy mapping is elaborated more, with the notion that “The deliverable introduces key concepts, practical guides and templates for partners in participating regions prior to the start of pilot phase”.</p> <p>The earlier version drew significantly from the first literature review (D1.1), which had some shortcoming according to the comments. In revised version of D1.3, the choice of key words and central concepts of rural attractiveness is explored in more detail and the battery of questions is reorganized. (p.13-15)</p> <p>The most important keywords were not randomly selected but reflect the interests of pilots. This is elaborated in more detail in the deliverable. In workshops, surveys and further discussion with pilots and PoliRural partners and stakeholders it turned out that it is expected that certain aspects will be focus on: 1. Availability of public and other services and 5. Business, economy &amp; innovation. These are also aspects that can be measured more concretely and can be influenced/re-steered by political decisions later on, much easier, for instance, than more fuzzy and abstract concepts social capital or community, which, however, were added also in the survey. The focus is hence on the aspects stakeholders see the most crucial, and most importantly that can be, in principle, influenced with political decisions.</p>
<p>The methodological approach for the stakeholder mapping and stakeholder involvement in the pilots is lacking in this report. For example, it is not clear, if the local stakeholder groups consist mainly of local consortium partners or if other organisations and stakeholders have been involved and how they were selected. Do the group represent academic and non-academic expertise? Is the involvement of public and private stakeholders appropriate? The review process showed that gender was not fully balanced in the groups. p. 15 local associations and NGOs are generally not considered the private sector.</p>	<p>The methodological approach for the stakeholder mapping and stakeholder involvement for PoliRural is not meant to be explained in detail in this deliverable but in the updated D4.2. Stakeholder Mapping &amp; Regional Panel Setup and Quality &amp; Risk Plan. However, the basic principles is to involve stakeholders is also added in this deliverable. (p.14)</p>
<p>2 reveals that most PoliRural partners focus on non-ag/forestry issues in rural areas; less expertise in the field of ag-economics and access to land and land use conflicts. This is fine and in-line with the work of the</p>	<p>It will be made more explicit by the study team in the revised version that PoliRural is not focusing only on agricultural/forestry issues. No. 6 statement deleted. Battery of questions reformulated.</p>

<p>sister projects. However, this focus must be made explicit because it will provide guidance to the coordinators of the 12 pilot areas. The battery of questions in table 1, p. 11 has some problematic statements, namely no. 6. Everything needs a proof read. What about health beyond medical services (this is too vague anyway)?</p>	
<p>Qualitative interviews do not normally have an evaluation of how informative the research topic was p.12. In order to get the most from the interview coding usually occurs via transcripts. Further, the way in which the concept of attractiveness is dealt with is problematic - it needs to be clarified at the start of the interview.</p> <p>The policy mapping has the potential to become a very large task indeed...the information and guidance provided is not convincing in terms of guiding partners. Is it really possible to map absolutely all policies that impact on a rural area – economic development, health, housing, regional planning, rural development, agriculture, etc? It is not fully clear which concept PoliRural chooses to cover the legal framework and its role for the rural area (e.g. nature conservation legislation, land heritage laws, land use related legislation with land title registration, taxation).</p> <p>Section 4.4 provides a relatively quick intro to the foresight scenario workshops, which will require more thorough theoretical foundation and practical guideline prior to implementation in WP4. How are citizens and experts to be identified? A needs assessment and the organisation of scenario workshops in one year without cooperation with the stakeholder groups in the past sounds very challenging. The plan shown in Table 3 looks very challenging to be realised during the Corona period.</p>	<p>Here, the qualitative interviews also are a form of information gathering that is used to gain stakeholders insights, but not a mandatory step. The concept of rural attractiveness of PoliRural project, as it defined in the specific pilot area will be clarified at start of the interviews and it was added in the Annex Interview questions template.</p> <p>It is not the intention of the policy mapping to map all the policies that have an impact on the rural areas and be all-embrative. Furthermore, it is not in the assignment of this deliverable to choose the concept of the legal framework for PoliRural but to introduce the practical templates and possible concepts to map the policies that have an impact and are in the interest of specific the pilot area.</p> <p>This section from earlier version (with some guidelines for preliminary foresight workshops) is removed for clarity as it was only optional step in needs gathering.</p> <p>The recommendations to organize interviews, panels and workshops online during covid-19 (p.19) is added as well as general recommendations for citizen and stakeholder engagement.</p>
<p>Overall, the set-up of the local stakeholder groups and the methodological foundation of the work with the pilots regarding needs assessment require a thorough scientifically-based review. This work cannot be</p>	<p>The set-up for local stakeholder groups has been updated in the revised version of D4.2. Stakeholder Mapping &amp; Regional Panel Setup. This revised</p>

<p>delivered by the monitors as part of the first interim review. However, this review is strongly recommended in order to ensure a solid basis for all further work, including the clustering of the pilots</p>	<p>version of D1.3. provides improved methodological foundation for pilots to work with needs gathering including the basic principles of clustering pilots (p.16). However, this deliverable is not meant to be a scientific state-of-the-art, but a practical guide for pilots to conduct their needs gathering and policy mapping exercise parts at the first phase of the larger needs assessment process. Thus it “introduces key concepts, practical guides and templates for partners in participating regions prior to the start of pilot phase”.</p>
<p>Overall, it seems like a great job, clear and conversational. The part that I think is less clear is point 4.2.1, the sample size. This part indeed is more of a guide for pilots, but at the same time, I consider it less thorough than necessary. Something is said in the previous paragraph. Perhaps, specifying in 4.2.1 those who would have been involved in the questionnaires, it is further clarification.</p>	