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The Floor to the Experts

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Executive summary

This deliverable reports the activities carried out during the Proof of Concept phase of the project *"The Floor to the Experts"*, developed by the research team composed of **G. Barone (University of Bologna), F. Giovanardi (Prometeia), F. Maggio (University of Bologna), V. Rattini (University of Bologna), and S. Tomasini (Prometeia)**, in collaboration with Exprivia for the technological implementation.

The initiative is designed to collect and disseminate structured expert opinions on economic issues of public relevance in Italy. The objective of the project is to develop a recurring survey addressed to a selected pool of economists, whose aggregated responses will be made publicly accessible through a digital platform.

The Proof of Concept phase focused on validating the methodological, organizational, and technological foundations required for the implementation of the initiative. Activities included the development of a governance framework, the definition of a taxonomy of economic topics, the construction of an expert pool, and the design of a standardized survey architecture.

Particular attention was devoted to ensuring GDPR compliance through the implementation of consent procedures, privacy-by-design principles, and strict separation between individual responses and publicly disseminated aggregated results. The technological infrastructure was tested in collaboration with Exprivia using the AMELIA platform, with multiple iterations aimed at ensuring usability, stability, and scalability.

The outcomes of this phase demonstrate the operational feasibility of the project and establish the conditions necessary for the transition to full deployment of recurring survey waves.

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1.1 Project Objective

"The Floor to the Experts" is an initiative aimed at collecting and disseminating expert opinions on current economic issues of public relevance in Italy through a recurring and structured survey framework. Surveys are sent to a selected pool of economists working in academia, institutions, and private organizations, with the goal of informing the policy debate by producing accessible and evidence-based insights for citizens, journalists, and policymakers.

The Proof of Concept phase focused on developing and validating the methodological, technological, and governance architecture necessary to operationalize the survey platform. In particular, the research team worked on defining a scalable system capable of:

- selecting relevant economic topics with high media resonance on a regular frequency;
- organizing and maintaining a structured pool of expert respondents;
- ensuring full compliance with privacy and data-protection regulations;
- designing a survey interface compatible with a fast and recurring data-collection process;
- preparing the integration with the AMELIA digital platform for data collection and results dissemination.

The Proof of Concept therefore represents the foundational stage required to test the practical feasibility, of the project before full operational deployment.

1.2 Design and Governance

During this phase, the research team established the overall scientific and operational governance of the initiative. The main objective was to define a transparent framework capable of ensuring methodological consistency across survey waves while maintaining flexibility in topic selection.

Key governance components developed during the Proof of Concept include:

- the definition of a scientific oversight structure responsible for topic validation and survey coherence;
- internal procedures for question formulation and revision;
- alignment between scientific objectives and technological implementation;
- the establishment of recurring workflows linking topic selection, survey deployment, and result publication.

The governance framework ensures that the survey remains scientifically grounded while being responsive to an ever-changing public debate. This structure also allows the project to maintain

continuity across waves, as surveys are expected to be conducted approximately every three weeks, with a short response time and a limited number of questions per wave.

1.3 Topic Definition and Tagging System

An important component of the Proof of Concept phase was the development of a semi-technical taxonomy for economic topics, designed to ensure methodological consistency across survey waves and to facilitate the alignment between policy debates and expert opinions.

As a first step, the research team conducted a **retrospective analysis covering approximately two years of potential survey topics**, systematically reviewing economic issues discussed in public debate and media coverage. This exercise involved the examination of previously drafted survey proposals, including structured questions, thematic areas, and associated policy dimensions. The retrospective dataset allowed the team to test the robustness of a tagging framework grounded in real-world policy discussions rather than abstract classifications.

Based on this analysis, a tagging system was developed to classify each survey wave according to macro-areas reflecting key dimensions of economic policy and public debate. The taxonomy includes domains such as:

- taxation and public finances,
- labor markets,
- firms, competition, and regulation,
- monetary policy and inflation,
- energy and environment,
- trade policies,
- inequality, demography, and institutions, among others.

Each topic is associated with one or more labels, allowing the classification system to capture the multidimensional nature of policy issues. The retrospective exercise showed that many economic debates naturally span multiple thematic areas — for instance, energy policies intersecting with taxation or trade — and therefore the taxonomy was designed to support **multi-tag classification** rather than rigid single-category assignments.

Examples drawn from the retrospective analysis illustrate how the tagging system was applied in practice. Topics related to energy and international trade included potential questions such as whether imposing tariffs on Russian natural gas imports in 2022 could effectively reduce revenue flows to Russia, combining the tags *Firms, Competition and Regulation* and *Trade Policies*. Fiscal-policy discussions included questions on the reform of personal income taxation and its impact on effective marginal tax rates, categorized under *Taxation and Public Finances* and *Income, Inequality, Demography, and Institutions,*. Labour-market debates involved questions on the introduction of a European minimum wage framework and its desirability for Italy, associated with the *Labor Market* and *Inequality, Demography, and Institutions* tags. Monetary policy discussions included questions on the potential introduction of an anti-spread instrument by the European

Central Bank, associated with *Monetary Policy and Inflation* and *Taxation and Public Finances* classifications. These examples demonstrate how the tagging framework allows a flexible yet structured topic labeling of diverse policy issues.

The tagging system serves three main operational purposes:

1. facilitating expert selection and targeted invitations by matching topic tags with professional expertise;
2. enabling consistent categorization of survey waves over time;
3. supporting future aggregation, filtering, and analysis of results by thematic area.

During the Proof of Concept phase, the taxonomy underwent iterative testing and refinement using the retrospective dataset. This process ensured that categories were sufficiently granular to reflect economic specialization while remaining operationally manageable within the survey workflow. The retrospective analysis also functioned as a stress test for the scalability of the tagging framework, confirming its ability to accommodate evolving policy debates without requiring substantial restructuring. Topics were iteratively validated through internal calibration exercises to ensure cross-wave comparability and methodological consistency.

Overall, the activities carried out in this phase demonstrate that the topic-definition and tagging system provides a robust methodological foundation for the recurring expert survey, ensuring coherence across waves while preserving flexibility in addressing emerging economic issues.

1.4 Expert Pool Construction and Selection Logic

Another key activity of the Proof of Concept phase was the construction of the initial pool of invited experts. The project foresees a panel of approximately 350 economists distributed across academia, public institutions, and private organizations.

The research team developed a semi-structured selection logic based on:

- professional affiliation;
- field of expertise to guarantee a balanced coverage of all the taxonomy domains;
- geographic coverage.

Experts are associated with self-declared expertise labels that facilitate topic-expert matching during survey deployment. The construction of the pool required harmonizing information from multiple sources and preparing a structured database ready for future platform integration.

The objective of this phase was not only to assemble the initial list of participants but also to test the feasibility of managing a dynamic panel that could sustain repeated survey waves over time.

1.5 Privacy, Consent, and GDPR Compliance

A substantial component of the Proof of Concept focused on ensuring full compliance with GDPR principles and data-protection standards.

The project implemented a structured consent and privacy framework, including:

- GDPR-compliament privacy policy and data consent forms providing identity and contact details of the data controller, data protection officer, the purposes of the data processing;
- participation consent forms defining the terms of inclusion in the expert pool;
- restricted access to potential identification data;
- clear separation between individual-level responses and publicly disseminated results.

Personal data collected for the project include basic contact and professional information (e.g., name, affiliation, area of expertise) are used exclusively for communication and participation management purposes.

Survey responses are processed internally by the research team, while only aggregated and anonymized results are made publicly available. This design ensures that individual opinions cannot be traced back to specific participants, thereby aligning the project with principles of data minimization, purpose limitation, and privacy-by-design.

The Proof of Concept phase involved reviewing legal documentation, testing consent procedures on the AMELIA platform, and validating workflows to ensure that participation only occurs after explicit consent is provided.

1.6 Survey Architecture and Methodological Structure

The research team developed a standardized survey architecture aimed at maximizing participation while maintaining analytical consistency. Each survey wave is designed to be completed in less than one minute and typically includes two to three questions addressing a specific economic topic.

Questions are structured around:

- a five-point agreement scale (from "strongly disagree" to "strongly agree") regarding a statement on an economic topic;
- an optional abstention choice;
- a self-reported confidence level associated with each response.

The Proof of Concept included multiple iterations of survey design to ensure clarity of wording, consistency across topics, and usability on digital devices. Particular attention was devoted to

balancing scientific rigor with accessibility, as the project aims to communicate aggregated expert opinions to a broader audience.

1.7 Digital Infrastructure and Technological Testing

The technological implementation of the project was developed in collaboration with Exprivia through the AMELIA platform. During the Proof of Concept phase, extensive testing was conducted to validate key components of the digital infrastructure, including:

- expert invitation workflows,
- consent and GDPR-compliant participation procedures,
- survey deployment mechanisms,
- data aggregation and visualization functionalities.

Rather than focusing on advanced technological customization, the main objective of this phase was to verify the operational feasibility of the platform, ensuring stability, scalability, and compliance with privacy-by-design principles. The research team and technical partners carried out multiple iterative testing cycles aimed at refining the survey interface, improving response tracking, and validating the production of aggregated outputs suitable for public dissemination.

The testing phase confirmed that the AMELIA platform provides a solid foundation for hosting recurring survey waves and managing expert participation. However, the activities carried out during the Proof of Concept also highlighted that **some technical aspects require further refinement before the effective launch of the initiative**. In particular, additional improvements are needed to optimize workflow automation, streamline the management of recurring survey waves, and enhance the user experience for both participants and administrators.

These remaining adjustments do not affect the overall feasibility of the project but represent a necessary step toward transitioning from a testing environment to a fully operational infrastructure. The collaboration with Exprivia will therefore continue in order to finalize technical optimizations and ensure that the platform can support the regular implementation of the survey in a stable and efficient manner.

1.8 Output Structure and Public Dissemination Logic

The Proof of Concept also explored how survey results will be presented to external audiences. Individual responses remain accessible only to the research team, while public outputs consist exclusively of aggregated statistics such as distributions, means, and medians of responses.

The design of result visualization aims to make expert opinions accessible for the public. Preliminary testing evaluated alternative presentation formats to ensure clarity for non-technical users while preserving methodological transparency.

1.9 Status of Implementation and Concluding Remarks

At the conclusion of the Proof of Concept phase, the project has achieved a set of key milestones that establish the methodological, governance, and technological foundations of *"The Floor to the Experts"*. In particular, the activities carried out during this phase led to:

- the development of a governance and scientific oversight framework supporting recurring survey waves;
- the definition and validation of a structured topic taxonomy and multi-tag classification system, grounded in a retrospective analysis of policy debates;
- the construction of an initial expert pool, including the assignment of expertise labels to facilitate targeted participation;
- the implementation of GDPR-compliant privacy consent procedures and data-management workflows based on privacy-by-design principles;
- the testing and refinement of a standardized survey architecture aimed at ensuring clarity, rapid completion, and comparability across waves;
- the validation of the technological infrastructure developed in collaboration with Exprivia through the AMELIA platform.

Overall, the Proof of Concept confirms the **operational feasibility** of the initiative and demonstrates that the core scientific and methodological components are fully defined. The tagging system, governance structure, and survey design provide a coherent framework capable of supporting recurring expert consultations on rapidly evolving economic topics.

At the same time, the activities carried out during the technological testing phase highlighted the need for **additional technical refinements** before the effective launch of the initiative. In particular, further improvements are required to optimize workflow automation, streamline recurring survey management, and enhance the overall user experience. These adjustments represent a natural step in the transition from a testing environment to a fully operational platform and do not affect the overall validity of the Proof of Concept.

In light of these results, the project can be considered **validated at Proof-of-Concept level**. The initiative is therefore positioned to move from conceptual and testing activities toward the

progressive implementation of recurring survey waves and the public dissemination of aggregated expert insights, subject to the completion of final technical optimizations.