



Stakeholder mobilisation and co-creation:

A Charter for CrossGov researchers

Deliverable 5.3





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Abstract	This deliverable presents a one-page Stakeholder mobilisation and co-creation Charter (Annex 1), outlining key principles and rules to be followed throughout the project by CrossGov researchers/partners.
Keywords	Stakeholder mobilisation, engagement, co-creation, Charter, principles, partners

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Context of the Charter

Stakeholder mobilisation and co-creation are two **central principles** transversally applied to all Work Packages (WP) and tasks carried out in **CrossGov**. Their application will ensure that research results, policy recommendations and products supporting the wider dissemination of project results (e.g., the interactive roadmap and the blueprint to strengthen Science-Policy-Society (SPS) interface of WP4) are robust, relevant and fit-for-purpose to support policy making.

Experiences in different EU research projects illustrate that **the application of these principles can be challenging**. This can result *inter alia* from: insufficient expertise and capacity; too limited resources (time) allocated to the sound application of the principle; different understandings of what the principles imply for researchers implementing research activities; different views on the scientific value of stakeholder processes and the knowledge they generate.

A Charter: what for?

Under CrossGov's Task 5.1 *Co-Creation and System Approach Framework*, we have proposed to co-develop (together with all partners) a **Stakeholder mobilisation and co-creation Charter** that translates the principles into a series of operational "to do" principles each CrossGov researcher commits to.

The process followed to **co-develop** this Charter will mobilise partners' experiences in stakeholder engagement. It will ensure a common understanding of what stakeholder mobilisation and co-creation imply in concrete terms, which will afterwards be included in the internal operational guidance note (see below). This process will help each partner to **reflect** on **how best to apply** these principles, accounting for contextual elements and focus of different activities with the stakeholders (for example in different case studies).

The draft text of the Stakeholder Mobilisation and Co-creation Charter has been developed as a one-page template, outlining **key principles and rules** to be followed throughout the project by CrossGov partners. The draft text of the Charter is presented in Annex I of this deliverable. It will guide the design of research activities from the beginning of the project to deliver co-creation.

The charter will be **electronically signed** by a **representative of each partner** (on behalf of all researchers from each organization involved in CrossGov activities) as soon as possible after the start of the project. This signature will demonstrate individual and collective commitments to the principles. It will steer their sound application throughout the CrossGov project time life.

Supporting the application of the Charter's principles

This Charter signed by the consortium will be complemented by:

- An **operational guidance** on “stakeholder mobilisation” to support research activities carried out under WP1, WP2, WP3 and WP4; an internal document, which explains the logic and the process of working with the stakeholders at different moments of the project. This guidance will include also all partners’ experience working with stakeholder mobilization and living lab, and will illustrate methods to mobilise stakeholders and facilitation techniques. It will also include tools that can be applied to monitor and evaluate the added-value and relevance of individual stakeholder events and of the entire co-creation process - for CrossGov researchers and for all stakeholders involved;
- A **stakeholder tracking tool** (or stakeholder list – see Deliverable D5.2) that will help monitoring the stakeholders mobilised (who, when, how and with which outcomes/implications) in all activities carried out under CrossGov. The tracking tool will facilitate interactions between CrossGov partners and stakeholders, avoiding duplication of efforts and facilitating synergies; and
- A **Stakeholder Mobilisation Charter for “external use”**, signed (or confirmed electronically by) partners and external stakeholders mobilised in CrossGov research activities carried out under WP1 to WP4, in particular under WP3 case studies. This second (external) Charter will be presented in Deliverable 5.4.

Co-developing the Charter: how?

A **first draft version of the Charter** has been developed by ACTeon in task 5.1. The Charter principles are based on the seven Core Principles of Public Engagement¹ that are the foundational practices government officials, elected representatives, public administrators, civic-engagement professionals, conflict-resolution facilitators, and others need to apply to promote more effective, open, and equitable public participation in government decision-making. The principles were adapted to the nature of CrossGov and its partners to ensure effective collaboration and co-creation take place in the project.

This draft version will be the **basis for discussions with all CrossGov researchers** via: (a) facilitated discussion under the CrossGov shared Teams – collecting views, practices and proposed adaptations in the first draft; and (b) a two-hour collective meeting building on individual contributions to adapt and modify the draft charter so it responds to CrossGov’s needs. A new version of the charter will be then produced by ACTeon – and shared on Teams for final comments and agreement. The clean format of the charter will be then developed.

Once (electronically) signed by all CrossGov researchers, the signed charter will be uploaded on the project shared Teams and on the EC portal.

¹ Source: *Core Principles for Public Engagement* (2009) published by the National Coalition for Dialogue and Deliberation, International Association for Public Participation, Co-Intelligence Institute: <https://organizingengagement.org/models/core-principles-for-public-engagement/>

Annex 1. Stakeholder mobilisation and co-creation: A Charter for CrossGov researchers

By signing the present charter, as researcher involved in the activities of the CrossGov project, I commit myself to apply the following stakeholder mobilisation and co-creation principles:

- **Set clear objectives and the “rules of the game” from the start, accounting for needs and demands of associated stakeholders.** *When preparing and organising the stakeholder mobilisation process, I will identify and understand stakeholders’ needs, demands and constraints. I will see how I can best account for these in CrossGov’s research activities. I will share needs and demands that cannot be met by CrossGov with the Coordinator and Core Group;*
- **Ensure the right conditions are set for stakeholders to participate effectively in discussions and debates.** *I will pay particular attention to the quality and relevance of communication and information sharing so it is adapted to (the types of) stakeholders mobilised. I will organise and facilitate dialogues that enable trust among participants. I will provide adequate time for collective understanding to emerge and for discussions to evolve;*
- **Carefully plan and prepare interactions and debates with stakeholders.** *I will organise forms of interactions that are fit-for-purpose and account for (my and stakeholder) constraints and opportunities. I will ensure well-prepared design, organisation (including transparent roles and clear timelines) and convening of the stakeholder mobilisation process so it serves clearly defined purposes and objectives;*
- **Favour inclusiveness, diversity and equity.** *I will incorporate a diversity of stakeholders (including in terms of gender and age balance), voices, ideas and information to lay the groundwork for quality outcomes and legitimacy. Through facilitation, I will provide conditions for stakeholders to equally share their knowledge, views and concerns;*
- **Foster open-mindedness and learning.** *I will help stakeholders involved to listen to each other, explore new ideas unconstrained by predetermined outcomes, learn, and apply information in ways that generate new opinions. I will myself be open to new ideas, considering all views and ideas expressed (including when these question earlier research and evidence) and proposing adaptations in CrossGov activities, results and deliverables that account for these views and ideas; and*
- **Be transparent and reflective about your stakeholder process.** *I will systematically provide a record of the organisers, sponsors, outcomes, and range of views and ideas expressed (with the help of internal stakeholder tracking tool/database, described in D5.2, which will respect private data use and will be in compliance with the EU GDPR rules.) I will report in a transparent manner to associated stakeholders how their views and ideas have been considered. Together with stakeholders, I will regularly evaluate and reflect on the process and its outcome and propose adaptations to address challenges and improve the process.*

If I encounter difficulties in applying these principles in my stakeholder process, I will share difficulties with associated stakeholders and with the CrossGov team so solutions can be identified together.

Date, place:

First name, LAST NAME, structure or institution:

E-Mail:

(Electronic) signature: