



Coherent & Cross-compliant Ocean Governance for Delivering the EU Green Deal for European Seas

Deliverable 5.4

Stakeholder Co-creation and Mobilization Charter



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Abstract	This deliverable presents a brief overview of the CrossGov's approach to co-creation and engagement of stakeholders, implementations steps, outputs, and tools. It also focuses on the Stakeholder Mobilization and Co-building Charter to be signed by CrossGov partners and external stakeholders.
Keywords	Stakeholder mobilization, co-creation

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Change Records

VERSION	DATE	CHANGES
1.0	27.02.2023	First version submitted for review.
2.0	1.09.2025	<p>P.5 – Edit of “stakeholder” definition to include local actors.</p> <p>P.5 – Removal of “Living Labs” concept, to reflect work being carried out in CrossGov.</p> <p>P.5 – Inserted Diagram 1 of CrossGov Stakeholders.</p> <p>P.5 – Edit of “Co-creation” definition to exclude dissemination. Dissemination is understood as a separate concept to co-creation.</p> <p>P.12 – Edited definition of “Stakeholder Forum” to reflect work being done within the project and the breadth of engagement activities taking place.</p> <p>Annex 2 – Updated annex 2 to describe activities planned for the stakeholder forum in the final year of the project.</p>

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Introduction

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

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

In order to **achieve a common view of the researchers of CrossGov on stakeholder engagement and co-creation** in CrossGov, the work has started from the very beginning of the project. The main principles and approach for it were already laid out in the Deliverables 5.2 (Stakeholder list) and 5.3 (one-page Stakeholder mobilization charter).

This deliverable presents further advanced approach (after literature review and internal workshop with research partners) that CrossGov will be following for the stakeholder engagement and co-creation.

In this deliverable we focus on the brief overview of the terms and definitions and principles (p. 4) and shortly briefly present the approach which will guide the co-creation (p.5), showing links between different processes and steps of the process of the ‘co-creation in CrossGov’ as well as expected outputs (p.8) and frequency and the different formats of stakeholder engagement we will use for co-creation (included in the forthcoming internal operational guidance). The deliverable further describes the tools which will be used to support the stakeholder co-creation process in CrossGov (p.9)

The deliverable concludes with a section on the **Stakeholder Mobilization Charter for "external use"** to be signed by partners (annex 1) and **activities planned for the stakeholder forum in the final year of CrossGov** (annex 2).

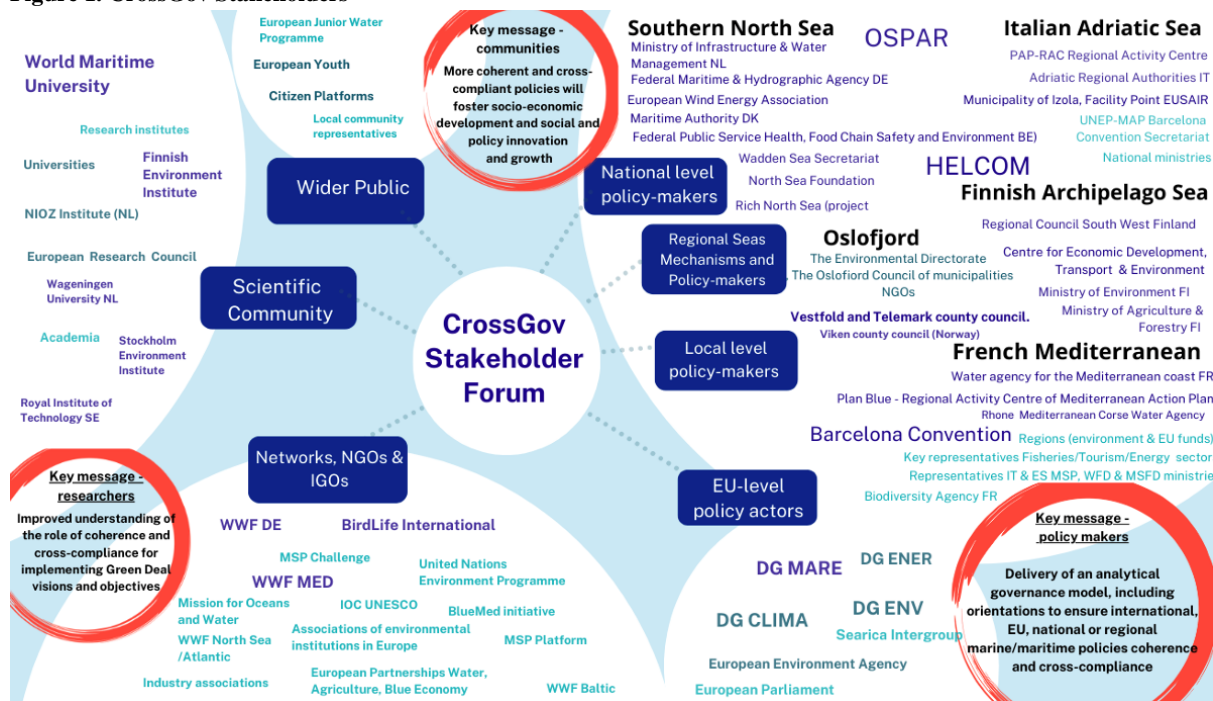
Based on the concept and tools presented in this deliverable, CrossGov is developing an internal ‘operational guidance’ for its researchers, WP1, 2 and 3, with detailed step by step explanation (including examples of tools, templates, best practices) on how to engage stakeholders at each step, including tracking and monitoring and evaluation of the added value. This guidance will be shared with the research partners by end of March 2023 and training will

be organized on how to use specific tool, such as stakeholder database, mobilization charters in the work of the case studies.

Co-creation in the context of CrossGov: terms and definitions

There are many definitions of stakeholder engagement and co-creation. In CrossGov we define relevant **stakeholders** as individuals involved and/or interested in policy making and policy implementation in the relevant marine policy areas. They are public government actors, NGOs/civil society, related industry groups, the research community and groups involved in both law and policy formulation, as well as application and implementation, from the EU and regional to national and local levels of governance.

Figure 1. CrossGov Stakeholders



Under **co-creation** we refer to a process of integrating stakeholders into the research design, implementation and validation. In the frame of CrossGov, the stakeholders are involved in the identification of challenges and opportunities related to coherence and cross-compliance. This ensures that orientations are informed by the relevant actors and authorities involved in implementation and policy design. Secondly, the stakeholders are involved in the co-creation of innovative proposals and roadmaps to enhance cross-compliance in diverse policy and geographic areas within Europe.

Through the co-creation process, a relationship based on trust is built with stakeholders. The co-creation process begins by establishing this trust by working together from the very start. The stakeholders are involved in the **co-development of research questions**. Then they are involved in **identifying challenges** due to their experience and competencies in the field. Participating in this co-creation process allows the participants to feel that their concerns are

considered and leads to more willingness to participate in the research and decision-making process.

To develop a sound approach to stakeholder mobilization and co-building in CrossGov, we have undertaken a literature review of different approaches/tools and collected partners' experiences. These were presented and discussed at two internal workshops (December 2, 2022 and January 10, 2023 with a significant representation of CrossGov partners being present). After co-creation workshops and revision of the methodologies and tools, the approach presented in the JRC (2022) report became the building base for stakeholder mobilization in CrossGov.

Principles for co-creation in CrossGov

After discussions and exchange of thoughts in the two internal workshops, the project partners agreed to adopt the JRC (2022) principles for co-creation in CrossGov :

- **Clarity of scope and purpose** - The boundaries and the intention of the entire research process, including the project workshop(s), must be identified and clearly determined. It should be ensured that decisions relevant to the previously specified research needs are enabled, along with the commonly defined and shared goals.
- **Focus on outcome and transparency** - Expectations and expected outcomes must be defined early to ensure optimal results. The outcomes and the entire research process need to be transparent to whomever it might concern by using appropriate visual techniques and communication.
- **Inclusiveness and representativeness** –To ensure an ideal development of collective intelligence, as well as the legitimacy of the process, the appropriate participants should be selected in terms of individual expertise, representation of all the relevant stakeholder groups and diversity of perspective¹. The parties concerned with the targeted policy context should have their knowledge valued and the mandate to shape decisions through the entire process while simultaneously building trust among each other to create agency for transformation.
- **High-quality tailored process** - The design of the participatory elements has to be closely adapted to the specific needs and constraints of the process it serves. In particular, while the selected formats should be based on experience and draw on well-established methods, the overall process must be closely tailored to suit the identified needs. (To ensure good outcomes, the participatory moments must be prepared with care and executed professionally.)
- **Systemic perspective** - The process must help the participants to develop an 'out-of-the-box' understanding of the issues at stake. This is essential for understanding the positioning and dependency of the discussed topics on external factors, connecting the parts to the whole, avoiding 'tunnel thinking' and building coherence of actions. Developing a holistic, systemic perspective ensures the robustness of the outcomes.

¹ A suggested process will be included in the Internal operational guidance

These principles reflect the philosophy and nature of the co-creation and mobilization in CrossCov. These principles were at the basis of the Mobilization Charter for CrossGov Researchers (See Deliverable 5.3).

Methodology and implementation steps

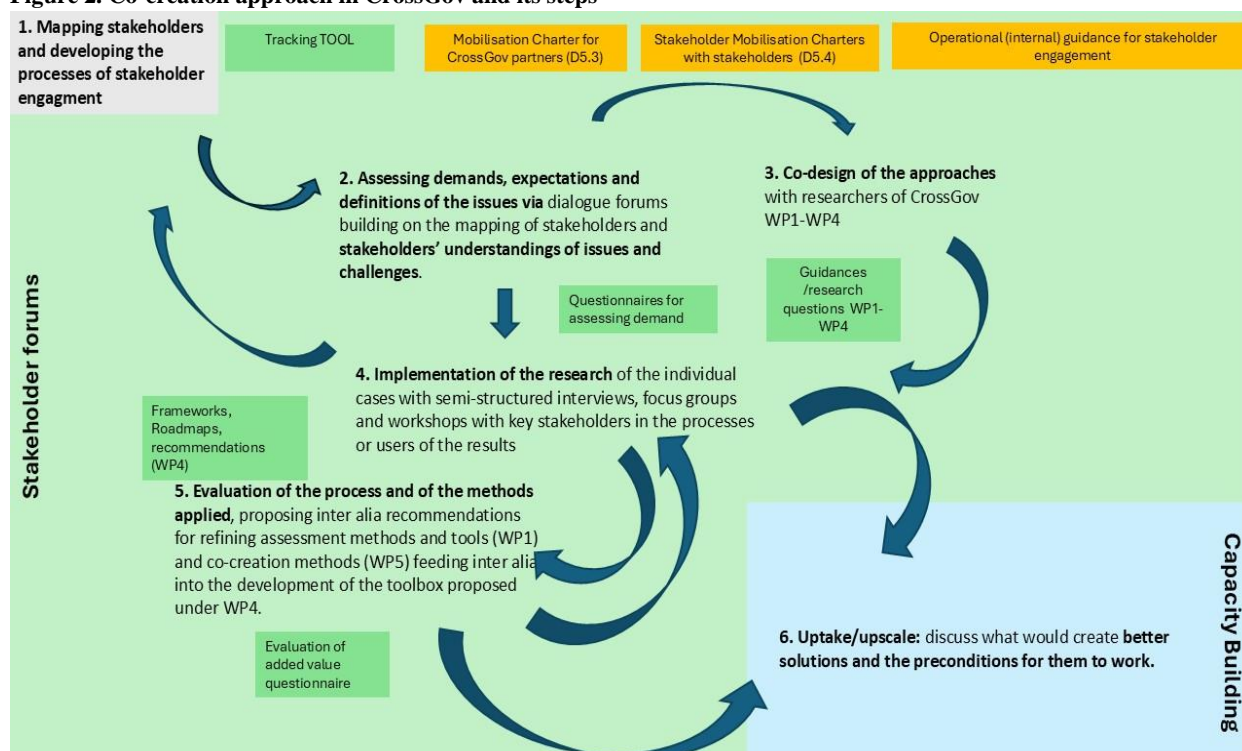
Extensive literature review was carried out under task 5.1 on general co-creation and engagement frameworks and tools (including Brower et al 2015, Cvitanovic and Hobday, 2016, 2018, JRC 2022), multi-actors platforms (Nesheim et al 2021, Brower 2016), as well as marine and policy specific literature (Mauser et al. 2013; Ramirez-Monsalve and Van Tatenhove, 2020, Pope and al. 2019). Living Labs (LL) approach and its toolkits (ENoLL) was also studied, as it is based on an iterative process for co-creation and learning with users, which allows to evaluate and adapt the results/recommendations from year to year.

Project partners' experiences with different frameworks and tools for stakeholder engagement in different projects were collected and analyzed as well. After this analysis we propose to have the following three **step approach to co-creation in CrossGov**:

1. **(Before) Co-design** - Definition of the issues, mapping and co-design of approaches to be followed in WP1 -WP4
1. **(During) Exploration and Implementation** - research in case studies (WP3)
2. **(After) Evaluation and Validation** (including conclusions, added value) and recommendations for uptake/upscale (WP4)

Following this approach, we propose the following **key steps to implement the co-creation approach** in CrossGov:

Figure 2. Co-creation approach in CrossGov and its steps



To properly mobilize stakeholders, they should be involved in the three phases (see part 1, 3 steps framework of Crossgov) of the project design. Stakeholder mobilization does not only imply to incorporate their concerns into the planning/process, it means for them to participate in each step of the process (Cvitanovic, 2016).

Following from the diagram 1, we translate the different steps and put them in the proposed framework of co-creation of CrossGov below:

Table 2. Implementation steps of co-creation in CrossGov framework

BEFORE	<ol style="list-style-type: none"> 1. Mapping stakeholders: initial identification of the stakeholders have been done in the proposal stage as well as in the deliverable 5.2 – Stakeholder list. This list is to be revisited by each case study (following instructions and toolkits presented in the internal operational guidance and case study guidance) and recorded into the stakeholder database. 2. Assessing demands and definitions of the issues via dialogue forums building on the mapping of stakeholders and stakeholders’ understandings of issues and challenges. These will be used to focus CrossGov research with more specific research questions and hypotheses on mechanisms that contribute to policy integration delivering the GD objectives. Stakeholders’ expectations to the co-creation process will be used to streamline participatory processes in and between cases. 3. Co-design of the approaches with researchers of CrossGov WP1-WP4 - the
DURING	<ol style="list-style-type: none"> internal operational guidance will include detailed step by step explanation (including examples of tools, templates, best practices) on how to engage stakeholders at each step, including tracking and monitoring and evaluation of the added value 4. Implementation of the research of the individual cases. Methods will primarily be examination of documents from planning and policy processes under study and semi-structured interviews with key participants in the processes or users of the results. Cross-case comparisons of similarities and differences between the individual cases in regard to policy integration, explanations of which mechanisms explain these, and conclusions on barriers and enablers for better policy integration. Researchers' results will be vetted by stakeholders in workshops or focus groups.
AFTER	<ol style="list-style-type: none"> 5. Evaluation of the process and of the methods applied, proposing inter alia recommendations for refining assessment methods and tools (WP1) and co-creation methods (WP5) feeding inter alia into the development of the toolbox proposed under WP4. 6. Uptake/upscale: a second step of dialogues will discuss what would create better solutions and the preconditions for them to work.

Expected outputs of co-creation

As can be seen in the diagram and table above, we will engage stakeholders in different phases and steps with the following outputs which we foresee from this co-creation and engagement:

- First, within CrossGov products delivered, co-creation processes will be implemented throughout the different WPs:
 - **the assessment framework under WP1** – co-created with experts and users that are applying similar frameworks and will apply it in the future,
 - based on evaluation of the process and the methods applied, proposing inter alia recommendations for refining assessment methods and tools (WP1) and co-creation methods (WP5), feeding inter alia into the **development of the toolbox proposed under WP4**.
- On a level of case study:
 - **Overarching research questions** across case studies WP3 with case study leaders and stakeholders; Specific case research questions will be refined with the stakeholders.
 - **Cross-case comparisons of similarities and differences** between the individual cases regarding policy integration, explanations of the mechanisms, and **conclusions on barriers and enablers for better policy integration**
 - **Policy recommendations in the case studies under WP3** – co-developed with relevant stakeholders targeted by these recommendations and in charge of their application,
 - **Co-creation of the training material under WP5** – co-developed with “trainers” - project partners who would be implementing co-creation in the WPs and case studies of the CrossGov.

Frequency and formats of the co-creation processes in CrossGov

The **frequency of interaction with stakeholders** for co-creation activities will depend on the specific organization of each project task and case study. In any case, it will take into account the issue of stakeholder fatigue, and it will be designed to reduce stakeholders' time and efforts to a minimum.

During all three phases (BEFORE, DURING, and AFTER) (see Table 1) the researchers of CrossGov will use different **formats** to engage with the stakeholders, using communication by email, phone, online, hybrid and in-person events (such as questionnaires, interviews, focus groups, workshops, observations, dialogue forums with key participants in the processes or users of the results).

Detailed guidance on use of these formats, including facilitation is being developed and will be presented to project partners in the ‘**operational guidance**’ internal document. All of the interactions with the stakeholders will be tracked and monitored with the help of the

stakeholder database (Deliverable 5.2). These activities and their formats will be streamlined and aligned with the guidances from WP1, WP2, and WP3 case studies.

Tools supporting co-creation and engagement processes

Implementation steps of the co-creation and engagement process identified in Diagram 1 and Table 1, will be supported by several tools/documents/processes:

- An "**internal operational guidance on stakeholder mobilization**" to support research activities carried out under WP1, WP2, WP3 and WP4. This internal document, explains the logic and the process of working with the stakeholders at different project moments. This guidance illustrates methods and tools to mobilize stakeholders and **facilitation techniques**. It includes, among others, guides to construct surveys and tips to organize interviews, as well as other practices from existing guides and toolkits that will help operationalize each of the five co-creation principles. It includes also the description of **tools** that can be **applied to monitor and evaluate the added** and relevance of individual stakeholder events and the entire co-building process - for CrossGov researchers and all stakeholders involved.
- A **stakeholder tracking database** (or stakeholder list – see Deliverable D5.2) that will help monitor the stakeholders mobilized (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 and fostering synergies. The prototype of the database has been created and is currently being tested by the project partners.
- **Stakeholder Forums**: The CrossGov ‘Stakeholder Forum’ refers to the stakeholder engagement and co-creation activities within the content focused tasks of CrossGov (WP1-4) and the capacity building task in WP5. The ‘Stakeholder Forum’ is not a specific physical or digital space but takes on its form depending on the co-creation and stakeholder engagement needs of a specific task. Within WP4, Stakeholder Forums are being implemented in the context of the CrossGov Compass, Coherence Toolbox and SPSI Blueprint. See Annex for more information. Participants in the Stakeholder Forums will not go through any application process but just express interest in/register for knowledge-sharing events and workshops, as well as decide to provide contributions that become part of the public good and are accessible to all
- **Mobilization Charters**: Two mobilization and co-creation charters, ensuring the commitment of partners (a template Charter document was already presented in D5.3) and external stakeholders (see details below, and annex I) to the co-building processes of CrossGov.

Stakeholder Mobilization Charter with external stakeholders

While the research partners committed to principles that will ensure inclusiveness and co-creation in the stakeholder processes (D5.3) and agree to map/track/monitor stakeholder activities in the database (D5.2), it is crucial to get the commitment of the stakeholders themselves and mutual understanding and commitment between researchers and stakeholders. For this purpose, this deliverable focuses on a "reciprocal" **Mobilization Charter**, which has also been developed as a one-page document/template outlining key commitments and rules to be followed throughout the project by CrossGov partners and external stakeholders. The draft text of the Charter is presented in Annex I of this deliverable.

The charter is divided into two parts: what the researchers of CrossGov are committed to and what the stakeholder is coming to do during the project's timeline.

Diagram 1 proposes that both Stakeholder Mobilization Charters are co-developed early in the process. The charter for external stakeholders is to be signed by those at the beginning of the process after the first contacts have been made and interest is confirmed. The text of the charter template can then be individually adapted (to the needs of a case study/stakeholder's role). It will then be signed by the CrossGov partner carrying out the task (or the respective WP lead) on one side and the stakeholder concerned on the other. This confirmation will be done either with an electronic signature or by email.

The charter also mentions the informed consent, which has to be given by research participants separately to the signature of the Mobilization Charter, as this is a requirement for respecting the ethical principles and IPR framework under HE projects (Informed consent form, Annex to D6.2 Strategy for addressing Ethics and the IP). Moreover, the charter references the data protection management in CrossGov and how the project deals with GDPR-related data.

This short document, outlining the approach and the process of stakeholder engagement and co-creation foreseen in CrossGov, will be introduced to the stakeholder before signing the Charter. This document will be complemented by an infographic (designed by ACTeon) where the expected involvement of the stakeholders and added value for them will be already outlined. This document will be shared with all partners (together with the charter template) before the first contact with the stakeholders is made.

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Annex I: Template for Mobilization Charter for stakeholders

Through the present document, I acknowledge the importance of the stakeholder processes developed in the CrossGov project.

As a CrossGov partner, I commit to the following:

- Explain the process/approach to the participants/stakeholders
- Involve and inform on time in advance about activities planned
- Clarify any questions that may arise
- When scheduling activities, I try to minimise stakeholder fatigue
- Respect the timing allocated to the activities
- Keep all the private data and exchanges confidential (under GDPR rules)
- Share and validate the results with the stakeholder before making them public

As a stakeholder, I commit that to the best of my availability, I will :

- Take part in the activities proposed by CrossGov partner
- Join the Stakeholder Forum and its activities
- Respect rules/ deadlines set by the CrossGov partner
- Notify CrossGov partner in time if not available and make efforts to reschedule
- Participate in the collective exercises for co-building
- Respect the opinions of others
- Share information about CrossGov in my networks
- Disseminate key results and outputs for broader reach and upscaling

As a stakeholder, the frequency of engagement, the formats and outputs were clearly explained to me by the CrossGov project partner (researcher) who approached me.

Both parties agree to engage in the process for the duration of the CrossGov project (31.08.2025). They will, if necessary, adapt the approach to our engagement to the specific needs of the particular case study, policy analysis and development, possibly with further ad-hoc activities.

Moreover, both parties are aware of the data management principles and application of the GDPR framework, as was the project's strategy for Ethics and IP. The stakeholder as a research participant has also given informed consent in case deemed necessary.

Date, place

Name, organisation, and signature of CrossGov representative

Date, place

Name, organisation and signature of the stakeholder

Annex II. Stakeholder Forum - What is planned in the final stage of the project?

The CrossGov ‘Stakeholder Forum’ refers to the stakeholder engagement and co-creation activities within the research focused tasks of CrossGov (WP1-4) and the capacity building task in WP5. The ‘Stakeholder Forum’ is not a specific physical or digital space but takes on its form depending on the co-creation and stakeholder engagement needs of a specific task. This includes engaging stakeholders through interviews, focus groups, surveys, and workshops.

Status of the Stakeholder Forum through 08/2024

Through August 2024, 81 stakeholders were directly involved in the development of CrossGov deliverables (WP1-3), a significant increase since the end of the first reporting period in February 2024, where 56 had been engaged. The majority of the stakeholders that have been reached through co-creation activities are from the public sector (circa 75%). Stakeholders have been integrated into the research at the case study level (WP3) as well as in the production of deliverables examining the EU level (WP1, WP2). Stakeholders from all levels of governance have been reached, reflecting the work of the consortium to study coherence at all levels of governance.

Outlook for the Stakeholder Forum in the final year of the project

The involvement of stakeholders and potential end-users in the project is currently increasing and particularly deemed important and feasible in WP3, 4 and 5.

- Stakeholder Forums in WP4:

In the second phase of the project, WP4 plays a crucial role. In this WP, the stakeholder forum will be fully operational with smaller stakeholder forums established. For the **Coherence Compasses -T4.1 (previously referred to as roadmaps)** planned in WP4, partners have been divided into three working groups with a focus on *offshore wind*, *agriculture* and *eutrophication*, and *fisheries*. Within each thematic area, a stakeholder forum will be formed consisting of stakeholders from EU, national and cases study levels. The meetings of these groups will be held to share and validate findings, collect input and discuss ways forward. Further, recommendations for improving coherence, considering inherent conflicts of interest, will be discussed. The first meeting on Offshore Wind is scheduled for the end of November 2024.

The Coherence Toolbox - Task 4.2 is in the process of identifying the list of potential end-users and a plan of action for their involvement in the creation of the final toolbox on policy coherence will be developed in September-October. Some of these potential end-users have already been identified earlier in the project, as well as through targeted outreach on LinkedIn,

building a good foundation for further engagement. In the autumn 2024, a series of workshops will be organized targeting the different types of end-users (research community, policy-making community, and other) to present the methodological framework, collect feedback and insights and map the needs for different products based on the framework. This interaction will be used to design the final format of the products and the dissemination activities for Spring 2025.

Within the **SPSI Blueprint - Task 4.3**, a stakeholder forum will be established for the purpose of developing the final products to be optimally aligned with the needs of our end users. In the SPS Stakeholder Forum, we aim at co-developing a blueprint suggesting recommendations to overcome the identified challenges on SPSIs and support better informed and knowledge-based policy-making and decision-making towards the Green Deal objectives of relevance for CrossGov. The SPS Stakeholder Forum will be composed of around 10 participants from our Project Advisory Board, DG RTD, DG ENV, DG MARE, JRC, EEA, GFCM, WWF, in addition to a couple from our Project partners. The participants will be involved in the form of a Focus Group and will meet online twice between October/November 2024 and February 2025; each meeting will have a total duration of 2 hours. The objectives are to present to the participants our findings from the SPS analysis conducted in WP2 and WP3 and collaborate with them to build the recommendations part of the blueprint.

- **Capacity Building with Stakeholders in WP5:**

To ensure that CrossGov's results, recommendations and outcomes are made available, widely disseminated and ready for uptake by a wide range of stakeholders and decision-makers in addition to co-creation activities with stakeholders we need to also plan capacity building.

When CrossGov concepts, assessment methods, results and recommendations are developed we will need to share these with current and future professionals, stakeholders and decision makers. Thus, the capacity building **will be strongly linked with the work carried out in the other WPs**, especially WP3, WP4 and WP5 – in terms of content creation and timing of activities organized in these WPs (including different strategic events that CrossGov will attend or other activities of Stakeholder Forum (see Annex II).

CrossGov capacity building and exploitation activities will gain momentum from M24 through the launching of a call-to-action campaign targeting the main stakeholder groups. The campaign will build on the project deliverables for each target group complemented by tailored summaries, key messages, and recommendations on how CrossGov results could be taken up into future practices and processes of each.

The following 'trainings' will be carried out to reach 3 different groups of stakeholders in the capacity building:

Table 2. Target audience and training table

Target audience	Content of modules	Preparation materials	Testing
1. Researchers, consultants, analysts	Series of webinars: <ul style="list-style-type: none"> - Problem identification and presentation of case studies 	Videos about assessment framework and guidance based on	Series from end of March - end of May (save the dates to be

	<ul style="list-style-type: none"> - What we offer as solution - Methodology - Sectoral recommendations from WP4 - How to improve and use in your work? 	outputs from frameworks, SPSP and case studies.	defined by end of November)
2. Policy making community: consultants, analysts, EC policy officers, national, planners	<ul style="list-style-type: none"> - Same as webinar content listed above, but also including tool on assessment framework, tutorial of how to use it, key recommendations, and testimonials from users 	Materials listed above, plus the Coherence Compasses	Final event, date tbd
3. Students, early career professionals in environmental policy	<p>“Policy made easy: Connections between EU Ocean policy:</p> <ul style="list-style-type: none"> - <i>What is the Green Deal?</i> - <i>Why do we need policy coherence?</i> - <i>What tools are available?</i> - <i>How do I use them?</i> 	Videos produced for webinars series and real lectures, plus tasks for students	During summer school (date and place tbd)

While webinars could be disseminated on their own, creation of MOOC will allow to use the materials developed after the end of the project, as a targeted training.

The Summer School: place and dates to be still confirmed whether it will be part of existing summer schools (such as in University of Utrecht) or a summer school organized together with Permagov. It will allow to test and improve training materials and approaches as well as to engage and train 20-30 young professionals/future policy makers on marine policy coherence.

In addition, CrossGov will also make specific efforts to connect with influential stakeholders and policy makers by being present at their key events, such as:

- MSP event in Marseille (October 2025)
- Mission Ocean Lighthouses (BANOS North Sea in Amsterdam 26-27 November)
- EU Ocean Days in March 2025 in Brussels
- Blue Mission BANOS in Poland – April 2025
- Also, side events organised by the EP or the Committee of the Regions, tbc..

These milestones would be used to disseminate also information on upcoming trainings, and findings.

CrossGov will also capitalise on opportunities to **link with existing institutions, networks and campaigns** organized by scientists, governments and other relevant actors. Instead of setting its own CrossGov process like many research projects, CrossGov will favour dialoguing and partnering with established networks, partnerships and platforms to gain their visibility; and reach broader audiences than what would have been the case with own

events. This will help internalising CrossGov research, thinking and results into well-established events, such as:

- Mission Ocean and Waters Lighthouses (for example BANOS events in Amsterdam and Poland)
- European Water & Agriculture Partnerships, and European Blue Economy Partnership.
- IOC UNESCO (workshop at One Ocean Congress in June and UNOC)
- WFD and MSFD CIS processes managed by the EC
- Sister projects – PermaGov, MSP4Bio +
- Other initiatives/processes proposed by Advisory Board members, so the key events and dates will be aligned with their activities, and they could take part in the training or other capacity building activities of CrossGov.