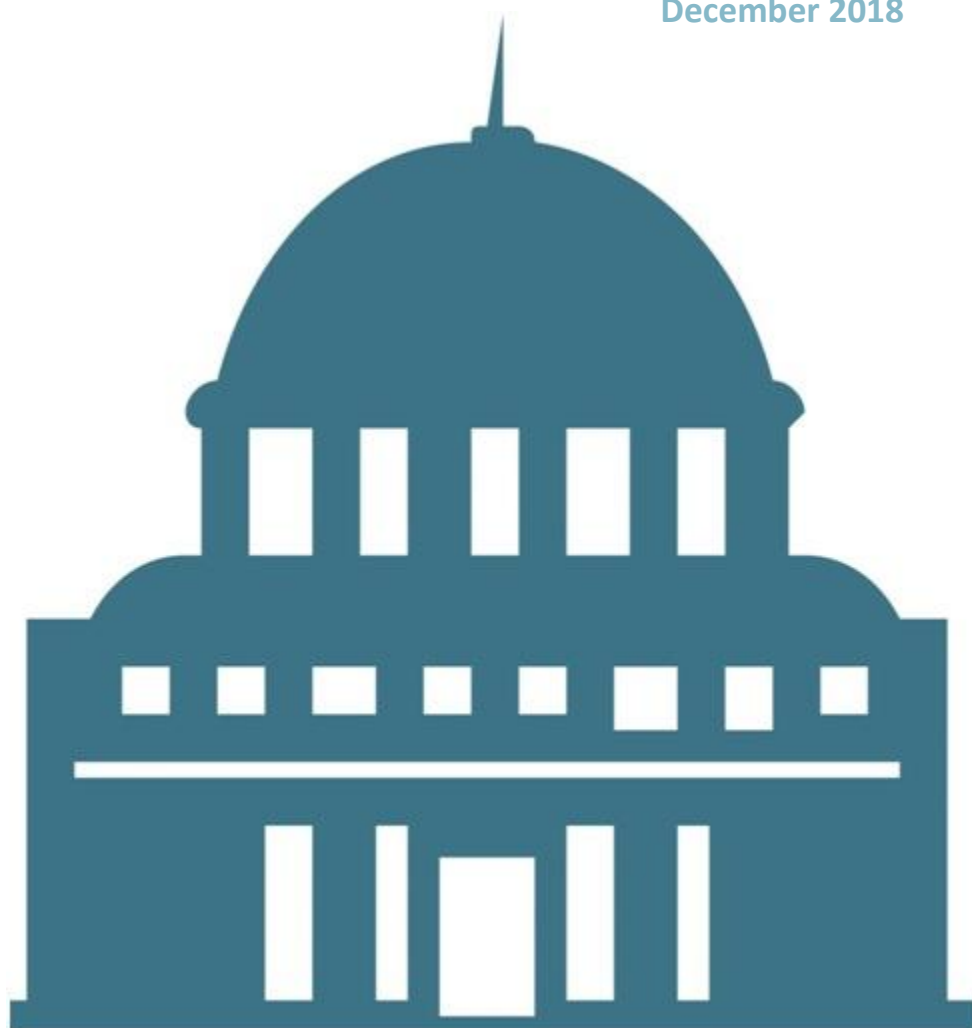

Guide to identify and engage stakeholders

PANORAMED

December 2018



CONTENTS

IDENTIFICATION	2
1. INTRODUCTION	3
1.1 What is a stakeholder?	3
Definition	3
Categories	4
1.2 Why is it important for PANORAMED to identify and engage stakeholders?	4
What can stakeholders do for PANORAMED?	5
2. IDENTIFYING STAKEHOLDERS	6
2.1 The existing methodology	6
2.2 Additional tools	6
First steps	6
Classification based on level of interest	7
3. ENGAGING STAKEHOLDERS	8
Difficulties you may encounter trying to engage stakeholders	8
How can you overcome those difficulties?	8
Engagement plan	9
Tools to permanently engage stakeholders	10
Ensure continuous involvement	10
Monitor your performance engaging stakeholders	11
Final tips	11



IDENTIFICATION

2

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Axis	Axis 4: Enhancing Mediterranean governance		
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1. INTRODUCTION

The aim of this guide is to provide the PANORAMED partners with a tool to help them in the process of identifying and engaging stakeholders at national and regional level. Having in mind the Methodology elaborated by the Emilia Romagna Region, this document will offer additional information and tips.

This guide begins by stressing the importance of identifying and engaging stakeholders for the PANORAMED partners. It will be shown that, apart from a requirement expressed in the Application Form, these are strategic tasks which can bring significant added value to the work of PANORAMED partners. Then, some tools will be suggested to support the process of identifying stakeholders as indicated in the Methodology. Finally, several recommendations for effectively engaging the stakeholders identified will be offered to facilitate their continuous involvement in the activities of PANORAMED.

1.1 What is a stakeholder?

Definition

The Academia offers multiple definitions for the concept of a stakeholder. To cite just a few:

- “Any group or individual who can affect or is affected by the achievement of the organisation’s [PANORAMED’s] objectives” (Freeman 1984)¹
- “Individuals or groups who have an interest in the actions of an organisation [PANORAMED] and who have the ability to influence it”² (Savage et al. 1991:61)
- “Someone who potentially or really influences [the organization or project] and who is likely to be affected by [that organization or project’s] activities or processes or, more significantly, *perceives* that they will be affected” (Speller 2016:177)³

In essence, we will consider a stakeholder anyone who might be impacted by the work of PANORAMED and has the ability to influence it to some degree. Strictly speaking, all project partners are PANORAMED stakeholders, as they are affected by its development and have the capacity to influence it.

¹ Freeman, R. E.: 1984, *Strategic Management: A Stakeholder Approach* (Pitman, Boston).

² Savage, Grant & W Nix, Timothy & J Whitehead, Carlton & Blair, John. (1991). *Strategies for Assessing and Managing Organizational Stakeholders*. Academy of Management Perspectives, The. 5. 61-75. 10.2307/4165008.

³ Simon Speller (2016) *Identifying and engaging stakeholders*. Chapter from the book *The Innovation Tools Handbook*, edited by H. James Harrington & Frank Voehl.



Categories

The Application Form⁴ lists several specific categories of stakeholders relevant to PANORAMED

4

National/regional institutional policymakers

National/regional bodies/authorities

Private sector/business representatives

Representatives of academia and research sector

Representatives of civil society

Thematic and think tank networks

1.2 Why is it important for PANORAMED to identify and engage stakeholders?

PANORAMED's Application Form, as the main source of guidelines for the PANORAMED activities, indicates that identifying stakeholders is within the set of tasks of the **country coordinators**. Specifically,

Each country coordinator will closely coordinate with the WP3 leader in terms of identification of the national and regional stakeholder to target for communication purposes [...] This identification will be complementary with the identification the country coordinators have carried out in the framework of the Thematic WPs and will be based on a methodology and criteria [...]the concrete approach at national/regional level will be under the responsibility of the relevant country coordinator and adapted to the specificities of the country⁵

Nonetheless, identifying and engaging stakeholders is also in the interest of those PANORAMED partners working on the development of **strategic projects** to secure that the most relevant actors have access to the calls so they can participate and join one of the four strategic projects.

⁴ PANORAMED Application Form (Ref: 3186. Version 2. Approved) p.134.

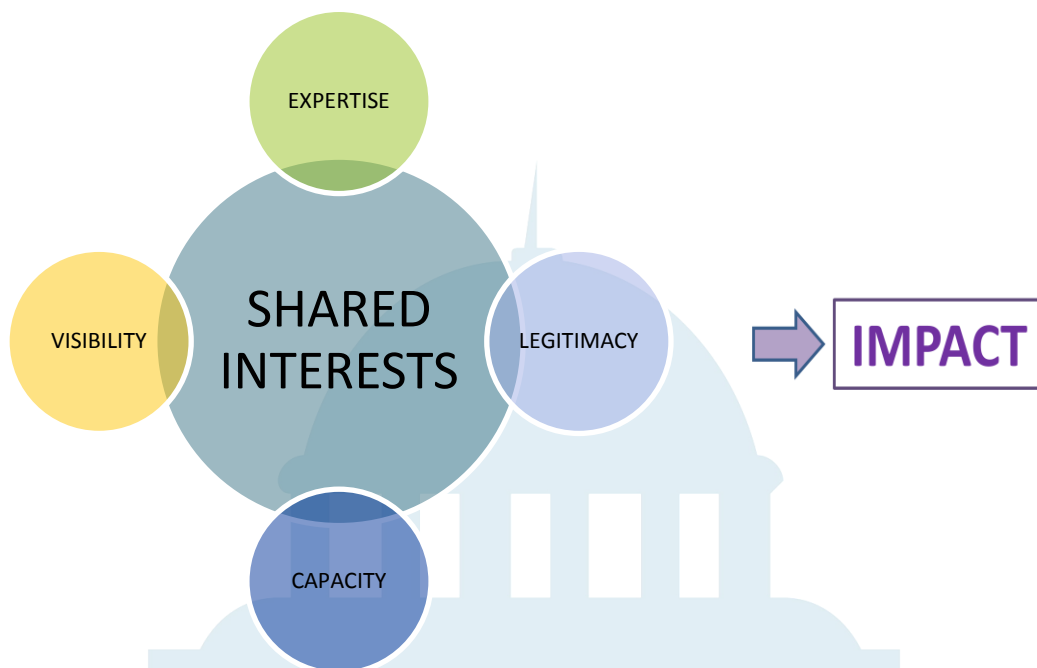
⁵ *Ibidem.*

What can stakeholders do for PANORAMED?

Stakeholders are essential for the development and success of PANORAMED in multiple ways:

- They represent a source of **expertise**: stakeholders such as academic institutions or think tanks can bring their perspectives to enrich the work of the partners, offer an improved access to relevant information, as well as increase the quality and depth of PANORAMED outputs.
- From the **communication** point of view, stakeholders can act as multipliers of PANORAMED messages, e.g. sharing PANORAMED tweets with their network of contacts, and thus increase visibility and recognition.
- Strong support from well-known and powerful stakeholders (such as institutional bodies at national level) improves decision-making, **legitimacy** and competitiveness of PANORAMED activities.
- Furthermore, PANORAMED could benefit from the **capacity** of some stakeholders and their ability to perform.

At the core of these assets are the **shared interests** between the PANORAMED partners and the stakeholders, which both are willing to promote. In sum, engaging a large number of relevant stakeholders in PANORAMED translates into higher **impact** of the platform activities.



In contrast, not engaging stakeholders results in a loss of assets, shareholder value and reputation, as well as a lost opportunity to obtain greater outreach and impact of the PANORAMED activities.

2. IDENTIFYING STAKEHOLDERS

2.1 The existing methodology

6

The *Methodology for the Identification of TWGs Members and Relevant Stakeholders* elaborated in October 2017 by the Emilia Romagna Region aims to support PANORAMED partners in “identifying the institutional and socio-economic actors to be involved, at different degree, in the project’s thematic work packages”. Such document includes a methodology for identifying stakeholders and a matrix to “list and describe” the ones identified.

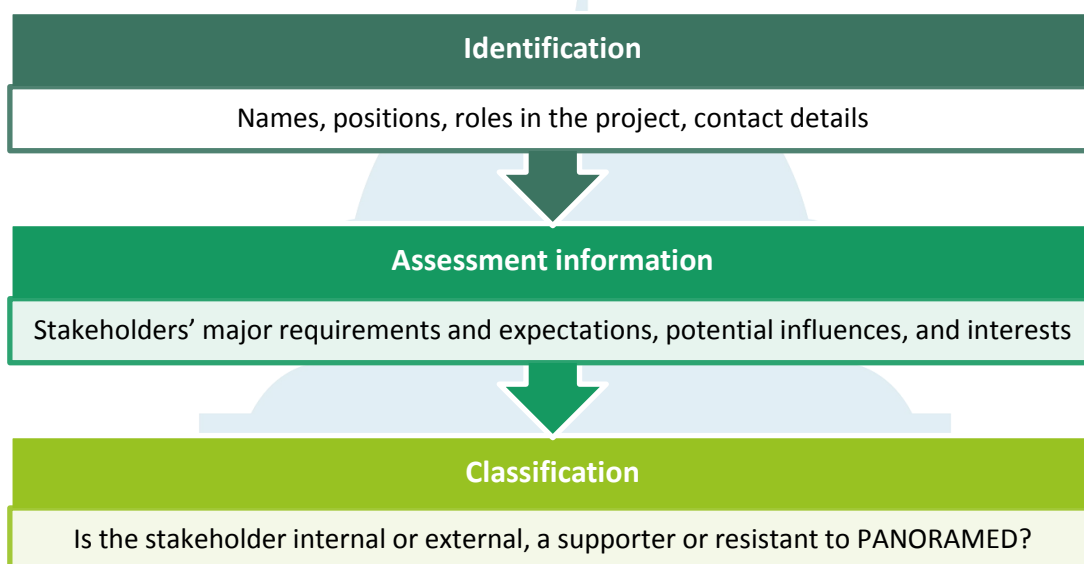
According to this methodology, the basic steps to identify stakeholders are: “desk analysis based on the main documents relevant to the fields of interest of PANORAMED”, produce “a first shortlist of the main potential stakeholders”, conduct an “individual profiling” (which would ideally be “done by directly interviewing them”).

This guide has taken this methodology as a starting point with a view to developing further tools to complement it. Such is the purpose of the following sub-sections.

2.2 Additional tools

First steps

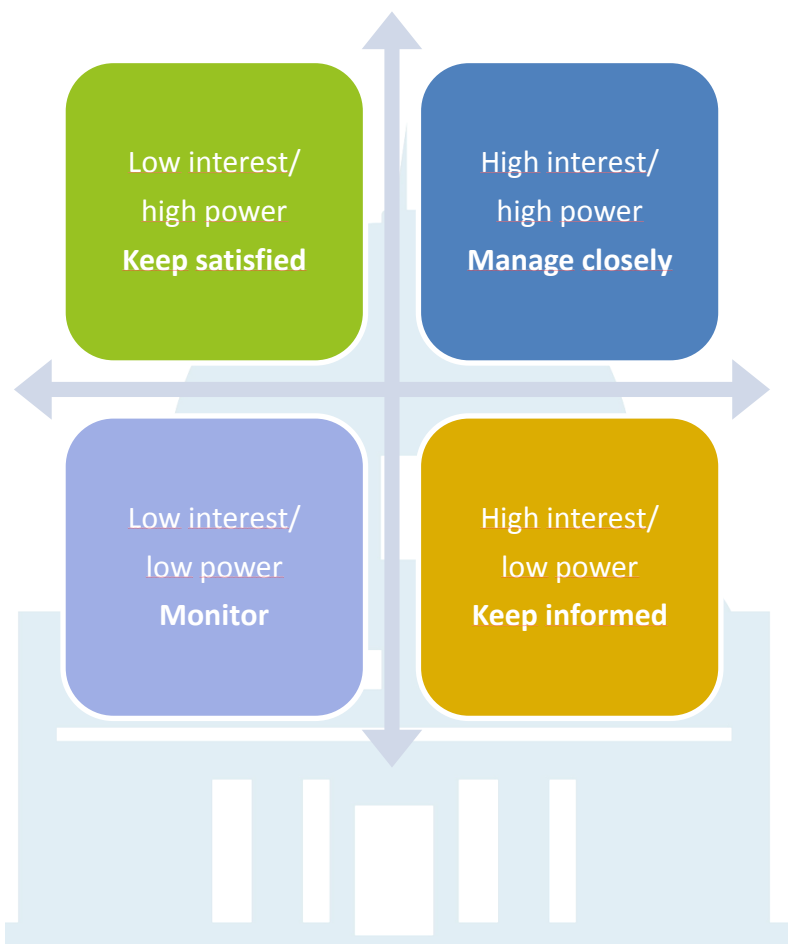
As part of the “desk analysis” recommended by the methodology, in complement with the “matrix”, these categories may be useful in the process of information gathering to filter and organise data on stakeholders.



Classification based on level of interest

Once relevant stakeholders have been identified and classified, decisions have to be made on how to engage them for PANORAMED. Since time and resources are limited, it is necessary to prioritise. In order to assist in this step, the following classification provides some guidance on how to interact with stakeholders based on two criteria: their interest in PANORAMED and their capacity (power) to influence it. Consequently, four categories emerge:

- Those who have little interest in PANORAMED and limited capacity to influence. This represents the category that deserves the least of our attention. Monitoring their activities and, possibly, inviting them to general public events could suffice.
- Those with low interest in PANORAMED but high power. What is needed in this case is to work to convince them about the convenience of supporting PANORAMED. Some ideas for arguments to develop to persuade them will shortly be enumerated.
- Those who have a strong interest in PANORAMED but limited capacity to influence. The recommended action for these stakeholders is to keep them informed about the platform's activities via newsletters and online posts and inviting them to public events.
- Those with high interest in PANORAMED and high power. This constitutes the category where most efforts should be invested. These stakeholders will have to be managed closely, frequently informed and invited to participate in PANORAMED activities.





3. ENGAGING STAKEHOLDERS

You cannot get large projects carried out without persuading large numbers of extremely difficult sorts of people to understand the importance of what is being done and to work together⁶ (Baker 1962:328)

8

Difficulties you may encounter trying to engage stakeholders

They have never heard of PANORAMED

Past relations or experiences causing resistance

Lack of trust due to context

People change

Unclear or too many channels to establish contact

How can you overcome those difficulties?

First and foremost, it is essential to stress what each stakeholder in particular can gain from supporting PANORAMED. Here are some tips to further assist you in this process:

Identify the reasons why they would support, or be against/ indifferent

Bring issues and key words that might ring a bell

Frame each issue from each stakeholder's point of view

Explain the cost of them not getting involved in PANORAMED

⁶ Baker (1962) *Study of large capital projects in the UK*

For those stakeholders who need convincing to support PANORAMED, here are some of the aspects that might be brought up to motivate an individual or an organisation:

Mutual commitment to the goals of PANORAMED

Personal stake in the project

Professional development for their team

Opportunity to earn additional visibility or income

Engagement plan

An engagement plan illustrating the different actions required for each type of stakeholders can be a helpful tool at this stage. Crucially, you should decide how you will communicate and who you want to collaborate with them. The following aspects need to be taken into account:

- Time available
- Budget
- Geographic location of stakeholders
- Extent to which stakeholders have existing relationships
- Stakeholders' availability to engage
- Extent to which stakeholders are familiar with PANORAMED

To facilitate this task, you might want to develop a **stakeholder communication plan** indicating the name of each stakeholder, their specific interests, the preferred communication vehicle (social media, newsletters, phone calls...) to reach them, frequency of contacts and any other comments. One example is provided below:

STAKEHOLDER COMMUNICATION PLAN					
Stakeholder	Power/Interest	Key interests & issues	Communication vehicle	Frequency	Comments

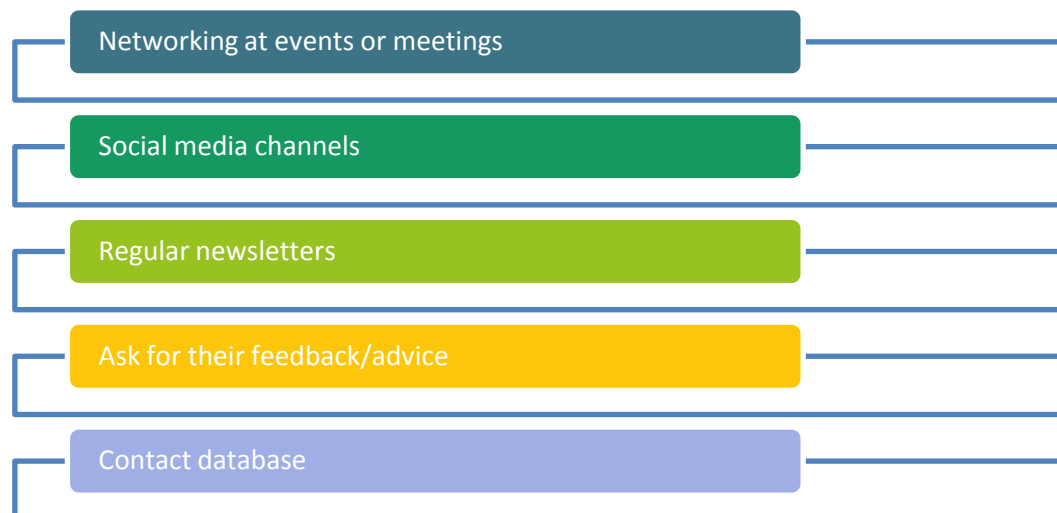


The PANORAMED Communication Plan for 2019 (available on the PANORAMED Google drive) includes a methodology for developing messages, as well as communication objectives and different audience groups. These could serve as examples for you to design your interaction strategy with stakeholders.

10

Equally at your disposal is a series of templates and promotional materials which you can easily adapt to the specificities of your audience in the framework of meetings or events with stakeholders. The PANORAMED Communications Team will be happy to help you in this regard.

Tools to permanently engage stakeholders



The key is to **build trust** in your interactions with stakeholders.

Ensure continuous involvement

Once you have identified and managed to get some engagement from a stakeholder, it is essential to ensure their continuous involvement in PANORAMED to a certain degree.

In this sense, as you monitor their work, you may celebrate and appreciate what they do. If you consider it adequate, invite them to contribute to your work.

Another suggestion is to try to anticipate their future needs so that you can prepare to address them; asking for their feedback through surveys can serve this purpose.

Last but not least, use language consciously in your interactions with stakeholders. For example, invite them to 'actively participate' in a meeting rather than to merely 'attend' it.

Monitor your performance engaging stakeholders

At the time of monitoring your performance when engaging stakeholders –an exercise which you are advised to conduct periodically, there are a few questions you should ask yourself:

- Are stakeholders getting the information they need/requested?
- Are we consulting them?
- Are their concerns addressed?
- Are we monitoring their activities?

Affirmative answers to these questions indicate an effective work of engaging stakeholders.

Final tips

Attend relevant events, network and follow-up	
Follow the identified stakeholders on social media	
Keep a database with names and contact details	
Invite them to the events you organise	
Share information about PANORAMED	
Address their concerns and manage their expectations	
Determine the level of importance of each stakeholder and prioritise	

