# How stakeholder engagement can work - methodological report on approaches used to engage stakeholders in the UNTANGLED project

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# Abstract

This report reflects on the UNTANGLED project's initiatives to engage stakeholders and identifies promising formats and some challenges. It explores the reasons why some formats may work better than others. Discussing UNTANGLED's various engagement and reflection formats, we conclude that both disciplinary and transdisciplinary subject-related 'communities' are prerequisites of projects and recipients of their results and outcomes. They also intermediate any scientific and societal 'impact' a project may have – but they perform these functions just because they are not built and sustained by the project. Hence, we argue that stated ambitions for a project to 'build' a community need to be taken with a grain of salt. A successful project fits into a stream of ongoing research and builds on existing disciplinary, transdisciplinary, and practice- and policy-related communities. Hence, the function of stakeholder engagement consists in connecting research insights and researchers with related research, policy and practice and their representatives and in sustaining such exchanges and networks. This applies especially to a project in an institutionalised academic field such as labour economics, where there are already more durable institutions and practices of generating, distributing, exchanging and translating knowledge. The conclusions provide some advice for considering disciplinary cultures and conventions in engaging stakeholders and introducing some open formats.

*Keywords:* stakeholder engagement

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# 1. Introduction

This report reflects upon the stakeholder engagement initiatives and practices in the UNTANGLED project which ran from February 2021 until January 2024, funded by the EU's Horizon 2020 programme. The project devoted an ambitious work package to stakeholder engagement in addition to its dissemination activities. The present report does not just describe the activities conducted in the project context for generic reporting purposes but reflects on the advantages and constraints of its output formats and outcomes and identifies successes as well as disappointments, traps and lessons learned. The aim is to provide some general insight into the practice of 'stakeholder engagement' of European research project that can feed into the efforts of further projects and other research organisations, clarifying what to expect and what to avoid.

UNTANGLED involved 14 partners originally, of which 11 are located in the EU. Seven of these are economic research institutes or university departments. The remaining four are more interdisciplinary, combining economic research with research embedded in other social sciences. From its output UNTANGLED is largely an economics project. This is worth mentioning because in implementing the WP we found that various disciplines and research areas have their specific modes and formats of communicating within and outside the discipline, with stakeholders and the wider public. For example, the more interdisciplinary institutes are also conducting applied research in job quality or industrial relations which often involves social partner organisations or companies directly.

Nevertheless, the project's subject matter, economies and labour markets are not just economic but also social fields in which multiple concerns, interests and values are negotiated. 'Stakeholder engagement' in this field is already institutionalised in various established and newly created commissions. Public employment services or social insurance bodies do not just service employers and jobseekers but have them represented in their governance structures. Social partnership, bi- and tripartite bodies and arenas involving employer or business organisations, trade unions and the state are common and may form and re-form to address new and emerging issues such as Industry4.0 or 5.0, the green transition or post-pandemic recovery and resilience. Academic and industry experts, especially economists, are also represented in these bodies. Or they may be consulted on policy issues or regularly report and present relevant research to policymakers.

## 2. Stakeholder engagement in UNTANGLED: The ambition

### 2.1. The terminology

Stakeholder engagement refers to the collaboration and exchange of individuals, groups, or organisations that influence or are influenced by activities of a (business) organisation (Kujala *et al.*, 2022), a policy institution on any level, or a non-profit. It addresses individual and collective actors that are not necessarily members of that organisation (its employees) but may be customers, beneficiaries, neighbours, or activists. Among business organisations, the terminology developed through the distinction of shareholders and stakeholders (Freeman, 1984). Shareholders as investors or owners exert particular influence and have a distinct interest in economic value creation, whereas stakeholders have wider and less defined interests (ranging from interests in good-quality employment, products or services to societal value to an interest in not being harmed by the organisation or institution in question). They may exert both formal and informal influence.

Stakeholder engagement is defined by Kujala *et al.* as follows:

> *'Stakeholder engagement refers to the aims, activities, and impacts of stakeholder relations in a moral, strategic, and/or pragmatic manner.'* (Kujala *et al.*, 2022, p. 1139).

This definition is worth a closer look. It puts the institution or organisation into the centre and assumes that this organisation does not simply react to stakeholders' influence but engages with them, gathers their insights and expectations, and responds to them (or tries to shape and manage expectations). This may happen in the different ways addressed by Kujala *et al.*: with regard to **values** ('moral') or to more or less institutionalised expectations of 'responsibility' (e.g. Corporate Social Responsibility, Responsible Research and Innovation), to the pursuit of the organisation's **interests and options** ('strategy') or **problem solving** or prevention of problems (pragmatism) - or any combination of these dimensions. Stakeholders are mostly understood as collective rather than individual actors. Engagement emphasises informal over formal interactions - which may also take place through interest representation (e.g. employees' or works councils' consultation and co-determination rights), evaluation procedures required by funding agencies or public bodies commissioning services, or advisory boards. Indeed, in many European research programmes, stakeholder engagement is an institutionalised expectation through the formal funding requirement of projects achieving societal impact (e.g. the framework programmes, H2020 and Horizon Europe).

In scientific research (as well as commercial or 'open' innovation) we can add the dimension of **knowledge**. Stakeholders here also provide knowledge from and about their respective contexts of policy, practice, interest representation, or science. This feeds into the research process and/or the uptake of research. Vice versa, stakeholders translate the knowledge generated by the research into their own respective contexts of action and provide insights into the ways these processes happen.

## 2.2.  Stakeholders in research

In social science, **empirical research** traditionally gathers the knowledge and insights of experts and generally people active in a particular field or affected by particular processes. However, conventionally this happens through carefully devised methodologies that aim to ensure that these insights are structured, matched to the research question, comparable, and representing the actors in the field in some way (not necessarily representative in a statistical sense). Research subjects thus have a circumscribed role in the research process – outside of decidedly participatory modes of research, such as action research, feminist research or research in development or social innovation contexts.

In **funded research** that receives its budgets from research programmes or direct commissions, funding agencies or agencies issuing tenders take more of a 'client' role and by definition influence, evaluate and eventually accept the research process and its outcomes – leaving more or less discretion to the research teams in shaping a project. Nevertheless, if things go well, they can support research by providing insight into practical and political contexts, contacts and opportunities for (mutual) reflection.

**Stakeholder engagement** is more open-ended and allows stakeholders more influence on research questions, data interpretation, conclusions and recommendations than a role as research subjects, but less decision-making power than a role in commissioning research. The respective roles are not always clearly cut but depend on the openness of the respective research and engagement processes. There is often a continuum between data provision and stakeholder engagement. For example, in industrial relations research it is not uncommon to conduct expert interviews with representatives of social partner organisations, then invite them to workshops to comment and add depth to aggregated findings and collaboratively draw conclusions.

## 2.3.  The ambition of UNTANGLED

UNTANGLED started out with a fairly ambitious plan for stakeholder engagement. It created a series of workshops, webinars and informal events in which academic colleagues, policymakers, representatives of international and European institutions, social partners and civil society were involved and that allowed to dive deeper into particular research questions than the mid-term and final conferences did. Here, target figures were largely met or exceeded. The variety of formats offered space for continuous exchange, and we also had some regular attendants. Beyond hosting and attending events, the project aimed to build a 'stakeholder community': firstly by fleshing out contact lists with survey data on people's institutional background, interests in specific subjects and formats, then by offering a 'Forum' (see Section 3.4) for continuous exchange. This notion of a 'community' that engaged *with the project* more or less continuously (beyond the reading of newsletters) turned out to be unrealistic although at the proposal stage it seemed to be a good idea. Originally, several ideas were borrowed from H2020 project 'SIC - Social Innovation Community'[1] which ran from 2016 to 2019 and as a networking project was dedicated to community building in the context of the ongoing institutionalisation of social innovation in the EU.

Indeed, UNTANGLED was a more academic project rooted in various existing 'communities' in economics, social sciences addressing work and employment, labour market actors and social partners. In this context, it neither needed nor was able to develop formats for a distinct 'project community'. To involve stakeholders, it effectively utilised the consortium partners' existing contacts, and these again are based on the reputation and social capital of both research institutions and individual researchers. 'Community building' thus involved sustaining networks and communities of research on the subjects of UNTANGLED and enhancing them by building new connections, and advancing scientific and policy- and practice-related knowledge in the process.

## 2.4.  The data

This paper is not a formal evaluation of UNTANGLED's stakeholder engagement. It is based on documentation of the activities (to be found on the project website and in the continuous reporting of the project), on ZSI researchers' participant observation in the activities as a work

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[1] In early 2024, that project's Facebook page has some 9,300 followers and still some current contributions https://www.facebook.com/groups/SocialInnovationEurope/ and its activities are continued by the European School of Social Innovation (essi-net.eu).

package leader during which notes were taken also on processes, on feedback gathered from project partners and participants in informal discussions, and through a dedicated debriefing and reflection meeting conducted on 7th December 2023 with the project's work package leaders (see Section 4).

## 3. The formats

Table 1 shows the formats UNTANGLED used for continuous stakeholder engagement. In addition, the project's mid-term and final conference were complemented by a panel discussion each that involved colleagues from the project consortium, other academic colleagues and representatives from OECD, DG Employment, Bertelsmann Foundation and the European University Foundation.

Table 1    Stakeholder events

| Item | No. of events | No. of participants per event | No. of contributions | Format | Other information |
|---|---|---|---|---|---|
| Workshops | 5 | 12-40 | 43 | In Person/ Hybrid | Mostly economists, neighbouring EU projects, international organisations, EU bodies, social partners, policymakers |
| Webinars | 4 | 20-52 | 13 | Online | |
| Online Forum | n. a. | 24 in all | 13 | Online | |
| Virtual Expert Cafés | 8 | 10-22 | 41 | Online | |

*Note*: For further information, see https://projectuntangled.eu/untangled-events/

## 3.1. Building a stakeholder community?

Indeed, UNTANGLED began with an ambitious effort at building a stakeholder community. A stakeholder information package was thoughtfully compiled and included a project outline including the project's planned activities, a letter of invitation, a link to a survey / contact list, and an informed consent form for the survey and recipients' permission to be contacted by the project. They were also encouraged to subscribe to the newsletter. This was proactively sent out to project partners asking them to distribute it to their existing contacts. Subsequently, responses were compiled, and a contact list was successfully established and shared.

This exercise yielded some 137 contacts who agreed to be contacted by the project. Distribution among stakeholders' organisations (see Figure 1) showed that 54% were researchers from either universities or research institutes, 12.4% were company employees (largely from banks, consultancies and tech or data service providers), followed by business or employer associations (8.8%), employees of national ministries (5.8%), trade unions and chambers of labour (from Austria and Luxembourg) (4.4%), labour market services (3.6%), European institutions (such as European Investment Bank, Eurofound and ELA) (3.6%) and regional development agencies (2.8%).

Figure 1   Distribution of registered stakeholders' organisations (February 2023)
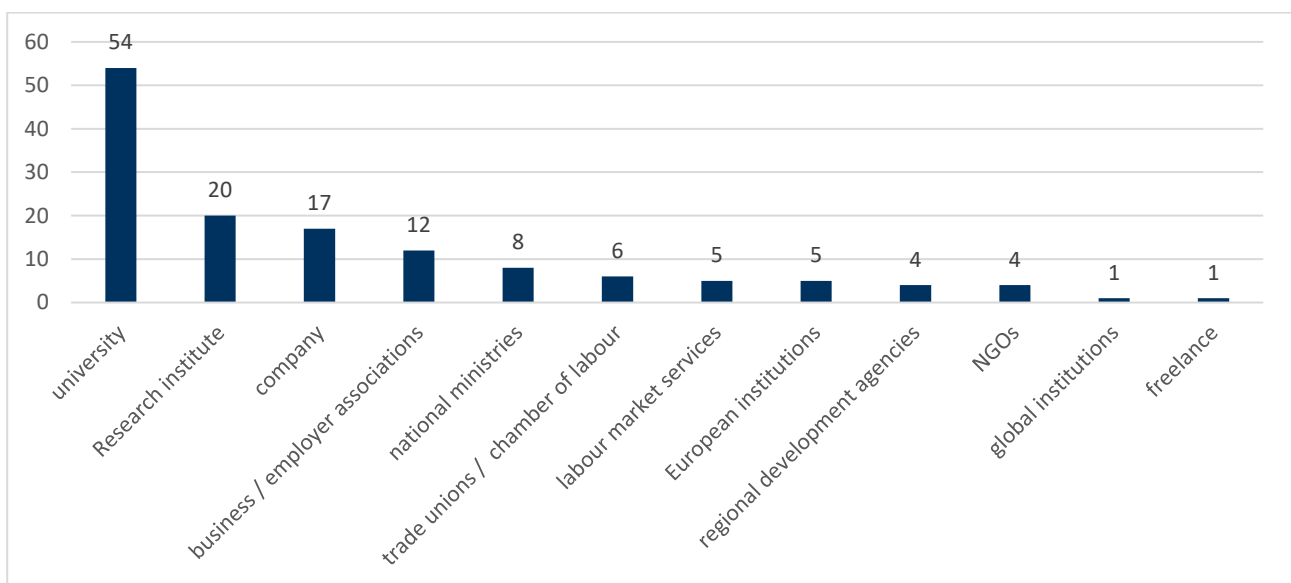


Indeed, it turned out that this list was not strictly necessary as workshops, webinars, conferences, virtual expert cafés were effectively organised in a more decentralised way. Event organisers primarily relied on their own contacts and colleagues' recommendations to find both presenters of complementary research and participants. The list was still utilised and expanded upon to disseminate project activities, extend open invitations, calls for papers etc. These were also effectively distributed through the project and partners' websites and social media. It turned out that these direct contacts and personal invitations were highly effective and potentially fostered greater commitment than being invited by 'a project'. Invitations were also thoughtfully extended to individuals who were not regular collaborators of partners, and some workshops successfully incorporated local stakeholders. This approach enabled a focused exploration of specific local contexts such as the labour market in Luxembourg or Austrian and Belgian social partners' uses of economic and social science research.

## 3.2. Workshops and webinars

**Workshops** were clearly the most popular format among both project consortium members and audiences. They were organised by work package leaders and addressed the main subjects of the project: global trends and their varieties, labour markets, inequalities and skills, with presentations of project results as well as complementary research. They were **chiefly attended by researchers** with a majority of economists. Some representatives of EU bodies, international organisations, national and European social partner organisations and labour market services also attended to contribute and to listen. Neighbouring European projects contributed as well. Formats were largely following **conventions of the discipline**, with presentations and discussion. Occasionally, some joint conclusions and takeaways were noted. Some workshops were in-person only, some were delivered in a hybrid format (see Section 5.3).

The work package leaders from ZSI, with an interest and experience in more open-ended and **participatory event formats** and co-created outputs would have liked more use of such modules to gain experience with participatory formats in a context of economics and social sciences, but workshop hosts preferred to give the workshops' limited time to more and wider research input. The authors consider this as a lesson learned on the discipline- and research-type-specific contexts and conventions of knowledge exchange.

**Webinars** as a distinct format have existed for a while, but with the experience of virtual coordination and collaboration during the COVID-19 pandemic have become more common. They allow for easy online access by both presenters and audiences, and thus can provide a handy way of delving deeper into one subject, combining research findings, addressing topical questions or methodological questions and so on. It is possible to reach audiences for whom travel is not an option for lack of budget, remote location, or lack of time. It appears that they also are attractive to junior researchers and graduate students. Webinars sit comfortably with conventional presentation-plus-discussion formats although other modes of working are possible, supported by digital breakout 'rooms' or visualised discussion ('whiteboards').

## 3.3. Addressing the subject directly: researchers and stakeholders on collaboration

The workshop organised by ZSI's team in September 2022 addressed the subject of (varieties of) stakeholder engagement and more generally, relations of research and practice, directly under the heading of 'Data and knowledge sources: how to put the evidence to work?' This covered applied research and research commissioned by public authorities, social partners or labour market services. Presentations first presented a series of **research methodologies** and

examples to explore their practical uses that covered social indicators, case studies and company surveys. The next cluster discussed established **formats for interaction between policy and research**. Indeed, apart from being involved in regular reporting on economic data to the government, research commissioned by public bodies or social partners, economic research institutes have their colloquia and also more informal gatherings with stakeholders (in one institute, known as 'fireside chats').

On the next day, representatives of social partners and labour market institutions reflected on public bodies' and social partners' experience in **commissioning dedicated research** and identifying relevant insights. Finally, a visualised discussion explored mutual expectations and needs of stakeholders and researchers, promising formats and processes (see Figure 2).

Constraints on such interactions lie in the specific logics of the research and policy systems (Bogner, 2021). **Specialisation** directs researchers and scientific journals towards 'depth' and details, while **limited data availability and timeliness** often hinder the development of solid and usable evidence at the time it is needed. On the policy side, while some research fills an immediate need (such as microsimulations of changes in taxes and benefits), other data and analyses translate into recommendations less easily. In addition, for public bodies commissioning research or showcasing indicators may take the place of actual policy efforts: **demonstrating awareness** of inequalities and presenting data, for example, is certainly easier than finding viable ways of redressing them.

Participants agreed that open-ended and **curiosity-driven research** remains indispensable to provide the grounds on which more targeted and application-oriented research can build. Research formats that directly address policy and practice, such as policy evaluations, deliver immediate results for policy and public purposes, but can also initiate further, more open-ended exchanges.

Then, the workshop discussed the translation of 'results' into usable knowledge. Presenting **'readable results'** requires dedicated formats and some know-how, which in many academic contexts remains unrecognised. While **media** provide enormous support for disseminating results, they also exert their own pressures for quick, simple figures that may obscure more subtle insights. **Informal contacts** and meetings (or even 'safe spaces') provide good opportunities to exchange views and mutually adjust expectations. Successful interactions require skilled people, dedicated spaces and times, and **mutual recognition** of the specifics of various research, policy and practice fields, as well as patience and persistence of researchers and also users of research.

Figure 2   Useful research outputs: UNTANGLED workshop September 21-22, 2022, Vienna
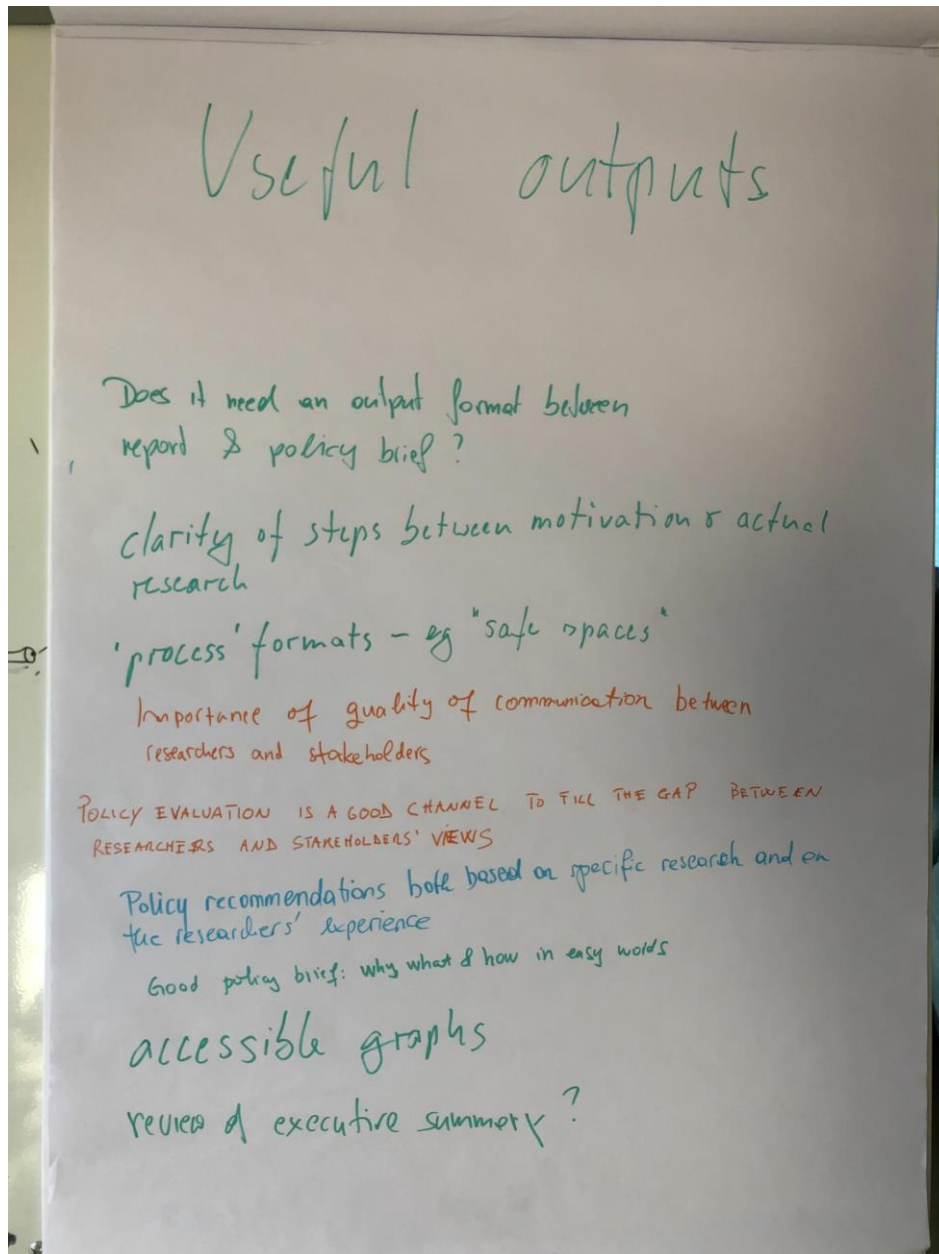


## 3.4.   Online Forum

UNTANGLED also embarked on an innovative path by launching a dedicated 'web forum' which was envisioned as a mixture of blog and news forum. The goal was for researchers to share **recent insights**, advertise publications, or put open questions up for discussion. Stakeholders from both research and other relevant practice fields were supposed to register and engage in such discussions or showcase their own activities and initiatives. One idea was to offer visual content such as interesting and accessible graphs to show some interesting and relevant facts

and figures – inspired by the impact of data visualisations such as the Lakner-Milanovic graph.[2] Despite the high aspirations, the forum experienced modest engagement: the Forum had 10 topics, 13 posts and some 24 registered users as of January 2024.

The most likely reason is that in between 2019 and 2021ff., not least through the COVID-19 pandemic and people's expanding use of social media, incumbent social media's network effects were strengthened in such a way that a moderated invitation-only project-specific format lost its chances to gain attention.[3] It could no longer compete with established social media of various types that are more or less close to scientific authorship, from science blogs to Reddit, LinkedIn, ResearchGate or X/Twitter, However, these social media (with the possible exception of ResearchGate) do not lend themselves easily to the identity of projects. Projects can and do have accounts and communicate, and so did UNTANGLED. Yet **to gain attention they must rely on persons' and institutions' accounts and followers**. People with a talent for social media, and organisations with professionals are the users that can invest into building significant follower bases and use best-suited formats.

In sum, it is clearly advisable to concentrate efforts on familiar and suitable platforms and social media, such as LinkedIn, ResearchGate or others and also use research institutions' channels. In addition, authors may be encouraged to contribute to existing subject-related blogs or websites.

## 3.5. Virtual Expert Cafés

Other than the commonly known types of events, the virtual expert café is a fairly new format, developed and piloted by Elke Dall and Ursula Holtgrewe (ZSI) in the context of the H2020 project 'SIC – Social Innovation Community' (Dall & Holtgrewe, 2019). It has proven to be a remarkably effective platform for informal yet substantive exchanges It can be described as a **low-threshold informal virtual forum for exchange**, in the form of self-selected presentations of one or two slides in presentation slots of five to seven minutes. Invitations are extended to everyone interested, through the website, social media, organisers' and project partners' contacts and communication channels. Hence, presenters give an 'elevator pitch' of their

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[2] https://en.wikipedia.org/wiki/The_Elephant_Curve, for a 2022 update see here: https://www.socialeurope.eu/global-income-inequality-time-to-revise-the-elephant, last visited on January 17th, 2024.

[3] The forum was modelled on the 'research forum' offered by the SIC project in 2019 and hosted by the European School of Social Innovation. It commissioned a series of blog posts on social innovation by the SIC consortium members which are archived here: https://www.essi-net.eu/?cat=42. However, it was not sustained beyond the project either.

research, advertising rather than presenting a publication, a project, or an activity that is relevant in the context. Just listening participation is also welcome. The invitations thus are open, presentations short, and discussion informal.[4] Slides contain further information (e.g. links to papers or projects, and contact data), are gathered by organisers and circulated among participants and - if everyone agrees - also put on the project's or institution's website. Typically, each presentation gets a round of quick questions for clarification, then inputs are discussed jointly.

In the case of UNTANGLED the umbrella subject was the impact of globalisation, digitisation, demographic change on the economy, work and employment. UNTANGLED held eight Virtual Expert Cafés, with 3-8 presentations each, attended by 10-22 participants mostly from academia but also from the European Investment Bank or the Austrian Chamber of Labour. Non-European colleagues such as project partners from South Africa and Columbia also presented their work and recruited further contributions from Latin America.[5]

In the authors' experience, the format with its **element of serendipity** (open invitations) works well to introduce work in progress and gain feedback on it, combine and relate qualitative and quantitative work, gain ideas and inspiration, connect related research with the project, advertise project events and recruit contributors, and not least to involve junior researchers and non-European researchers in the discussion. We recommend scheduling some presentations of project outputs in advance – but a **mixture of 'own' and 'other' presentations** makes for a livelier discussion. Facilitators are advised to think up a question or two to provide some feedback to presenters (if no one else steps in) and to start the plenary discussion. Group sizes in between 10 and 20 participants work well but more can be accommodated. The time slots per presentation and the duration of the event can of course be adapted (in the range of three to seven minutes). However, the record 8 presentations in 90 minutes make for a very compact event whereas reserving more than 90 minutes for the event will frighten potential participants off. The flexibility in presentation and event duration, along with thoughtful facilitation, ensures inclusivity and maximises participant engagement, making it a highly recommended format for future endeavours.

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[4] The first session on 18 November 2021 segued into a lively discussion of experiences and impacts of working from home in the pandemic that combined personal and scientific insights.
[5] See https://projectuntangled.eu/untangled-events/ for further information and presentations.

## 4. Feedback by project partners

Towards the end of the project's duration, the work package leaders distributed a small online survey to the UNTANGLED consortium and discussed findings in a virtual 'debriefing' meeting of work package leaders who had also organised events to draw joint conclusions and identify lessons learned. 17 researchers participated in the survey. It confirms that live virtual events and in-person events such as workshops and conferences were the most attended and the web forum was not used much. Conferences and in-person workshops were also most recommended - although virtual events had good attendance as well.

Figure 3   'Have the UNTANGLED activities led to the inclusion of external actors (persons not belonging to the project) in your network and has co-operation been established?' UNTANGLED partner survey
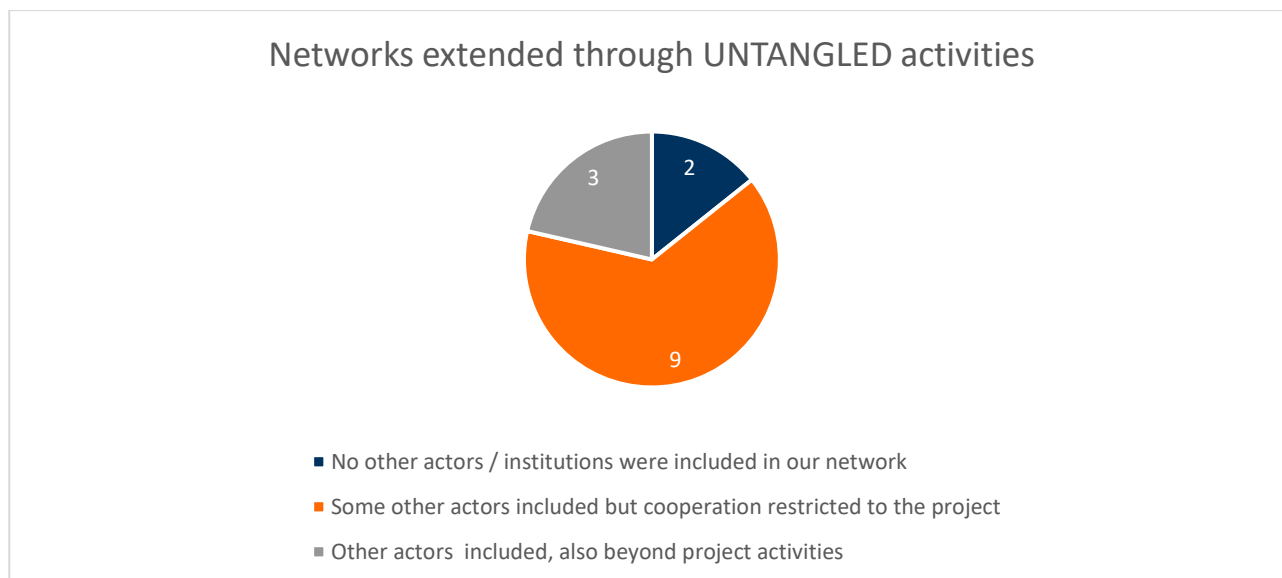


In the UNTANGLED project, the majority of project partners had included other stakeholders in their events but most reported in the survey that cooperation did not extend beyond the project context (Figure 3), and three respondents noted that they engaged with other actors beyond the project's activities. This shows that the project and its specific events worked as intended: as a vehicle to reach out to new contacts with whom further collaborations may or may not develop.

Figure 4 shows how consortium members perceived the added value of stakeholder engagement. The positive feedback refers predominantly to mutual exchange and a gained deeper perspective on the project's topics.

Ways to engage more external stakeholders outside of the discipline were also discussed. This requires consideration of stakeholders' needs and possible benefits. 'Networking' is an enjoyable activity for many people, but its inherent open-endedness collides with many stakeholders' tight schedules, competing demands and also frequently the need to legitimise activities within their own organisation. It should thus be clear for stakeholders what their engagement brings in terms of benefits, to which relevant and topical questions answers or insights may be expected. UNTANGLED researchers found that 'their' stakeholders often - like themselves - expect and prefer presentation and discussion of research results over brainstorming sessions or exploration of upcoming research questions – which validated the consortium's hesitant use of more participatory formats.

Figure 4   Consortium partners' perceived added value through stakeholder engagement

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|---|---|---|
| " Some visibility." | "A bit of better recognition on the topics we study, cooperations, network." | "The UNTANGLED network taught me new ideas, methodologies, and work organization which I can share with colleagues in my department." |
| "Valuable insights from ... UNTANGLED as well as from ... other partners were able to be incorporated into our other projects and work which were not related to UNTANGLED." | '"Getting to know other researchers and stakeholders and having a lively discussion with them." | "Some good feedback." |
| | "More insights about the impacts of globalisation of labour market (employment, wage and quality of work." | "Exchange." |

## 5.  Conclusions

### 5.1.  Communities around a project?

Initially, the UNTANGLED experience raises the question of the practicality of building a 'community' around a (three-year) research project since a project is by definition a temporary entity. Undoubtedly, it is essential for a project to promote and disseminate its activities, con-

tribute to research in the field and to the knowledge and expertise of stakeholders in the relevant practice contexts. It also needs to prove its value to funders, fulfil expectations and promises, and add to the respective research programme's legitimacy and reputation. The routines of designing and presenting projects, including logos, visual identities, websites etc. and borrowed from the branding of products and services, contribute to a sense of a project as an institutionalised entity, that - similar to an organisation - coordinates activities by setting a specific focus and timeline of relevance. This entails cutting off activities, concerns, and contexts that do not directly pertain to it. However, the project itself has a cutoff point when it ends. Thinking beyond the project is thus necessary (especially in project-funded research) but difficult.

However, from 'within' a project and more or less absorbed by it, researchers may not always remember that stakeholders and interested audiences generally are less interested in a particular project as such than in the content of its outcomes. Stakeholders enter and continue debates and knowledge exchanges by relating to this content or these outcomes. Arguably, **both disciplinary and transdisciplinary subject-related 'communities' are prerequisites of projects** and recipients of their results and outcomes. They also intermediate any scientific and societal 'impact' a project may have – but they perform these functions just because they are not built and sustained by the project. This applies especially to a project in an institutionalised academic field such as economics, where there are already more durable institutions and practices of generating, distributing, exchanging and translating knowledge. Fields such as social innovation, social inclusion, and possibly labour market policy are likely to be more 'projectified' in the sense that much of their activities, functions and services are funded and delivered through projects. It depends on the field whether projects (or some projects or sequences of projects) become sustainable points of reference for stakeholders at large.

## 5.2. Workflows and timing

Successfully engaging stakeholders also requires some consideration of timelines and workflows in the respective project and in its stakeholders' practices. Firstly, quite simply: Projects are discrete units with **limited duration**, and the **time it takes to build a reputation**, a follower base or a 'community' does not fit into three years, whereas existing communities can be connected and expanded. Secondly, there is the question of sustainability: after a project ends, it does not command much interest by itself, and then its outputs count. This is one more reason for researchers and institutions to hand over the contacts generated by a project to their general networks.

Presenting and **discussing 'work in progress'** to get more continuous stakeholder input into research appears also to be at odds with researchers' workflows. To some extent this is common research practice in the sequence of workshop or conference presentations that subsequently lead to peer-reviewed publications. It can also be done in dedicated project-specific formats such as advisory board meetings or internal meetings. However, in between researchers may find it difficult to find a time when a finding has been validated sufficiently to be shown and discussed and yet make sense as 'work in progress'. In addition, at the stage of finalising a report or paper, attending to quality control feedback, there may be no good time to include extra input.

## 5.3.   Online and/or in-person?

At the risk of stating the obvious, both have advantages: In-person formats are often preferred by participants but then they will have self-selected to invest the time and travel. They also offer more opportunities for open-ended discussion, brainstorming and conversation. Virtual attendance allows people to participate who could not have travelled for reasons of time, budget, or other obligations. Virtual events such as webinars can also be organised quickly and can react to current or emerging questions or topical issues of interest.

However, hybrid formats have to contend with a dual audience, and it is difficult to engage both on-site and off-site participants on even ground. This may be less of a problem when the format is strong on presentations and brief discussion like many academic workshops are. In UNTANGLED hosts of hybrid events provided more than one facilitator which ensured that one person could keep an eye on on-screen engagement and handle chat comments.

For more open-ended discussions and gathering of insights, it may work better to include on-site participants in a virtual format than vice versa. This can entail the use of visualised moderation through whiteboard tools such as miro, padlet, etc. Whiteboards can create a shared virtual space in which both online and on-site participants interact on even terms.

## 5.4.   Disciplinary and transdisciplinary cultures and conventions

One conclusion the authors at ZSI draw from the UNTANGLED stakeholder engagement practice is that such practices are quite deeply embedded in a particular discipline's or transdisciplinary culture and conventions. Economics, quantitative and qualitative social science methodologies have very specific and varying modes of defining, presenting and discussing 'results'. Economics research especially, building on established and recognised datasets and models, also have their own **institutionalised formats** of reporting to and advising governments and public bodies on the possible economic impacts of policy decisions.

**Participatory formats** are also embedded with specific research cultures or functions, for example supporting strategy development for public bodies, evaluations, or the various socio-technical approaches in Nordic or Continental European research programmes that aim to introduce technology, promote occupational health and safety, or improve the quality of work.

Notably, these cultures of research and stakeholder interactions are not hermetically sealed. Indeed, the distinction between basic or curiosity-driven (academic) research and the various genres of applied research is blurring, and the UNTANGLED project presented a challenging inter- and transdisciplinary learning experience in crossing these boundaries. **Transdisciplinary and mixed method work** and discussion is possible and brings new insights. Within UNTANGLED, sociologists, trained economists and other social scientists conducted case studies on the impacts of digitalisation, globalisation and demographic chains on companies and sectors that illustrated, validated, and partly challenged results grounded in economics (Holtgrewe, Lindorfer & Šalamon, 2024). Possibly, **practical and immediate collaboration** on data, events, papers or recommendations can support conceptual discussion and thus contribute to the development of joint research conclusions and clarify policy and practical implications of insights.

Explicitly **informal and open formats** such as the Virtual Expert Café appear suitable to a transdisciplinary and projectifying sphere of research as well and in UNTANGLED **complemented the more established formats** of workshops, webinars panel discussions and conferences. Such formats allow for advertising and 'window-shopping' of ongoing research and match the temporary character of projects and the continuum of academic and applied research genres. For in-person events, poster sessions (as in the workshop run by IBS) or other formats in a 'marketplace' style may combine informality and the interest in more and wider research input as well.

## 5.5.  Keeping formats clear

One important suggestion made by researchers in the reflection workshop was to **keep research and stakeholder engagement activities distinct**, for example by conducting research workshops and panel discussions separately. The idea is not to keep academic and more practice-oriented stakeholders separate but to keep formats and expectations of participants and audiences clear. This is arguably a safe and time-saving option.

Yet, we still argue that **some excursions outside disciplinary and institutional comfort zones** can add value and open spaces for unexpected insights. They do need to be introduced

incrementally though. Formats for stakeholder engagement need to take the disciplinary cultures and mutual expectations into account and cannot be dropped on unsuspecting audiences. Guided collaboration on actual data can provide inroads as well as structured modules to put results together and for example identify policy implications. Not least, putting the questions of research uses and transfer formats to researchers and users of research with various institutional backgrounds and exploring these very conventions (see Section 3.3) is helpful.

Finally, **reflexive conversations on stakeholder engagement formats and experiences** are useful throughout the course of a project as it certainly appears there is no 'one best way' across research cultures and disciplines, but an ongoing mutual learning process.

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