



BlueGreen
Governance

WP N°3

Task N° 3.1

D3.1: Case Study Protocol (including indicators and ex-ante evaluation)



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1. Introduction

The CS Protocol is a document aimed at supporting the smooth policy experimentations across cases by defining the common approach for the execution of policy dialogues. By defining clear objectives, rules, and task schedules, the Protocol seeks to enable the timely and efficient execution of activities throughout the life and extensions of BGG. The CS Protocol is needed to ensure that key insights from WP1 are properly considered, and that the analytical tools and methods developed in WP2 are exploited in the real-world cases.

The main aims of the Protocol are to:

- Ensure coordinated and consistent execution of activities in the BGG cases.
- Define common approaches for key activities in the cases.
- Define key concepts and support a shared understanding of these concepts.
- Define timelines for key elements of the policy experimentation for each case study.

This Protocol is designed to support policy experimentation across the eight BGG case studies (CSs)¹ for the four years of the project. It aims to address the complex issues related to the land-sea interface (LSI), particularly concerning the water-climate-biodiversity nexus. It serves as a guiding framework for CS leaders to ensure that policy dialogues are executed in a coordinated and consistent manner, fostering a cohesive approach to investigating science-, policy-, and social-based scenarios. Additionally, this document acts as a reference for all BGG partners in their ongoing collaborative efforts in research, innovation, and implementation as they progress through the innovative governance experimentation. Moreover, the Protocol aims to encourage meaningful internal and external peer-to-peer exchanges across stakeholders and CSs, facilitating the formulation of new governance schemes.

After this introductory chapter, the structure of this document develops in five further sections:

- Chapter 2 presents the WP3 eight-step general framework
- Chapter 3 clarifies the case selection in BGG and related aspects
- Chapter 4 presents the strategic foresight analysis
- Chapter 5 reports on the monitoring of policy experimentations in the BGG CS
- Chapter 6 presents the Internal Stakeholder Guide

¹ BGG CSs: Comunidad Valenciana (Spain), North Adriatic (Slovenia and Italy), The Isle of Wight (United Kingdom), Reunion (France), Western Scheldt (the Netherlands), Sea Scheldt (Belgium), Oslofjord (Norway), Canary Islands (Spain).



1.1. Roles and responsibilities under WP3

The policy dialogues require the contribution and efforts of WPs partners, CS leaders, and stakeholders of each CS (Table 1). In particular:

Table 1: Roles and responsibilities under WP3.

WP3 partners	Will coordinate the policy experimentations across the CSs. In detail they will support CS leads in the organization and management of the workshops, also providing scientific insights.
WP2 partners	Will provide two guidance on the implementation of the case studies: i) a tool for the development of a co-creative governance framework, ii) a tool for the development of strategic foresight.
WP5 partners	Will support CS leaders for an effective engagement of stakeholders.
CS leaders	Will keep the communications and relationships with stakeholders and will guide the workshops (accompanied by the help of WP3 partners).
Stakeholders	Will be the core of the workshops to bring a wide range of viewpoints and experiences, ensuring that different interests and concerns are represented. Their active involvement ensures that the process is inclusive, the discussions are enriched with diverse perspectives, and the outcomes are relevant, practical, and widely supported.

1.2. Interactions across WP1, WP2 and WP3

As anticipated in the Introduction, policy dialogues in the BGG CSs have to be the result of the synergies between WP2 and WP3 and has to consider the crucial insights from WP1. Particularly connected is Task 2.2, that develops a Strategic Foresight Framework through establishing the structure of multi-stakeholder deliberations around the question "What should be done?" for the CSs. This task will rely on a combination of different methods used in strategic foresight, including horizon scanning and megatrends analysis. In this regard, the detailed plan for the application of the Strategic Foresight Framework can be seen in Section 4 of preset document. Task 2.2. works with stakeholders for the "co-construction" of capacities to frame and assess cumulative impacts and opportunities across the biodiversity-water-climate nexus, and to translate them into collective action and management under the land-sea domain. Results from these activities will be shared with CSs, as a starting point for the data-driven policy dialogues (T3.2), to provide a better understanding of the ways that knowledge propositions (whatever their type and source) will facilitate scenario planning and visioning, and transformative actions at the various levels with stakeholders and policy makers and will enhance amplification of innovative schemes.

The Flow Chart reported in [Figure 1](#) explains in a visual way the details of the interactions between WP1, WP2 and WP3, the [BGG Dashboard](#) (including the environmental digital twin and the ePLANETe) in the



context of the BGG work plan. It also indicates when BGG will conduct three workshops (i.e., WORKSHOP 1, 2, and 3) in the eight CSs of the project for a total amount of 24 workshops.

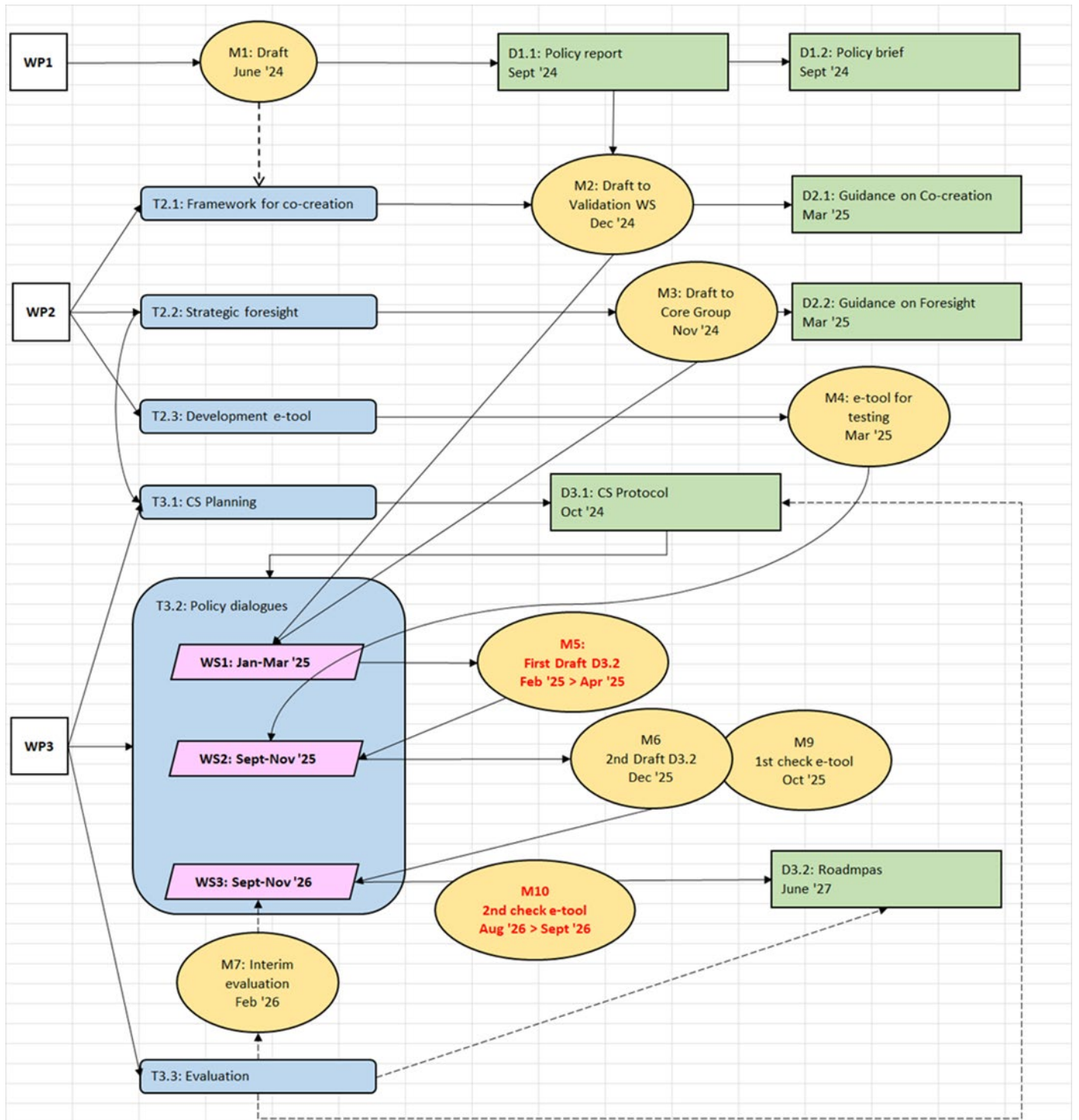


Figure 1: WP2-WP3 Workflow.

2. The WP3 general framework

The WP3 general framework inspired by the governance process is an eight-step approach, as shown in [Figure 2](#) below. During BGG we will go in depth to the first five steps.

The **first two steps** of the process are structuring phases, **aiming to identify the common problem and frame the process**. The connection between the CSs and the [BGG Dashboard](#) can be considered from the first step. The Dashboard itself does nothing *per se*, but it provides support to structure the process. Therefore, for the CSs, using the Dashboard will enable CS leaders to structure these first two steps, which will be integrated within the **ePLANETe** platform. This will help clarify the topics to be addressed and the processes for mobilizing and interacting with stakeholders.

The **third step** involves **risk and vulnerability assessment**, serving as a scoping appraisal to understand the actual status of the CSs considering the major vulnerabilities across the biodiversity-water-climate nexus in all CSs. This step focuses on understanding which are the most relevant issues, sectors, and actors within each region, as explained in Section 3.

The fourth and fifth steps in BGG will be analyzed through a Foresight Analysis methodology (Section 4), comprehensive of a series (i.e. 3) of workshops involving a broad range of actors in each CS. The **fourth step** is about the preparation (performed during workshop [1](#)) and designing (workshop [2](#) and [3](#)) of co-constructed and informed scenarios. In other words, it is about identifying the forms of mobilization of actors and forms of knowledge.

Important is to underline that this step is supported by the complementary approach proposed in the BGG Dashboard. On one side, the biogeophysical digital component will provide information through indicators and simulations, supporting the creation of scenarios. On the other hand, the ePLANETe platform focuses on the deliberative process of identifying the quality and relevance of the scientific indicators, arguments or actions that will be mobilized to compare the scenarios. The **fifth step** is comparing the scenarios, either through comparing scientific indicators developed within the biogeophysical digital component or using the Deliberation Matrix. This is a multi-actor and multi-criteria evaluation e-tool from a deliberative perspective. In this context, scenarios are compared based on the expression of judgments according to different actors and indicators, arguments, or actions that make it possible to express the acceptability (or not) of the scenarios envisaged.

In summary, the issues to be addressed will have been identified in step 2, during the process construction, and in step 3, through the analysis of risks and vulnerabilities. The process of co-creating scenarios is based on a complementary approach of informing stakeholders based on scientific knowledge and developing scenario narratives during participatory workshops. The ePLANETe Deliberation Matrix offers the opportunity to compare scenarios and mobilize scientific knowledge (notably from the biogeophysical digital component of the BGG Dashboard) to express judgments in terms of acceptability.



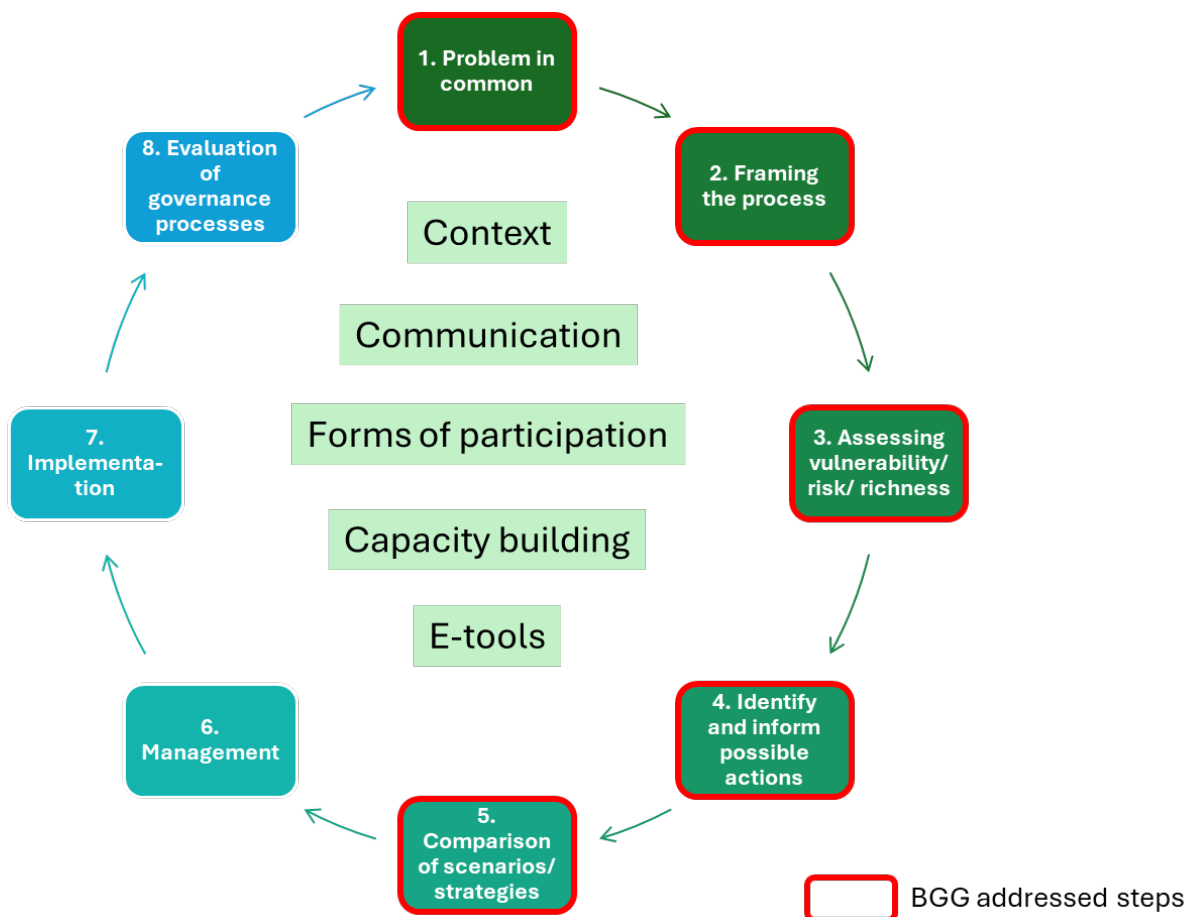


Figure 2: The eight steps of the BGG processes.

Steps 6 and 7 cover **management** (decisions and choices regarding actions) and **implementation** (implementation of actions identified around a set of objectives). The challenge of these two steps is linked to the appropriation of the results of the BGG project in management strategies and their possible implementation. This involves LSI based on different examples of the eight CS.

The eighth and final step consists of **evaluating the process**: What have we learned from this process? How have the participants appropriated the problem? What ideas have emerged from it? How can the results of the BGG project be mobilized in management or implementation? It is also about evaluating the contributions of the BGG project: what are the mistakes to avoid? what are the obstacles and enablers?

All the results of this process will be the subject of educational materials hosted on the ePLANETe platform.

What we have described above is the **general framework**. However, in BGG, we are involved **up to step 5** (Comparison of scenarios/sites/strategies). The subsequent steps (Management and Implementation) can be considered, but they are not included in the project's primary goal. The above framework being general will require to be applied differently depending on the CSs, which will necessarily feed into the three

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workshops described in the following sections (see Section 4). In each of these workshops, we will focus on developing certain aspects rather than others.



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3. Case Studies in BGG: selection, scope and focus

The third step of the WP3 framework, aimed at defining the CSs actual status, was performed by WP3 leaders during the first months of the project (January-February 2024). The choice of the eight BGG CSs reflects the rich diversity in the current and expected environmental challenges. This component has guided the case selection; indeed, the cases have been chosen to represent a diversity of environmental issues. The available information on the major issues across the biodiversity-water-climate nexus highlights how several regions in Europe will be affected by severe environmental challenges. The project addresses these challenges and focuses on the geographical areas where these challenges are expected to be more intense:

- **Storm surge, flooding, erosion and rising temperature and increase in pluvial flood and severe windstorms in closed seas** (e.g. Mediterranean Sea) and *northern open seas* (e.g. North Sea) threatening coastal settlements and tourist and agricultural sectors, and resulting in changes in agricultural productions and nutrient loadings, as well as unbalanced decline and migrations of some plant or bird species;
- **Loss of low-lying lands due to sea level rise and decreased water quality from salinisation in small and isolated islands** characterised by limited resources and geographic dispersion (e.g. Canary Islands and the Reunion), affecting sectors depending on coastal systems such as tourism, fisheries and agriculture.

Given the diversity of CSs, the policy experiments within WP3 will be customized for each case. In this regard, based on a preliminary questionnaire and interviews with CS leaders conducted in January-February 2024 by the WP3 team, the geographical scope of each case was defined according to the most critical hotspot areas (Table 2).

Table 2: Scope and focus of the Case Studies.

CASE STUDY	GEOGRAPHICAL SCOPE
CS1 Comunidad Valenciana	1) Six wetlands (Prat de Cabanes-Torreblanca, Albufera, Marjal Pego-Oliva, the Hondo, Santa Pola salt lakes and Mata and Torrevieja's lagoons)
CS2 North Adriatic	1) Natural and protected areas 2) (trans)port activities
CS3 The Solent	1) Isle of Wight (South-East coast, from St Helens to Ventnor)
CS4 Sea Scheldt (BE)	1) Sea Scheldt (consisting of 4 parts, between Gent and the Flemish-Dutch border) 2) River flood plain of the Sea Scheldt
CS5 Western Scheldt (NL)	1) Scheldt Estuary
CS6 Oslofjord	1) The Oslofjord 2) The drainage basin to the Oslofjord
CS7 Canary Islands	1) Gran Canaria 2) TBD if extend the study to other islands
CS8 Reunion	1) Reunion LSI



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Moreover, the selection of three most critical issues and sectors for each CS, based on the preferences of the CS leaders, has allowed for a more detailed definition on how climate change is impacting the 8 BGG CSs, and the sectors of the LSI that are affected. Table 3 reports all the most relevant issues, sectors, and actors that emerged.

Table 3: Case Studies Priorities.

CASE STUDY	ISSUES	SECTORS	ACTORS
CS1 Comunidad Valenciana	a) Sea Level Rise b) Coastal erosion c) Storm Surges	a) Agriculture b) Tourism and urban and infrastructure pressure c) Mining activity (salt and peat bogs)	a) Agricultural actors b) Business actors (port, housing, tourism) c) Mining actors
CS2 North Adriatic	a) Sea level rise b) Storm surges c) Coastal erosion	a) Tourism b) Shipping c) Natural & Protected areas management	a) Touristic management (sustainable vs impacting) b) Municipalities and communication with citizens and tourism c) Ports and shipping agencies
CS3 The Solent	a) Sea Level Rise b) Extreme rainfall and Flooding that can lead to Eutrophication c) Storms	a) Tourism b) Urban planning (housing and infrastructure) c) Protected areas management	a) Touristic management b) Municipalities and NGOs interested in communication with citizens and tourism
CS4 Sea Scheldt (BE)	a) Sea Level Rise b) Storm Surges c) Flooding	a) Agriculture b) Shipping c) Natural areas	a) Flemish government (administrations and agencies), including Agency for Nature and Forest and De Vlaamse Waterweg b) Antwerp-Bruges Port Authority c) Land owners (citizens, farmers, industry, ...) d) Provinces and municipalities e) Research institutes, e.g. INBO, WL f) Flemish-Dutch Scheldt Commission
CS5 Western Scheldt (NL)	a) Sea Level Rise b) Flooding c) Nature degradation	a) Water safety b) Shipping c) Nature conservation and nature restoration	a) Dutch central government (e.g., Rijkswaterstaat, Delta Committee), provinces, municipalities b) Dutch waterboards c) Vlaams-Nederlandse Scheldecmissie (VNSC) d) Antwerp-Bruges Port Authority e) NGOs f) Land owners g) Research institutes
CS6 Oslofjord	a) Degraded ecosystem b) Water quality, primarily eutrophication c) Pluvial flood	a) Sewage b) Urbanization (land-use) c) Fishery d) Agriculture	a) Governmental authorities (fishery, environment, agriculture, sewage) and secretariat of the Oslofjord Council b) Municipalities and counties c) Interest organizations, NGOs
CS7 Canary Islands	a) Extreme weather events b) Sea level rise c) Temperature increase	a) Urban planning (housing) b) Tourism c) Urban planning (Infrastructures)	a) Local Government (Cabildo) b) Regional Government
CS8 Reunion	a) Sea Level Rise b) Coastal erosion	a) Tourism b) Urban planning (privatization) c) Shark risk management	a) Touristic management b) Protected areas management c) Different actors representative of inequalities (native, rich investors, lower VS higher income population)

From these preferences, some clustering has been done to identify the most frequently chosen features (Tables 4 and 5, and Annex 2). From Table 4 related to issues clustering, it can be noted that sea level rise



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is the most frequently underlined climate hazard, impacting 7 out of 8 cases. This is followed by storm surges, mentioned in 4 cases, and coastal erosion in 3 cases. All the others, such as water quality and temperature increase, will be analyzed peculiarly in 1 or 2 cases.

Regarding the frequencies of sectors impacted by climate change, Table 5, it can be observed that urban planning and tourism are the most frequently affected sectors, in 6 and 5 cases respectively. This is followed by shipping and natural protected areas, in 3 and 4 cases. All other sectors are affected in only 2 or 1 case.

Table 4: Issues across CSs.

CS	Sea Level Rise	Coastal erosion	Storm Surges	Extreme rainfall	Atmospheric Storms	Flooding	Pluvial flood	Water quality	Degraded ecosystem	Extreme weather events	Temperature increase
CS1 Comunidad Valenciana	s	s	s								
CS2 North Adriatic	s	s	s								
CS3 The Solent	s			s	s						
CS4 Sea Scheldt (BE)	s		s	✓		s		✓	✓		
CS5 Western Scheldt (NL)	s		s			s			✓		
CS6 Oslofjord							s	s	s		
CS7 Canary Islands	s									s	s
CS8 Reunion	s	s									
TOT	7	3	4	2	1	2	1	1	3	1	1

Table 5: Sectors affected by climate change across CSs.

CS	Fisheries	Agriculture	Shipping	Tourism	Natural & Protected areas	Urban planning	Sewage	Flood risk management	Shark risk management	Mining activity
CS1 Comunidad Valenciana	s	s		s						s
CS2 North Adriatic			s	s	s					
CS3 The Solent				s	s	s				
CS4 Sea Scheldt (BE)		s	s		s	✓		✓		
CS5 Western Scheldt (NL)		s	s		✓	s		s		
CS6 Oslofjord	s					s	s			
CS7 Canary Islands				s		s				
CS8 Reunion				s		s			s	
TOT	2	3	3	5	4	6	1	2	1	1



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4. Strategic foresight analysis and workshops

The fourth and fifth steps of the WP3 framework, which involve identifying, informing possible actions, and comparing scenarios, will be carried out by WP3 leaders, CS leaders, and stakeholders through a foresight analysis over the next three years.

The development of strategic foresights aims at identifying possible actions (defined at institutional level or as actors proposals) to reduce and/to adapt to risks and vulnerabilities of the key components of the territory at the LSI. Strategic foresight analysis is a proactive approach to addressing complex challenges in environmental science, helping organizations anticipate and prepare for future challenges and opportunities. Under the influence of climate change, this methodology is crucial for navigating the complexities of composite ecosystems such as the LSI, which integrates terrestrial and marine environments and is recognized for its interconnectedness and interdependence. LSIs present unique climatic, ecological, and socio-economic challenges that require proactive and integrated approaches.

Four tools have been selected based on a narrative review of the most commonly used and interesting tools for exploring ecosystems in depth: 1) horizon scanning, 2) megatrend analysis, 3) scenario planning, and 4) backcasting.

4.1. Horizon scanning

Horizon scanning is a tool of Strategic Foresight Analysis that is aimed at exploring the future. By definition it is used to identify and aggregate early indications of change, or emerging signals that may potentially exert significant impacts when they develop (UNDP, 2022). As already mentioned in Section 3.2 of the Protocol, a first horizon scanning phase was conducted in January-February 2024 to cluster case studies on issues and sectors, in addition to this, a second horizon scanning phase will be performed with stakeholders during workshop 1 (see Section 4.2.1).

4.2. Megatrend Analysis

A megatrend analysis is used to analyze data (signals and events) to identify patterns that indicate the directions of change and understand connections (correlations and causations). In the case of BGG, we focus on climate change megatrends, to identify and understand large, overarching climate-related trends that are likely to have a significant impact on industries, economies, societies, and the environment over the medium and long term. These megatrends are typically characterized by their global scale, enduring impact, and the potential to reshape various aspects of the world. The analysis aims to provide insights that can help organizations anticipate future changes, adapt strategies, and make informed decisions. The megatrend analysis will be performed by WP3, and results will be shown during workshop [1](#) (see Section 4.2.1).



4.2.1 WORKSHOP 1

- **WORKSHOP:** WS1
- **Period:** January to March 2025
- **Online**
- **Overview of the WS1:**

In each CS, the BGG Team will present:

- Megatrend analysis
- Horizon scanning (including issues and indicators for the Cumulative Impact Assessment (CIA)).

The purpose is to define and refine the content presented through interactions with the Policy Experimentation Group for social validation.

- **Detailed actions of the WS1:**

- Presentation of the BGG project, the approach, and the projections (using the developed indicators within the Dashboard).
- Lead a discussion to understand how projections are used and appropriated by stakeholders to understand the impact of this development at the local level.
- An interpretation of the outputs of this discussion could be made in terms of issues, vulnerabilities.

4.3. Scenario Planning: the pathway for a compromise scenario

The creation of scenarios coincides with the description of plausible future states (scenario narratives) based on assumptions about key relationships between drivers of change and trends, to challenge assumptions and explore alternative ways. There are different methods (e.g., Organizational scenarios; Integrated scenarios; Transformative scenarios; Change progression scenarios method); during the BGG foresight analysis three scenarios will be presented and co-designed with stakeholders, i.e.: **science-based scenario**, **ideal (directive-based scenario)**, and **backcasting scenario**.

In order to design the science-based scenario a cumulative impact assessment (CIA) for each CS will be developed. Here is an in-depth look at what the CIA is.

★ Cumulative Impact Assessment (CIA)

CIA is a tool that can be used to predict potential futures based on historical data, and the models can be used to compare the effects of different components on the behavior of a system and make predictions about alternative actions (Pacinelli et al., 2008; Ednie et al., 2023). Cumulative effects are defined as “the incremental impact of an action when added to another past, present and reasonably foreseeable action” (Piet et al., 2017). CIA is based on quantification and mapping of cumulative impacts, making it a crucial tool



in water-climate-biodiversity nexus management. CIA involves the identification and assessment of direct and indirect interactions between multiple activities and receptors.

One of the first fundamental studies in this field, introducing a robust and systematic methodological framework is Halpern et al. (2008). This approach, combining spatial data on human pressures with the vulnerability of marine ecosystems, offered a comprehensive assessment, identifying marine ecosystems at greatest risk, to inform spatial planning and management decisions. Halpern's model, which integrates stressor intensity and ecosystem vulnerability, has been the basis for many subsequent applications, demonstrating robustness and adaptability in different contexts.

CIA, not only maps existing impacts but provides a comprehensive understanding, supporting more effective environmental management strategies, to develop adaptation and transformation strategies, to prioritize conservation efforts in the most critical areas and improve resource allocation, maximizing impact (Trew et al., 2019). In addition to its role in managing current impacts, the CIA is also crucial to anticipate and mitigate future pressures.

- **CIA within BGG:**

To assess the **cumulative impacts of pressures in the BGG CSs**, a methodology based on a modified version of the index proposed by Halpern (2008) will be adopted. The CIA methodology is divided into 3 fundamental phases to systematically assess the combined effects of multiple stressors on ecosystems: i) stressors and natural assets identification, ii) impact assessment, and iii) uncertainty management.

This approach integrates the results of megatrend analysis to provide a comprehensive picture of the interconnected and cumulative effects of risks on the regions. The methodology involves the calculation and aggregation of individual indicators and exposure data to quantify the overall impact on a specific geographic area. In Table 6 the roles of the BGG participants within the preparation and analysis of the CIA is reported.

In the context of LSI spatial planning, the integration of different **geospatial datasets** is crucial for the accurate mapping of pressures and the planning of interventions (Menegon et al., 2018), since different pressures are often present in different datasets with different spatial and temporal references. The tools and software used in the CIA are essential to transform raw data into useful analyses for local management. In the BGG methodology, Geographic Information Systems (GIS) and impact models will provide detailed spatial representations of cumulative impacts.

Moreover, the CIA methodology is implemented by extracting impact weights from the literature through Generative Pre-training Transformers (**GPTs**) models created on the OpenAI platform. These models are used to extract, organize data, and, when data were unavailable, generate missing values, ensuring a comprehensive assessment.

Finally, a multidisciplinary approach will be applied, allowing for a more comprehensive assessment integrating ecological, social, and economic perspectives, thus improving the relevance and applicability of CIA results (Giakoumi et al., 2015; Furlan et al., 2019) and providing the possibility to **identify potential areas** of trade-off, ensuring that the long-term sustainability of ecosystems is maintained (Weijerman et al., 2018).



Table 6: BGG roles in the CIA.

WP3 and WP2 partners	Will compute the CIA methodology for the eight BGG CSs and will provide the results to CS leaders and stakeholders through the BGG Dashboard during Workshop 2, Section 4.3.1.
CS leaders	Will support WP3 partners in the collection of the geospatial datasets (e.g., local datasets, natural assets, anthropic pressures) useful for the CIA.
Stakeholders	Will analyze the results of the CIA within Workshop 2, Section 4.3.1.

4.3.1 WORKSHOP 2

- **WORKSHOP:** WS2
- **Period:** September to November 2025
- **In presence**
- **Overview of the WS2:**

In each CS, the BGG Team will present:

- **Science-based scenarios** based on CIA.
- **Ideal scenarios** based on the policy target of the Green Deal and the policy framework in place. These scenarios will be built in collaboration with CS through desk research (in synergy with WP1 and WP2).

Deliberation will be about what should be done to reach the policy targets.

- **Detailed actions of the WS2:**
 - Following the identification of vulnerabilities and issues, identify scenarios.
 - We could start with a scenario, using the [BGG Dashboard](#), to change the values of the indicators of the sectors of activity to achieve the objectives of the water, marine environments, and biodiversity directives goals. Then, lead workshops so that stakeholders develop one scenario (co-construction).
- **NOTES:**
 - The component of the BGG Dashboard developed by UTARTU will be used during this workshop to create different scenarios.

4.3.2 WORKSHOP 3

- **WORKSHOP:** WS3
- **Period:** September to November 2026
- **Online/Presence** TBC
- **Overview of the WS3:**

In each CS, the BGG Team will build “what if” scenarios based on narratives.

- **Detailed actions of the WS3:**
 - **Co-creation of “What if” scenarios** at CS level.



- Comparison of scenarios in a multicriteria and multi-actor assessment analysis.
- We need preliminary work to identify possible indicators and actions at local, regional, national and supranational levels so that stakeholders can use them as part of the scenario assessment (in a backcasting perspective).

Workshop 3 offers a complementary approach to Workshops 1 and 2, which address the question of scenarios from a “What if?” perspective. In this 3rd workshop, we will apply three options according to the **state of advancement of the cases** in terms of already existing scenarios:

- For the **less advanced CS**, WS3 could help in defining the problem in common and the types of actions that could be developed in order to think about the future and accompany to develop scenarios narratives.
- For the **moderately advanced CS**, the work could be the design of scenarios mobilizing narratives and outputs of the Dashboard. The use of the Deliberation Matrix will be based on multi-actors and multicriteria assessment using scientific indicators and arguments (of non-scientific actors). The assessment is based on the acceptability of the scenario.
- For the **more advanced CS** (scenarios already developed). The strategic foresight approach will be based on the developing and assessment of actions in a backcasting perspective. The use of the Deliberation Matrix will be based on multi-actors and multicriteria assessment using scientific indicators and actions (defined by institutions). The assessment is based not only on the acceptability of the scenario but also to identify the opportunities and difficulties to implement co-creative governance of the LSI.

We will also rely on quality scientific knowledge from the BGG Dashboard, and possibly from the EDITO (Digital Twin of the Ocean) and the DESTINE (Digital Twin of the Earth). The scientific knowledge will be completed by arguments from stakeholders expressed during workshops. The diversity of knowledge will be mobilised to inform strategic scenarios and in the assessment process of the strategic scenario. Actors could mobilise the diversity of knowledge to express their judgment about the acceptability of scenarios and the challenges of co-creative governance issues.

Finally, during Workshop 3, we will use the Deliberation Matrix, a multi-actor and multi-criteria evaluation to compare scenarios from a deliberative perspective. Comparing the results of Workshop 3 at the CS level will make it possible to draw lessons on the contributions and limits of the different complementary prospective approaches.

● **NOTES:**

The ePLANETe component of the BGG Dashboard will be extensively used to build:

- The KerBabel Deliberation Matrix aims at expressing a generic problem of social choice within an operational framework of multi-stakeholder multi-criteria deliberation support. The evaluation problem is structured along three dimensions, the axes of the Deliberation Matrix. These portray:



1. The OBJECTS of comparative evaluation attention (which can be, depending on the problem, scenarios, alternative sites, investment strategies, public policy options, and so on).
2. The spectrum of the PERFORMANCE GOALS AND CHALLENGES.
3. The different ACTORS OR STAKEHOLDERS involved in, or potentially affected by the problem.

– The KerBabel **Deliberation Matrix** invites the declaration by (or on behalf of) each category of stakeholders, of judgements about each of the objects, options or scenarios under evaluation, with reference to each consideration in the spectrum of governance or quality-performance issues.

– Training on the Deliberation Matrix can be planned for Spring 2026.

Insight: Case Studies and BGG Dashboard

This insight presents the interaction between CS and the e-governance tool, named BGG Dashboard, an e-governance tool intended to support and strengthen the policy experimentation and the governance processes in general. The originality of this approach lies in the challenges of mobilizing an e-governance tool in the governance processes of the LSI. Within the framework of the BGG project, the BGG Dashboard can be considered a double digital twin. It is composed as follows (see [Figure 3](#) below):

- A **biogeophysical tool** which will provide a representation of the real world by integrating data from various sources and,
- A **deliberation tool** providing a digital twin for governance processes (ePLANETe digital platform).

The two components of the BGG Dashboard are complementary as the definition of vulnerability differs between those two components. The geophysical digital twin, based on databases, allows for assessing impacts and vulnerabilities. In contrast, ePLANETe evaluates risks and vulnerability from the stakeholders' point of view in a deliberative perspective.

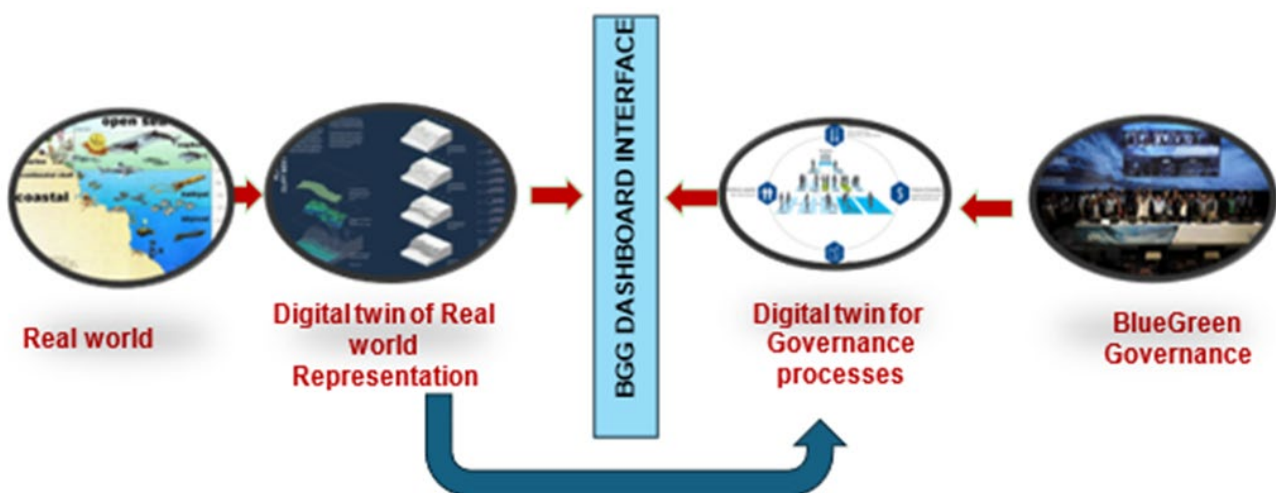


Figure 3: Visual representation of the BGG Dashboard as a Double Digital Twin.

How the BGG Dashboard will be used in the BGG CSs, and at which steps it will be used will need to be decided on a case-by-case basis to fit the local context best, the progress (e.g. CSs with identified scenarios or SCs without scenarios) and the needs of each CS. Furthermore, one or both components of the BGG Dashboard could be relevant depending on the steps we are considering.

5. Monitoring and evaluating policy experimentations

The monitoring and evaluation of policy experimentation is covered by *Task 3.3: Evaluation and monitoring (OUNL)*. This task aims to monitor and evaluate the policy experiments and their impact on institutional change. For that purpose, Task 3.3. will develop **a set of key indicators** based on the insights developed in WP1 and stakeholder views that can be used for monitoring and evaluation. Information about these key indicators will be collected for each experimentation case at three different moments during the project, namely before the start of the policy experiment (ex-ante), halfway the policy dialogues (interim), and at the end of these dialogues (ex post evaluation).

The key indicators will address the different dimensions that characterize the role of the policy experiments in this project, focusing on integrated land-sea management and planning, the use of scientific knowledge, participatory practices and stakeholder involvement, the development and use of strategic foresight, the use of e-governance tools. Key stakeholders will be closely involved in the collection and interpretation of the information.

Task 3.3 will furthermore specifically evaluate the performance of the co-creation governance model and the BGG Dashboard developed in WP2. This part of the evaluation will focus on clarity and useability of the co-creation governance model and e-governance tools from the perspective of the users, as well as on their role in and impact on the policy dialogues.

The monitoring and evaluation approach serves different purposes:

- Stimulate discussion and reflection in the cases and contribute to the development of the roadmaps;
- Allow the development of policy recommendations based on the lessons drawn from the cases and the policy dialogues;
- Provide information and evidence for scientific articles (e.g. on land-sea interactions and strategic foresight);
- Evaluate and improve BGG Dashboard and the general e-governance tool(s).

For these reasons the approach will combine:

- **Survey about key aspects** among case study leaders.
- **Additional set of questions** focusing on particular dimensions and aspects that help to better understand the case and contribute to the discussions with stakeholders.
- **Survey among stakeholders to monitor learning** and evaluate the use of the Dashboard.

The overall aim of BGG is to instigate change in coastal governance. It therefore focuses on five dimensions that are important for addressing the sustainability issues at hand, in particular the challenges of climate change.

- Integrated land-sea management and planning (see Section 5.1)
- The use of scientific knowledge (see Section 5.2)
- Participatory practices and stakeholder involvement (see Section 5.3)
- The development and use of strategic foresight (see Section 5.4)
- The use of e-governance tools (see Section 5.5)



For the monitoring and evaluation, we will focus on the key challenges in these domains and the way in which these challenges can be addressed. More specifically we will analyse and evaluate changes in governance and institutions, that is change in the norms and rules that govern actions and interaction. Changes in governance can be large or small. These changes can concern actions within the specific dimensions, but also relate to changes in the way the different dimensions are interrelated. The results from monitoring and evaluation will be an important input for the development of recommendation at the final part of the BGG project. Monitoring and evaluation should not only offer insights about institutional change, but also in the process by which actors try to change institutions, and in the factors that help to explain successes and failed attempts. This implies that monitoring and evaluation are not focused on making judgements about the processes of institutional change per se, but on the lessons that can be drawn from monitoring and evaluating these processes. The monitoring and evaluation approach should furthermore be relevant for the stakeholders involved in the BGG project and help them in better understanding the context they are working in and in developing **new ideas and insights**, making improvement and in putting governance on a more sustainable path.

Learning requires a reflexive form of evaluation that closely involves relevant actors in the process of evaluation. This involvement is needed to better understand actors' perspectives and the ways in which they make sense of the processes of change. Involvement is also needed because it facilitates learning among actors, and preferably also social learning.

For understanding and evaluating the process of institutional change a few aspects are relevant. First of all, it is important to take into account that institutional change is a gradual process in which changes are not always easily observed. Analysing this process and its outcomes comes with some challenges:

- Outcomes are **not always easy to identify** and observe, sometimes institutional changes only become visible after a while.
- Certain **institutional changes require (lengthy) procedures** and might take a long time (e.g. development and adoption of a policy or changes in legislation).
- Institutional change can **continue after a policy** is adopted, as people in implementation processes interpret that policy and its relevance in different ways, therewith influencing the meaning and potential impact of that policy.
- **Not all attempts** to change institutions are successful.
- Institutional change might depend on informal institutions which are generally much more stable and **difficult to change**.
- Institutional stability and maintenance are also important. Effective governance also **requires stability**, e.g. to ensure democratic procedures.

These insights about institutional change are taken into account in the design of the monitoring and evaluation approach and while making sense of the information that is gathered as part of the monitoring and evaluation approach. This approach furthermore takes into account processual factors as well as different types of



outcomes. An interpretative approach that involves actors and stakeholders (first order observations) is preferred because of the focus on (social) learning and a reflexive evaluation, but it can be complemented with additional observations and assessment made by the researcher or other outsiders (second order observations).

Based on the issues mentioned above we propose an approach that combines **summaries of dialogues** and **interviews** with a **survey** among stakeholders and case study leaders. The surveys are used to assess a limited number of key aspects and the user experiences with the dashboard. The more extensive summary of the dialogues and interviews that will be made after each workshop should reflect the different views, the current state of governance, particularly in relation to the five different dimensions, and ideas about how to improve governance. The list of questions will be based on the findings of WP1 and can be tailored to the particularities of each case. Together the summaries should enable a more in-depth reflection of the process and its outcomes and offer the insights needed for formulation policy recommendations (Figure 4).

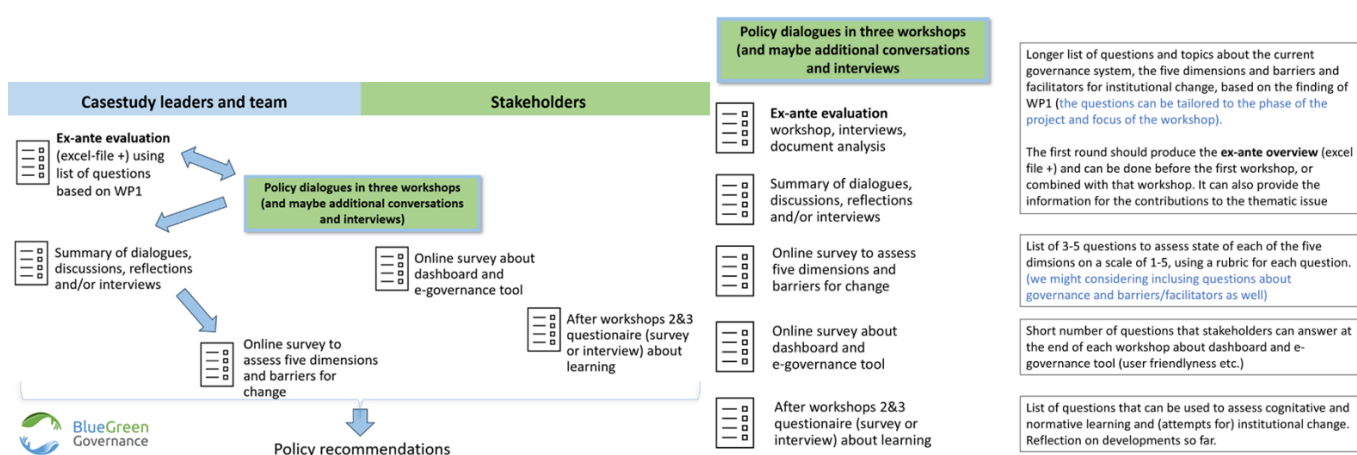


Figure 4: Ex-Ante Evaluation Framework for Stakeholders and CS leaders: Insights from Policy Dialogues and Workshops.

In the following sections, the main challenges within each of the five areas are summarized.

5.1. Integrated Land-Sea Management and Planning

<p>Coordination Across Land and Sea Jurisdictions</p>	<p>Evaluate the level of coordination between land and marine management agencies, as well as the legislative and regulatory structures linking land-based and marine-based planning. Coordinating the efforts of diverse sectors and stakeholders is necessary to tackle the challenging task of integrating coastal and marine management across jurisdictions (Portman, 2011). Evaluating the effectiveness of integration efforts involves assessing the “alignment of legal frameworks, institutional structures, and collaborative capacities” (Ansong et al., 2021).</p>
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<i>Sustainable Resource Use</i>	Evaluate whether land and sea resource use is managed in a sustainable manner, taking into account the biodiversity-water-climate nexus. Sustainable resource management in Europe requires an ecosystem-based approach that considers biodiversity, ecosystem services, and climate resilience (Cooper et al., 2012).
<i>Stakeholder Inclusion</i>	Assess the extent to which local communities, industry stakeholders, and environmental organizations are involved in planning processes, particularly in balancing competing land and sea uses.
<i>Cross-sector Collaboration</i>	Evaluate the effectiveness of collaboration among sectors (like fisheries, tourism, agriculture, and shipping etc.) ensuring that management plans reduce conflicts and enhance synergies.

5.2. The Use of Scientific Knowledge

<i>Accessibility of Scientific Data</i>	Evaluate the ease of access to scientific data and findings (making data findable, accessible, interoperable, and reusable (Molina Jack et al., 2023)) for decision-makers, stakeholders, and the general public. This includes the data's accessibility via open-access platforms and its format, which should be easy to comprehend and use.
<i>Integration of Science into Policy</i>	Assess how well governance and policy-making processes incorporate scientific knowledge. This entails determining if current scientific findings (i.e., peer-reviewed research) serve as the foundation for policy decisions and whether there is a direct correlation between regulatory actions and scientific advice. In the European context, there is growing recognition of the need for a new relationship between science and governance, emphasizing greater openness, stakeholder participation, and improved management of knowledge to address the complexities and uncertainties in policy decisions (Funtowicz et al., 2000). It is also important to understand whether the scientific knowledge being used is relevant to the specific socio-ecological context of the coastal areas in question.
<i>Use of Traditional and Local Knowledge</i>	Evaluate how traditional ecological knowledge (TEK) and local knowledge are integrated with scientific research, ensuring that indigenous and local practices are respected and considered in decision-making. The integration of TEK and local knowledge with scientific research is gaining recognition as essential in coastal and marine management. TEK offers valuable environmental insights, particularly in marine ecosystems where scientific data may be scarce. For this integration to be effective, it is vital to build trust, actively involve communities, and align research objectives and outcomes with shared interests (Thornton & Scheer, 2012).
<i>Communication of Scientific Findings</i>	Evaluate which communication methods work best for informing non-science audiences about scientific discoveries. This involves determining whether scientific findings are disseminated in a way that promotes informed involvement and decision-making through workshops, reports, dashboards, or other formats.



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<i>Capacity Building and Training</i>	Assess how much training and assistance are provided to stakeholders and governance actors to improve their ability to make decisions by utilizing scientific tools, data, and techniques.
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5.3. Participatory Practices and Stakeholder Involvement

<i>Inclusiveness of Stakeholder Representation</i>	Examine the degree to which a variety of stakeholders are involved in the governance process, including local communities, companies, NGOs, scientists, and government agencies. Examining the level of engagement of underrepresented or marginalized groups is part of this.
<i>Transparency and Communication</i>	Evaluate how well-defined and transparent the channels of communication are between decision-makers and stakeholders. This involves whether or not critical decisions, procedures, and results are communicated to stakeholders in a transparent manner.
<i>Social Learning</i>	Analyze the degree to which participatory methods promote social learning, in which participants exchange knowledge and gain a deeper comprehension of one another's viewpoints and values in order to work together to find answers.
<i>Capacity Building and Empowerment</i>	Evaluate the efforts made to increase stakeholders' ability to participate actively in governance processes. This involves giving them the tools, knowledge, and training they need to engage in the process successfully. Transparency, communication, and incorporating stakeholder input into decision-making processes are all necessary for meaningful involvement (Yates, 2018).

5.4. The Development and Use of Strategic Foresight

<i>Incorporation of Long-Term Perspectives</i>	Examine if long-term trends and uncertainties are taken into account in governance strategies and policies, especially those that pertain to climate change, water resource management, biodiversity degradation, and socioeconomic changes. Are scenarios for the future being created and discussed?
<i>Adaptability and Flexibility</i>	Analyze if the governance structure can adjust to evolving circumstances, or unanticipated challenges. Governance institutions that are flexible enough to adapt to changing environmental, social, and economic conditions should be promoted by strategic foresight. At the same time, adaptability should not undermine the stability of governance and attempt to work towards long-term goals.



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<i>Alignment of Short- and Long-Term Sustainability Goals</i>	Determine whether the short-term goals and the long-term goals are coherently aligned. This entails making certain that present choices support sustainability goals and a resilient governance framework rather than jeopardize long-term sustainability objectives.
<i>Capacity Building for Foresight</i>	Determine whether institutions and actors possess the knowledge and resources needed to participate in strategic foresight activities. This covers education, availability of foresight tools, and institutional backing for long-term planning.
<i>Influence on Policy and Decision-Making</i>	Examine the ways in which the application of strategic foresight directly impacts the creation and execution of policy. How well does foresight transfer into actual governance acts or policy changes?

5.5. The Use of E-Governance Tools

<i>Accessibility and Inclusiveness</i>	Assess the degree to which all stakeholders, particularly disadvantaged groups, have access to e-governance technologies. This entails evaluating the tools' usability, making them available in a variety of languages, and guaranteeing that all users possess the digital literacy required to interact with them.
<i>Integration with Traditional Governance Processes</i>	Analyze the integration of e-governance solutions with the current governance structures. This involves determining how these tools fit in with current procedures and practices and whether they improve or supplement conventional governance techniques.
<i>Facilitation of Communication and Collaboration</i>	Assess the degree to which e-governance tools facilitate interaction and cooperation between various stakeholders. This involves evaluating how well the tools facilitate information sharing and coordination.
<i>Effectiveness in Decision-Making Process</i>	Evaluate how e-governance tools affect the coastal governance decision-making. This involves assessing how well these instruments promote evidence-based policy development, aid in well-informed decision-making, and produce more effective governance results.

6. Internal Stakeholder Guide

This guide provides useful information to CS leaders in their process of engaging with the Policy Experimentation Group. The Policy Experimentation Group gathers all the key stakeholders that are involved in the policy experimentation work coordinated as part of the WP3 work: policy/decision-makers; environmental NGOs; business organizations, and civil society associations (Grant Agreement, section 1.2.3).

We used the BGG project's initial kick-off in April 2024 to harness the key elements that the case study leaders would like to be covered in this guide (See [Figure 1 in Annex 6](#)).

Key messages are given for each of the topics and links to additional material is provided for further exploration.

Working under a co-creation approach

Engaging in coherent and credible co-creation is key to the overall project (see *Annex 6: Box 1: Co-creation, co-design and collaborative governance as defined in the Blue Green Governance's Grant Agreement*). Co-creation is defined as collaborating with stakeholders in a way that the design process and outcomes from it are truly influenced by their diverse insights.

Within a co-creation approach, stakeholders and researchers come together to generate knowledge, ideas, and products. As different to traditional stakeholder engagement processes, **co-creation emphasizes partnership and shared responsibility**, moving beyond traditional models where development is done solely by experts or organizations.

Co-creation is evidenced in workshops, surveys, and interviews, but how could we have a truly stakeholder engagement process under a co-creative approach? Below is a summary of key points to consider, but we encourage you to visit the additional links referenced in Annex 6.

- **Lines are blurred between experts and end-users.** Mutual respect and equity is encouraged among collaborators (being researchers or stakeholders), ensuring that all voices with their respective knowledge and expertise are valued and heard.
- **The process is emphasized over the task completion.** The creation of shared values and a collective experience has equal -or even higher weight, than the outcome of the process as such.
- **There is a conscious effort to equalize power dynamics** among participants by removing existing hierarchies, such as those from experts and researchers, and decentralizing decision-making power from a few individuals.
- **It is an iterative process**, with ongoing dialogue and responsive to the evolving needs of participants, adapting **throughout the project lifecycle**, in contrast to a linear process with defined phases that limits flexibility.

A **sense of ownership and responsibility** is fostered among participants through a co-creation approach. It helps strengthen social ties and build community capital leading to increased loyalty and satisfaction, as stakeholders feel their input is valued.



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See Table 1: ‘Sources and additional reading on co-creation approaches to stakeholder involvement’ in Annex 6.

See Table 2: ‘Additional resources on the traditional forms of stakeholder engagement’ in Annex 6.

6.1. Planning and executing a stakeholder workshop

By following this checklist, you can ensure that your stakeholder workshop is well-organized, productive, and achieves its intended goals.

Pre-Workshop Planning

- **Define the purpose and objectives:** Clearly articulate the purpose of the workshop and the specific goals you aim to achieve. This could include the overall goals of the project, the expected outcomes of the event, and how these align with the interests and expectations of the stakeholders.
- **Identify which stakeholders to invite:** Define a profile of the stakeholder that should be present at the event. You can use this profile to select the most relevant actors from the list of stakeholders you mapped earlier.
- **Double check the final list of participants:** Is there a right mix of stakeholders? Is there diversity in gender, roles, and organizations? Who is missing from this list? Extra actions and efforts will be required to ensure that the missing voices are present at the event.
- **Develop the agenda:** Draft an agenda that outlines the main activities and allows for flexibility. Include icebreakers, brainstorming sessions, and time for discussion and feedback (see [Box 2](#))
- **Choose the Location and Format:** Decide on the best location (virtual or physical) and format for the workshop to facilitate engagement and productivity.
- **Send out the Invitations:** Send out invitations and the agenda well in advance to ensure availability and preparedness of participants. You could send an online calendar invite as then you can already monitor who has declined, accepted, or tentatively accepted the event. Do a follow up at least one week in advance to the meeting. By then the agenda of the event, including the purpose of the workshop and expected outcomes should be included in the invitation.

See Box 2: ‘Example of aspects to include in a stakeholder workshop’ in Annex 6. Some of these elements can also be included in the invitation to the event as that can help guarantee their commitment to the event.

During the Workshop

- **Facilitation:** Lead the workshop with a clear structure, keeping discussions focused and ensuring all voices are heard.



- **Engage participants:** Use a variety of activities such as brainstorming, process modeling, and prioritization to keep participants engaged and active.
- **Document discussions:** Record key points, decisions, and action items throughout the workshop to ensure nothing is overlooked. Remember to collect the Informed Consent forms (signed or at least acknowledged by email response) before initiating the recording of video or voice.

See Table 3: 'Additional resources on facilitating a stakeholder event efficiently' in Annex 6.

Post-Workshop activities

- **Summarize outcomes:** Prepare a summary of the workshop outcomes, including decisions made and action items identified.
- **Distribute a meeting summary:** Share the summary with all participants to reinforce understanding and commitment to the next steps.
- **Follow up on action items:** Schedule follow-up meetings or check-ins as needed to ensure progress on action items and maintain momentum.

See Table 4: 'Sources and additional reading on the process of conducting a stakeholder workshop' in Annex 6.

6.2. Effectiveness in stakeholder engagement processes

The effectiveness of stakeholder engagement efforts will be improved if the following strategic steps and aspects are considered during the engagement process. While **some of these elements refer to appropriate planning and sound methodological approaches**, much of the **effectiveness is related to building strong stakeholder relationships**. Fostering trust, showing empathy, and being responsive to stakeholder dynamics and changing circumstances are some elements which are part of building stronger relationships with stakeholders.

They are presented in a checklist format. As a general rule please consider common sense and also the “all extremes are bad” rule when operationalizing these aspects.

- Is it clear to you what your **stakeholders' needs, expectations, and concerns** are?

It is through an early engagement in the process that you will get this clarity. One-on-one communications are a good way to get this insight and at the same time clarify their expectations: what can you and the project really offer? If there are resource constraints for doing this one-on-one interaction, then focus groups or surveys could be used as a way to collect this information. Punctual clarification of misunderstandings would then be a follow-up action that at the same time will assist you in building trust with the stakeholder.

- Is it clear to you what are the **different communication strategies** preferred by your stakeholder?

Having regular updates is one of the tactics to keep the stakeholders interested during the project lifetime. However, awareness of the stakeholder's time and other resource constraints will help you outline specific strategies for keeping them informed of **relevant** project progress, milestones, and changes, and also for



giving them enough time to be able to provide timely feedback. Frequency (e.g., once a week, once a month?) and mode of communication (e-mail, newsletter, a phone call, a visit?) are things to agree with the stakeholder based on their preferences and the project's needs.

- Are the stakeholders aware of the **channels they can use to provide punctual feedback**?

Giving the space for having an open and transparent communication is an aspect that will assist in building trust with the stakeholder. It is not enough to set a communication channel (e.g. part of project meetings, one-on-one calls, email exchange), but also to have the commitment that the stakeholder feedback will be considered and acted upon, e.g. recognizing their contribution and involving them in decision-making processes.

- Have you established time in your calendar to do an **informal evaluation of the engagement effort**?
 - You could use the channels described in the previous item to evaluate the engagement efforts: are the stakeholders considering their needs being met? Are the stakeholders considering the communication to be clear and effective?
 - Be attentive to signs of stakeholder fatigue, such as decreased participation or increased complaints
 - You can use this feedback to refine and improve on your communication strategies. Adapting the strategies as the project progresses and you learn more about your stakeholders will contribute to ensuring the effectiveness of the stakeholders engagement process.

See Table 5: 'Sources and additional reading on effectiveness in stakeholder engagement processes' in Annex 6.

6.3. Dealing with powerful stakeholders

Powerful stakeholders can -because of their possession of resources, knowledge, or supported by existing narratives or discourses, be able to influence decisions and outcomes. It is important to be aware of their power, but approach them without a preconceived negative notion. In addition to the strategies described above, several additional approaches can help manage stakeholders that are considered powerful.

- **Be an active listener:** Actively listen to the stakeholder to understand their expectations, needs, and perspectives (see *Box 3: 'Key components of active listening' in Annex 6*). As active listening is rooted in empathy, stakeholders will feel respected and appreciated. **Identifying and directly addressing the stakeholder's priorities and concerns** can help build a connection and trust.
- **Plan individual meetings:** Alternative channels for stakeholders to share their perspectives, such as one-on-one meetings provide a space where the stakeholder's viewpoints and preferred solutions could be discussed in a more calm and open conversation. Insights and feedbacks could be discussed both ways and an agreed perspective could be then brought up to the meeting where more stakeholders are present.
- **Coalitions and alliances:** In situations where the powerful actors' input cannot be brought down to an equal playing field, coalitions and alliances among specific groups of stakeholders can be built in order to balance the influence of powerful actors and prevent them from dominating the agenda.

See Table 6: 'Sources and additional reading for dealing with powerful stakeholders' in Annex 6.



6.4. Managing a dominating or hijacking stakeholder

Hijacking participants may act so as a way to feel valued and a way to channel their eager participation. A combination of preparation and facilitation techniques can prevent specific stakeholders from hijacking or dominating the stakeholder engagement process. These techniques can be seen as to be used once the previously mentioned strategies have been applied.

- **Selective invitation:** Consider inviting the dominant participant only to specific segments of the event. In this way you can ensure a more balanced participation during for example critical brainstorming sessions, limiting the influence that this actor could have in this phase.
- **Balance the teams:** The influence of actors could be more evenly distributed if small teams are created. Groups could then have a balance of personalities and roles.
- **Clarify the rules of interaction** Use facilitation techniques (see *Box 4*), such as structured discussions and ground rules for respectful and inclusive participation to ensure all voices are heard and no single stakeholder hijacks the conversation. If necessary, have a private conversation with the dominating stakeholder to address the behavior and remind the importance of inclusive engagement.

See Box 4: 'Facilitation techniques for managing hijacking participants' in Annex 6.

See Table 6: 'Sources and additional reading for managing a dominant or hijacking stakeholder' in Annex 6.

6.5. Managing stakeholder fatigue

A series of strategic approaches that enhance engagement while preventing overwhelm.

They build on points mentioned in the previous sub-section, but specially aspects such as:

- **Setting realistic expectations from the start:** what is in it for them to participate? Clearly define what stakeholders can expect in terms of the added value of their participation, and their expected level of commitment (i.e amount and time dedicated to meetings) [2] [3]
- **Avoid the feeling of a “waste of time”**, for example, through a tailored stakeholder communication strategy (i.e type of information and frequency according to the stakeholder’s preference), and a common timeline that aligns with the stakeholders’ needs [2] [3]
- **Aim for true involvement of the stakeholder.** Participation in decision-making processes, recognition of contributions from the stakeholder can significantly enhance their motivation to remain engaged and fosters a sense of ownership and commitment to the project [1] [2] [4]

See Table 8: 'Sources and additional reading for managing stakeholder fatigue' in Annex 6.



Annexes

Annex 1: Glossary

A number of terms are used throughout this document that reference the ongoing and planned processes within BGG. In order to have clear and consistent communication, we define the terms as follows and use the standardized acronyms in their respective place in communication, as needed.

TERM	ACRONYM	DEFINITION	REFERENCE
HAZARD		The potential occurrence of a natural or human-induced physical event or trend that may cause loss of life, injury, or other health impacts, as well as damage and loss to property, infrastructure, livelihoods, service provision, ecosystems and environmental resources.	IPCC glossary
SCENARIO		Description of plausible future states (scenario narratives) based on assumptions about key relationships between drivers of change and trends. To challenge assumptions and explore alternative ways.	UNDP, 2022
CLIMATE PROJECTION		Climate projections are simulations of Earth's climate for future decades (typically until 2100) based on assumed 'scenarios' for the concentrations of greenhouse gases, aerosols, and other atmospheric constituents that affect the planet's radiative balance.	https://climate.copernicus.eu/
HORIZON SCANNING		Identifying and aggregating early indications of change, or emerging signals that may potentially exert significant impacts when they develop.	UNDP, 2022
MEGATREND ANALYSIS		Analyze data (signals and events) to identify patterns that indicate the directions of change and understand connections (correlations and causations).	UNDP, 2022
BACKCASTING		Technique of imagining a future where our goals and strategic objectives have already been achieved, then working back to identify the key steps and actions that lead to that outcome.	UNDP, 2022

CUMULATIVE IMPACT ASSESSMENT	CIA	Cumulative Impact Assessment is a process that evaluates the combined effects of past, present, and reasonably foreseeable future actions on the environment. It considers the additive, synergistic, and antagonistic interactions between different impacts over time and space. The goal is to provide a more holistic understanding of environmental changes and their implications for ecosystems and human communities.	Cooper & Sheate, 2002
DELIBERATION MATRIX		A multi-actor and multi-criteria evaluation e-tool which compares different scenarios, particularly in the context of policy experimentation and planning.	
INTEGRATED LAND-SEA MANAGEMENT	ILSM	ILSM is a framework designed to address the increasing anthropogenic threats to marine, freshwater, and terrestrial ecosystems by considering the ecological connectivity between these realms.	Reuter et al., 2016
PUBLIC PARTICIPATION		An umbrella term incorporating various forms of interaction with people, from informing and listening through dialogue, debate, and analysis, to implementing jointly agreed solutions.	Hügel & Davies, 2020
E-GOVERNANCE TOOLS	E-gov tools	Digital tools and platforms used to support governance processes.	/
STRATEGIC FORESIGHT FRAMEWORK		Strategic foresight is defined as the discipline of exploring, anticipating, and shaping the future. It uses a number of different techniques, including: Horizon scanning, Megatrends analysis, Scenario planning, Visioning.	Anghel, 2024
WATER-CLIMATE-BIODIVERSITY NEXUS	W-C-B Nexus	The relationship between water systems, climate, and biodiversity, particularly in the context of land-sea interfaces.	/
DIGITAL TWIN	DT	A digital twin is a digital representation of real-world entities or processes. Digital twins use real-time and historical data to represent the past and present and numerical models to simulate possible future scenarios.	research-and-innovation.ec.europa.eu
DOUBLE DIGITAL TWIN	Double DT	A digital representation that integrates real-world data and e-governance simulations for comprehensive analysis and planning.	/



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EUROPEAN DIGITAL TWIN OF THE OCEAN	European DTO	Aims to model the ocean's multiple components, provide knowledge and understanding of the past and present and create trustable predictions of its future behaviour.	research-and-innovation.ec.europa.eu
KEY PERFORMANCE INDICATORS	KPIs	Metrics used to evaluate the success of a project or an organization.	/
WATER CATCHMENT		An area where water is collected by the natural landscape, typically drained by a river and its tributaries.	/
STORM SURGES		Elevated sea levels caused by strong winds and low pressure during storms, often leading to coastal flooding.	/
COASTAL EROSION		The process by which coastlines are gradually eroded due to natural processes such as waves, tidal currents, and human activities.	/
EUTROPHICATION		The process by which a water body becomes overly enriched with nutrients, leading to excessive growth of algae and depletion of oxygen.	Cloern, 2001
POLICY EXPERIMENTATION GROUP		The Policy Experimentation Group refers to the key stakeholders that will be actively involved in the WP3 policy experimentation work. These include policy/decision-makers; environmental NGOs; business organisations and civil society associations. This group will be fundamental in the process of developing evidence-based land-sea governance schemes.	BGG D5.2 Communication, Dissemination and Stakeholder Engagement Strategy
HERITAGE FUNDS		The elements such as infrastructure, know-how, environmental assets, and economic activities that stakeholders wish to maintain and preserve over time	/



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Annex 2: Overview of issues and sectors prioritized by CS leaders.

ISSUES	SECTORS
a) Sea Level Rise b) Coastal erosion c) Storm Surges d) Extreme weather events (e.g. Pluvial floods, tropical nights, atmospheric storms) e) Nutrient runoff and Eutrophication f) Temperature increase (air and water temperature -> Water quality)	a) Fishery b) Agriculture c) Shipping d) Tourism & touristic navigation e) Natural & Protected areas management f) Urban planning (housing and infrastructure, privatization) g) Flood risk management h) Mining activity i) Shark risk management

Annex 3: Metadata table (extract)

The metadata table has been sent to CS leaders for the collection of the data to be used as inputs for the megatrend analysis and the CIA (that will be included in the BGG Dashboard).

ISSUES OR SECTORS PRIORITIZED		Name of dataset	Name of the table	Date of measurement	Spatial characteristics				Temporal characteristics		Public information				Internal information	
Is the issue/sector?	Reporting country				Is the data at grid level?	Type of data	Format	Temporal coverage	Spatial resolution	Is there a combination data base or does it represent spatial data from a data base?	Temporal coverage	Temporal resolution	Is the data available through a public website?	Is the data available through a public website?	Is the data available through a public website?	Is the data available through a public website?



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Annex 4: Template for stakeholder recruitment

As a way to attract and retain stakeholders is to be clear from the beginning on what will they gain from their participation in the project, what is expected of them, and what will be project gain from their participation. A template was created for case study leaders to adapt according to the particularities of their case study.

BGG's template for stakeholder recruitment can be seen in the next page, and also found in the BGG (Valencia) Sharepoint WP5 Comms and Dissemination > T5.2 folder > BGG stakeholder recruitment pager_2024_v1 (direct link [here](#)).

Please remember to add the BGG Project leaflet found also in the BGG (Valencia) Sharepoint WP5 Comms and Dissemination > T5.3 folder > BGG Leaflet.pdf (direct link [here](#)).

Challenges in **xxxxxx**?

The EU BlueGreenGovernance (BGG) project is looking for stakeholders that together with us will help **xxxxxx**.

This **co-creation** process takes place between actors along **[geographical place]** and the project's researchers. We are particularly interested in having representatives from policy and decision-making, environmental NGOs, business organisations, and civil society associations

The **BGG** project aims to develop innovative **land-sea governance schemes** based on scientific evidence and societal choices that link marine policies with the management of the land and inland waters. The project also aims to draw lessons **on how to trigger and facilitate institutional change** and policy reforms that would ease the implementation of EU and national marine policies.

We collected some questions that you might have at this point, but please feel free to reach out if there is something else you are interested in.



What will I need to do? We will ask you to **join us in [amount] online / physical workshops (month year, month year...)** where we will be **[goal of the event]**. We will also **ask you for one-to-one interviews** during **month year** that will allow us to understand the context and the problems that you face in terms of **xxxx**. Finally, we will organize **one online / physical workshop in year** where we plan to validate the results of our joint process with you one last time. Please note that your **participation is entirely voluntary** and at any point you may withdraw your involvement without the need of expressing a reason.

What is in it for me to participate? It gives you the opportunity to make a difference and to express any current concerns and concrete problems you may be experiencing in terms of **xxxxxx**. It will give you the chance to document that **xxxx** to comply with existing legislation on **xxxx**. We can take this information as valuable input for the development of our products (**the xxxx and the xxxx**). It gives you also the opportunity to be an *agent of change* and help us move the system away from its current “business as usual”.

What do BGG gain from my involvement? Your involvement will help us ensure that the **BGG** products (**the xxxx and the xxxx**) are **fit for purpose**, something that you will be able to **[concrete example of how they will benefit, e.g. apply as part of your daily job]**. Your input will also help us identify the right channels and approach to increase the legacy of these products.

Interested to know more? Feel free to contact:

[your name]

Gianluca Ferraro

[name of WP leader]

[your email]

gianluca.ferraro@port.ac.uk

[email]

[your affiliation]

University of Portsmouth

[affiliation]

[your role in the BGG project]

Project Coordinator

WPx

Note to the BGG researcher: remember to add the [BGG Leaflet.pdf](#) (and to delete this note from this document)

Annex 5: Template Consent form

Participation of stakeholders in any form of stakeholder engagement activities within BGG (e.g., interviews, focus groups, workshops, dialogue forums, surveys or observations) will be based on informed consent. Involved stakeholders need to indicate their approval in the form of a written consent. This confirmation can be done either with an electronic signature or by email.

Informed consents are meant to guarantee the stakeholders' voluntary participation and understanding of the research purposes and implications of their assent. Their role in the project, and how collected data will be used, as well as issues of data security, anonymity and confidentiality will also be clarified in this document.

All collected data and personal information are project-relevant and in accordance with the data minimization principle: no more data than necessary for the research and validation purpose will be collected, and no personal data will be gathered without the informed explicit consent. Storage, processing and communication of personal data will be undertaken in conformity with the Data Protection Directive 95/46/EC and the relevant laws in each country.

The templates are to be updated and adapted by the case study leaders according to the particularities of the stakeholder event, and also taking into account the local and national ethical requirements.

BGG's template for informed consent can be seen in the next page, and also found in the BGG (Valenica) Sharepoint WP5 > T5.2 folder > BGG consent form_2024_v2 (direct link [here](#))

Consent form for project participation

[researcher: please select as appropriate: interview / workshop /focus group...]

[Date], [Place]

You have been invited to participate in research under the **BlueGreen Governance** project through a **interview / focus group /workshop**. Before participating, please read the information below carefully. If statements in the document are unclear, do not hesitate to ask the contact researcher for clarification

Project summary



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Main goals of BlueGreen Governance (BGG):

- Develop innovative land-sea governance schemes based on scientific evidence and societal choices that link marine policies with the management of the land and inland waters.
- Draw lessons on how to trigger and facilitate institutional change and policy reforms for better marine policies.

Duration of the project: Four years (January 2024 – December 2027)

Coordinators: University of Valencia (Spain) and University of Portsmouth (United Kingdom)

Project Coordinator: Gianluca Ferraro Senior Research Fellow, University of Portsmouth
gianluca.ferraro@port.ac.uk

Purpose of data collection

[researcher: please insert a short sentence here explaining how the collected data will be used, for example, "The resulting data will be used to validate preliminary findings collected through literature review on the topic of xxx"]

Compliance with ethical and legal regulations

BGG complies with EU and national ethical and legal regulations, including the EU's GDPR (General Data Protection Regulation 2016/680) framework. All collected data and personal information is project-relevant and in accordance with the data minimization principle. All researchers associated with BGG are committed to ethical and responsible research practices in accordance with the EU's Article 8 (Charter of Fundamental Rights).

Privacy and data protection



- Original data resulting from **interviews/ focus groups / workshops** will be recorded and stored on secure servers accessible only to project partners.
- This data will not include any personal identification, so that data cannot be traced back to you as the data source.
- Data might be processed and analysed for publication in reports, scientific journals, and other forms of project outputs only in anonymised form.
- None of the data will be transferred to third parties. The original research data will be kept for five years after the project has officially come to its end in 2027
- **[researcher: feel free to remove this paragraph if you do not intend to take pictures or videos during your interaction with the stakeholder]** BGG project partners and project management team reserve the right to use any photograph/video taken at any BGG event. Pictures and videos will be taken in a way that the identify of participants is not revealed. BGG partners expressly refrain from using recordings in any way that might infringe the participant's privacy, reputation, dignity or integrity. Project partners and project management team may use the photograph/video in publications or other media material produced, used or contracted by BGG including but not limited to brochures, invitations, books, newspapers, magazines, television, websites, etc.

Withdrawal of participation

Participation is entirely voluntary. At any point, you may withdraw from participation by stopping the **interview/ focus group/ workshop** without the need of expressing a reason. This includes to have data deleted. There will be no negative consequences for you if you do not want to participate or withdraw your consent.

Researcher Contact

In case of any issues or questions, or to exercise your withdrawal of participation rights, you can contact:

Name: **[researcher: please write your name here]** and contact: **[researcher: please write your mail/phone number here]**



Consent statement

By signing this form, I state that I have read all information on this document of informed consent, I understand the information provided, and I agree with the terms and conditions provided on the informed consent document.

Name of researcher

Signature

Place and Date

Name of participant

Signature

Place and Date



Annex 6: Internal stakeholder guidance references

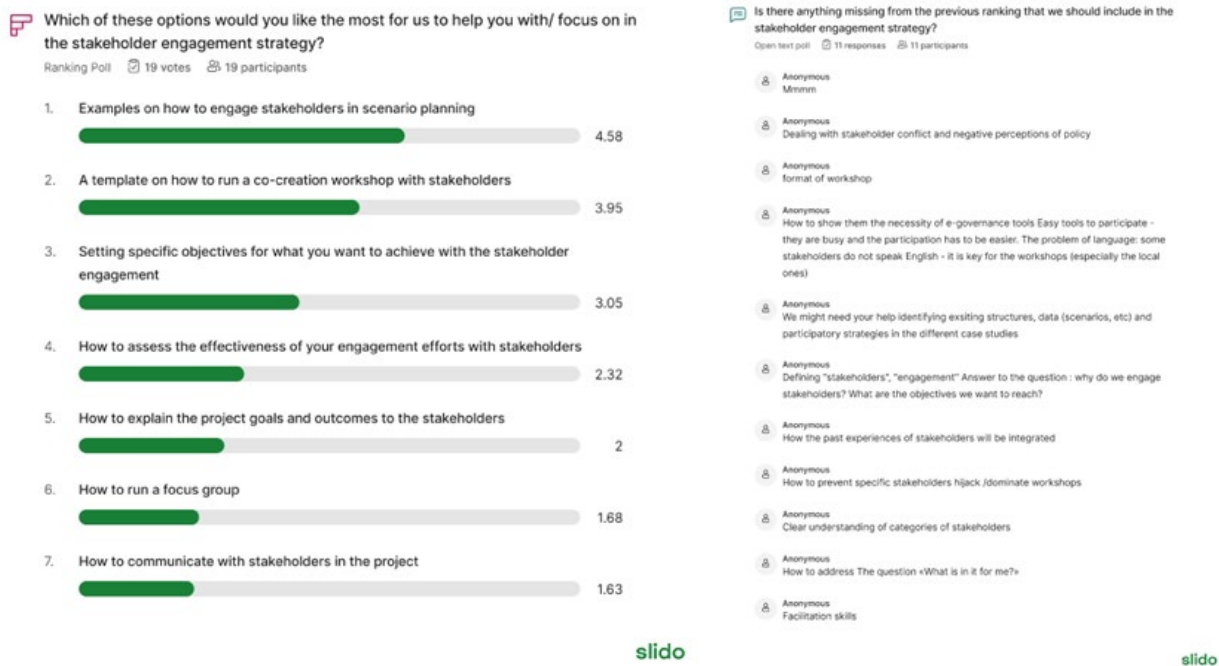


Figure 1: Results from the Slido exercise part of BGG’s kick-off meeting which served as the basis for the content of the internal stakeholder guidance.

Box 1: Co-creation, co-design and collaborative governance as defined in the Blue Green Governance’s Grant Agreement:

These concepts denote the increasing dependence of and interactions between the state on the one hand and stakeholders on the other hand. Governments can no longer solve complex problems on their own. They require the input and knowledge that stakeholders (scientific communities, individual citizens and societal stakeholders, businesses and industry) possess to identify problems and their solutions (Brandsen et al., 2018). The process of co-creation is considered important to the design and execution of this project, as co-creation can increase the problem-solving capacity of governments and promote shared understandings of problems and solutions (Jaspers & Steen, 2019).

Table 1: Sources and additional reading on co-creation approaches to stakeholder involvement:

[What is Co-Creation — updated 2024 | IxDF \(interaction-design.org\)](#)

[Design thinking | Methods and tools for co-producing knowledge \(naturalsciences.ch\)](#)

[What Is Co-Creation and Why Is It So Valuable? - Braineet](#)



[Fostering Co-creation and Collaboration in Design Thinking \(voltagecontrol.com\)](https://voltagecontrol.com)

<https://creativecommunities.uk/what-is-co-creation/>

Table 2: Additional resources on the traditional forms of stakeholder engagement:

Survey and Questionnaires	Questionnaires and surveys – MSP Guide
Semi-structures interviews	Semi-structured interviews – MSP Guide https://unalab.enoll.org/interview-guide/
Appraisal Interviews (evaluate past performances of an activity developed within a group and identify areas of further improvement.)	https://unalab.enoll.org/appraisal-interviews/
Public forums (share ideas, gain insight, and encourage public exchange)	Chapter 3. Assessing Community Needs and Resources Section 3. Conducting Public Forums and Listening Sessions Main Section Community Tool Box (ku.edu)
Focus groups (receive qualitative data for deeper understanding of community issues.)	Chapter 3. Assessing Community Needs and Resources Section 6. Conducting Focus Groups Main Section Community Tool Box (ku.edu)
Monitoring stakeholder engagement	Monitor Stakeholder Engagement: A 5-Step Process (simplystakeholders.com)

Box 2: ‘Example of aspects to include in a stakeholder workshop.’ Some of these elements can also be included in the invitation to the event as that can help guarantee their commitment to the event.

- Ice-breaker (e.g. “Tell us about your favourite memory related to water”).
- A quick presentation of BGG project, its objectives, main approaches, and main products.
- Define the scope and boundaries of the workshop (e.g. “we will be doing this...we will not be doing that...”).
- Clarity about the data involved – how it’s collected, handled, analysed? How confidentiality and anonymity are being managed. You could also indicate that the workshop is under the *Chatham House Rule* -see link in Table 3 below).
- Clarity about the expectations for participants. Explain what we want from them, here and now, in the room.
- Clarity about the added value gained by participants Explain what they can gain from giving input and from the project’s outputs.
- Finish with thanking everyone for coming and expressing your gratitude for their continuous involvement.
- Clarify what are the next actions (e.g. participants receiving a pager with summary of outcomes from the event)
- Coffee breaks (if physical meetings, consider 20 - 30 minutes as that gives the space for people to informally mingle, create connections, and approach the organizers with extra questions or comments; if online meeting consider a 10 min break from the screen every 45 min approx..)

Table 3: Additional resources on facilitating a stakeholder event efficiently

Acting as a facilitator	The Role of a Facilitator (mindtools.com) How to facilitate a successful workshop in 18 simple steps (howspace.com)
-------------------------	--

Table 4: Sources and additional reading on the process of conducting a stakeholder workshop

How to Conduct a Stakeholder Workshop - The Compass for SBC
Run a workshop with stakeholders NZ Digital government
Ice Breaking But Not Soul Breaking (substack.com)
8 tips on stakeholder engagement and event organization - Part 1 Europa Media Trainings
8 tips on stakeholder engagement and event organization - Part 2 Europa Media Trainings
Chatham House Rule Chatham House – International Affairs Think Tank

Table 5: Sources and additional reading on effectiveness in stakeholder engagement processes



How to Improve Project Stakeholder Engagement in 4 Steps (brightwork.com)
7 Winning Tactics For Stakeholder Engagement - (elearningindustry.com)
Success Through Stakeholder Engagement: How to Build Strong Relationships (float.com)
How to Improve Stakeholder Engagement Effectiveness (robblewellyn.com)
7 Strategies for Strong Stakeholder Engagement - Askel (askelsustainabilitysolutions.com)
The Ultimate 6-Step Stakeholder Communication Plan (filestage.io)
How to advance your stakeholder engagement strategy for real results (jambo.cloud)
4 strategies for effectively managing stakeholders LeadDev

Box 3: Key components of active listening.

Active listening involves **fully engaging with a speaker to understand their message**, rather than simply preparing to respond. There are five basis steps which are part of this communication technique:

1. **Pay attention:** Focus entirely on the speaker. Avoid distractions and set aside personal thoughts or rebuttals.
2. **Show that you are listening:** Body language and facial expressions can be used to convey attentiveness and engagement. Eye contact, an open posture, nodding can encourage the speaker to continue. Verbal affirmations like *yes* or *I see* can also signal that you are engaged in the conversation.
3. **Provide feedback:** Reflect on what has been said by summarizing key points or paraphrasing. Sentences on the lines of “What I hear you saying is...” can clarify understanding. Further discussions can be promoted by asking open-ended questions
4. **Defer judgment:** Avoid interrupting or formulating responses while the speaker is still talking
5. **Respond appropriately:** Acknowledge the speaker’s message. Be considerate and respectful on your feedback

Table 6: Sources and additional reading for dealing with powerful stakeholders

How to Deal With Difficult Stakeholders
5 Strategies to Deal with Difficult Stakeholders (consultationmanager.com)
(24) 8 Strategies for Managing Difficult Stakeholders LinkedIn
How to Deal with Difficult Stakeholders: 5 Rules of Engagement (korumlegal.com)
What Is Active Listening?
Hearing stakeholder engagement Active Listening: A Key Skill for Startup Success
United States Institute of Peace: What is Active Listening?



[How do you avoid misunderstandings and conflicts with stakeholders by applying active listening principles?](#)

[Stakeholder management: 4 strategies proven to work \(wrike.com\)](#)

[What are the top challenges in stakeholder engagement for complex systems design? \(linkedin.com\)](#)

Box 4: Facilitation techniques for managing hijacking participants

- Start with activities such as icebreakers and warm-ups. They can set a collaborative tone for the event promoting communication and participation.
- Keep discussions aligned by linking them to a specific workshop goal. This can help refocus the dominating participant into the shared objective.
- Off-topic ideas can be placed in the “parking lot” to be discussed at the end of the session. This will help to keep the workshop on track while acknowledging participant’s contributions. Make sure the agenda has dedicated time to address this space.
- The facilitator can also politely cut off tangents and encourage quieter participants to speak up.

Table 6: Sources and additional reading for managing a dominant or hijacking stakeholder

[How to Handle Dominating Participants in UX Workshops: 3 Tactics \(nngroup.com\)](#)

[Stakeholder Workshops | perseus \(perseus-net.eu\)](#)

[7 Winning Tactics For Stakeholder Engagement - \(elearningindustry.com\)](#)

[Common Challenges in Stakeholder Engagement | Scrum.org](#)

[How to Manage Common Stakeholder Issues and Challenges| Lucidchart Blog](#)

Table 8: Sources and additional reading for managing stakeholder fatigue

[How do you avoid stakeholder fatigue? \(linkedin.com\)](#)

[The secret to effective stakeholder engagement for applied Nexus solutions - GWP](#)

[BSR FAQ on Stakeholder Engagement](#)

[4 strategies for effectively managing stakeholders | LeadDev](#)



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