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Migration Impact Assessment

A Toolbox for Participatory Practices

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Foreword

Migration research has expanded remarkably during the recent years – both in terms of its scale and scope. As a phenomenon, migration has not only increased, but also become more nuanced and complex. Consequently, in addition to the various types of mobility and the cultural diversity of groups involved in migratory flows, the wide range of actors and stakeholders either directly or indirectly involved in the various phases of the migratory processes, levels of social and cultural diversity have grown. These unprecedented transformations with their multifaceted social, political, and economic consequences in both communities of reception and origin have fulled the importance in having reliable information and deeper knowledge about migratory patterns and the subsequent accommodation of diversity issues both by policymakers and scholars alike.

Amidst the prevalent lopsided, harmful – at times xenophobic social climate surrounding migration, depicting it oftentimes as security threat to be fought against, what tends to get overshadowed is migration is not only a normal, but also a positive phenomenon. It is rather the very framing it as a "problem", a "threat" or a "crisis that has fed fear, mistrust and hatred, and in so doing disallowing us to see – not to mention, capture – it its benefits. With a mounting shortage of workers, the resulting struggling labour market, growing debt, unfavourable demographics stemming from an ageing population, declining birth rates, and a cumulative brain drain, the European societies would appear to be in need of more migrants. While migration is, alas, back on the agenda, the discussion seems to be driven by emotion more than a reason – and political imperatives primarily by short terms economic needs.

Why the migratory challenge has been mounting has, however, less to do with the human mobility as such and more about its inefficient management and governance. Inefficient management tends to fuel public perception that erroneously sees migration as out of control and demands for policies stopping than facilitating human movement. A key part of the challenge stems from the observation that many scholars and stakeholders involved migration management alike lack the appropriate means or know-how to conduct their work efficiently. To gain reliable information and deeper knowledge about migratory patterns, needed for the subsequent ac-

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commodation of diversity issues migration brings along, adequate methods and tools are indispensable.

The formal policies aside, the migration landscape has changed so profoundly that the lessons of the past with respect to coping with increased diversity may no longer be applicable or relevant. Therein lies the underlying premise of the present handbook. With it, the Editors highlight and seek to tackle the absence of a comprehensive collection of methods and practical, user friendly tools for migration management fashioned for a broad range of practitioners. The handbook provides as a research and evidence based, demand oriented, migration governance practices advocating for a closer collaboration between scholars working on migration and the various stakeholders with practical expertise – and needs. The handbook pays a particular attention to the peculiarities in conducting evaluations and assessments in diverse rural and mountain areas, where the migratory dynamics – as well as those of the host society – tend to be remarkably different from the more commonly studied major urban areas.

The inclusion of migrants in rural and mountain territories is a multi-level and multidimensional process which needs to involve newcomers and receiving societies equally, but which also seeks to blur the social boundaries between these groups. The participatory methods adapted here underline that inclusion must be considered as a non-linear and reciprocal interaction through which new population groups negotiate new cultural meanings and concrete rights of citizenship with existing populations, within systems of socioeconomic, legal, and cultural relations that need to be considered in their essential features. Social innovation and continuous negotiation are the main aspects of these processes of inclusion and mutual recognition, which require dedicated policies at different territorial levels based on a new understanding of being local and of belonging. In this way, the handbook formulates empirically grounded recommendations and puts forth practical solutions to improve the local governance of migration in light of the peculiar needs and resources of rural and mountain regions.

This book has been developed as a toolbox for applied and practice-oriented migration impact assessment and evaluation. It provides an interdisciplinary collection of methods, designed to be used by researchers, but which can be used as a learning tool and reference for anyone interested in migration research methods, including students, policymakers and other professionals and practitioners. What follows is essentially a product of collaborative research stemming from the project 'Migration Impact Assessment to Enhance Integration and Local Development in European

Rural and Mountain Areas' (MATILDE), which received funding from the European Union's Horizon 2020 research and innovation programme under grant agreement No. 870831. This international research consortium of 25 partner institutions has sought to improve knowledge on the social and economic impacts of migration processes towards European rural and mountain areas.

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Acknowledgments

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1. Introduction

The field of migration and integration incorporates a wide range of actors and stakeholders, ranging from renowned researchers and young scholars in various disciplines to public administration practitioners, third sector and migrant-led organisations, civil society with its volunteers and economy, and politicians on various scales. The protagonists involved, however, often speak in different voices and at different volumes, and thus power asymmetries evolve. At the same time, migration and integration are frequently addressed as cross-sectional topics. The claim to include as many actors as possible and also to give voice to marginalised groups is reflected in a participatory perspective, in research as well as in practical social work that allows citizens to initiate bottom-up processes and co-create transformative measures. Participatory practices have become institutionalised in development studies and practices (Blackburn and Holland 1998) and are interlinked with particular methods and tools.

In this handbook, we want to address the absence of a comprehensive collection of methods and tools for migration studies that have a participatory orientation and an inclusive focus. We have derived such methods from our established research practice and are making them accessible here for practical everyday use by a variety of practitioners. In doing so, we aim to facilitate evidence-based migration policy and local governance practice. The demand for continuous reflection and evaluation of ongoing integration measures and the proper planning of needs and future processes is the result of the need of local administrations, policy-makers or third-party funders for justification. To assure evaluation also in municipalities where integration activities are not compulsory (e.g. Germany, Schammann and Gluns 2021) or in small municipalities where both funding and permanent personnel are limited, it is required to involve researchers or consultants who have to accompany administrators in monitoring and evaluating projects. We therefore argue for the close collaboration of research institutions, universities and practitioners.[1]

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1   In this book, we use the term 'researcher' for both researchers at research institutions and universities and 'practitioners' in public administration, non-profit organisations

In this book, we also highlight the peculiarities of the evaluation and assessment of social work with immigrants in rural and mountain areas, which are very diverse in nature. While some places have established professional schemes of migration and integration governance, others – for various reasons – have not. What they all have in common, however, is the involvement of volunteers, who often represent the backbone of local schemes. Thus, besides policy-makers at different government levels and practitioners in public administrations, we explicitly address third sector and migrant-led organisations and volunteers as target groups for this book.

Another consequence that arises from the diversity of rural municipalities is the need for immersion into local constellations. The context is shaped by complex interdependencies between the aims and practices of institutions, the availability of (infra)structure, local discourses and key stakeholders (ISDA framework, Schammann et al. 2021). It is crucial to become familiar with such settings to facilitate the construction of suitable modes of evaluation and assessment. This includes the identification of (1) (key) actors and stakeholders; (2) their current local debates and needs; and (3) the municipal/regional historical, political and economic background as well as their future development (demographic, economic and social). Thus, the methods and tools presented in this participatory handbook are designed to be place-based and aim to take into account local constellations and frameworks.

Moreover, we take a subject-centred approach that warrants face-to-face interaction with research participants and thus facilitates a participatory, empowering research style. In the realm of migration and integration governance, it is important to explicitly address a range of capacities for expressing oneself. Following Amartya Sen's capability approach (2001, 18) which values the 'capabilities' of persons to lead the kind of lives they value – and have reason to value', we acknowledge that different groups have diverse resources and capacities for self-expression (e.g. language or writing skills) and respond to this by means of a mixed methods approach. Sen (2001) argues for a '*two-way-relationship*' between capabilities and public policies according to which 'capabilities can be enhanced by public policy, but also, on the other side, the direction of public policy can be influenced by the effective use of participatory capabilities by the public'. At the centre

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(NPOs), migrant-led associations or for volunteers without institutional affiliation, since both carry out evaluation and assessment.

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of Sen's concept of development stands the freedom of individuals. 'The success of a society is to be evaluated, in this view, primarily by the substantive freedoms that the members of that society enjoy' (Sen 2001, 18). In practice-oriented research in the field of migration, interdisciplinary and transdisciplinary approaches are promising (see Infobox 1).

Infobox 1: Interdisciplinary and transdisciplinary research

While interdisciplinary research means the 'interaction between two or more disciplines' (McGregor 2004, n.p.) and 'new synergy emerges from the transfer of knowledge between disciplines' (McGregor 2004, n.p., based on Lattanzi 1998), transdisciplinary research does not just involve different disciplinary knowledges, but also integrates other stakeholders, practitioners and non-academics, which should help to target complex life world challenges (OECD 2020, 4). Transdisciplinary research tries to stimulate 'a new form of learning and problem-solving involving co-operation among *different parts of society*, including academia, in order to meet the complex challenges of society' (McGregor 2004, n.p.; based on Regeer 2002). Hence, transdisciplinary research takes up 'real-world' problems, involves different relevant disciplines and crosses disciplinary boundaries. The involvement of practical knowledge plays an important role in the appropriate analysis of real-world problems and the development of adequate solutions, strategies or measures, as well as their implementation. Transdisciplinary research integrates interdisciplinary scientific knowledge and links practical and scientific know-how, which should result in new scientific findings and/or strategies and solutions that are relevant for practitioners. Finally, the new scientific insights and practice-relevant solutions should become part of enhanced scientific and practical discourses (Bergmann et al. 2005, 15).

Participatory research goes even further and aims to conduct 'the research process *with* those people whose life-world and meaningful actions are under study' (Bergold and Thomas 2012, 192). Research questions should therefore be developed with the involvement of scientific and practical knowledge and perspectives, with the aim of benefiting both sides. Participatory research empowers the practice partners who are often the subject of research to represent and advocate for their own perspectives and interests. A major advantage of participatory research for co-researchers is that the research setting enables them to critically reflect and question everyday routines, established approaches and familiar problem-solving strategies.

To be able to harvest the advantages of participatory research, both sides, science and practice, need to develop a mutual understanding of each other's perspectives, needs, interests and working methods (Bergold and Thomas 2012). The transformation of roles – for example, of researchers, informants and respondents into participants – is reflected in our discussions on terminology (see Infobox 2).

> **Infobox 2: Informant – respondent – participant**
>
> Traditionally, individuals who provided information in ethnographic studies were called 'informants,' and the term is still used today by some social scientists and ethnographers. ln the past two decades, however, the term 'participant' has increasingly been used to describe individuals who take part in, especially, qualitative research. This evolution is due to both the negative connotations associated with the use of the word informant in criminal investigations and the trend toward the increased democratisation of research. The word participant connotes a more two-way process. The use of participant has not yet taken hold in other, more structured, forms of inquiry. 'Respondent' is still widely used, for example, to describe individuals who answer structured questions in survey research (Guest 2015, 224).

The selected research methods and tools in this book are conceptualised in a way that should enable the comprehensive face-to-face involvement of practical stakeholders; their aim is to foster a *participatory* (self-)assessment in the realm of migration and integration. Assessment means the 'systematic collection, review, and use of information about (…) programs and services undertaken for the purpose of quality improvement, planning, and decision-making' (State University of New York at Fredonia 2023, n.p).

Evaluation research uses scientific methods to analyse a specific *evaluation object (an intervention)*. This can be a product, programme, project, policy (field), law, public or private institution, method, system or person. The evaluation should consider the different relevant *stakeholders* (e.g. migrants, civil servants, NGO representatives) and quality criteria standards (e.g. ethical issues) (Döring and Bortz 2016, 979). To support high-quality evaluation, OECD (2021, 18) proposes the six following criteria:

- 'Relevance: Is the intervention doing the right things?
- Coherence: How well does the intervention fit?
- Effectiveness: Is the intervention achieving its objectives?
- Efficiency: How well are resources being used?
- Impact: What difference does the intervention make?
- Sustainability: Will the benefits last?'

However, an evaluation can be designed to fulfill different purposes, such as gaining information about and assessing the results, performance and effectiveness of projects or programmes, which should also foster the accountability of results; contributing to evidence-based judgements and policy-making; helping to improve the design or performance of already-running projects or programmes, or promoting institutional learning based on its results (Batra, Uitto and Feinstein 2022, 40).

As can be seen from this description, 'assessment' and 'evaluation' are not the same. While an assessment could be part of an evaluation (e.g., assessing customer satisfaction with training), the latter is a broader process that systematically collects information and focuses more on the effectiveness and impacts of programmes or policies. Likewise, although 'evaluation' and 'research' are similar things, they are also not the same. Research also gathers data, but puts an emphasis on the means by which knowledge is generated. On the other hand, in evaluation processes the knowledge gathered is central for informed decision-making (Mertens and McLaughlin 2004, 18).

Participatory evaluation is a special form of evaluation which involves those people in the evaluation who are affected by the investigated programme, policy or measure. Hence, the members of the target group become research partners who are not only used as informants, but get the chance to formulate, for example, evaluation questions relevant to them and/or to participate in designing the evaluation and the analysis and interpretation of data (Döring and Bortz 2016, 1014). 'Self-evaluation' is a form of participatory evaluation, in which practitioners themselves become evaluators. As they are the main users of the evaluation results, they themselves decide if, when and how their programme, project or measure should be evaluated. They decide what the evaluation will involve, and what it should focus on, and collect and analyse the evaluation data. However, practitioners need some training to be able to carry out self-evaluation on their own (Döring and Bortz 2016, 989). Self-evaluation, in turn, is a type of 'empowerment evaluation' as practitioners not only participate

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in the evaluation as research partners but also conduct the evaluation on their own. This also enables (empowers) socially less privileged groups to take an active role in improving their own living conditions. Professional evaluators only advise the practitioners on their self-evaluation (Döring and Bortz 2016, 1015, based on Fetterman 1994 and 2001).

As the explanations above show, an 'assessment' can be the beginning of an evaluation of integration work and the impacts of migration. It is recommended that this 'assessment' is verified and that work is done towards a systematic evaluation in order to also capture the effectiveness and broader impact of, for example, political programs (Mertens and McLaughlin 2004, 17-18).

Fig. 1: How assessment results inform the evaluation process, own graphic M. Gruber
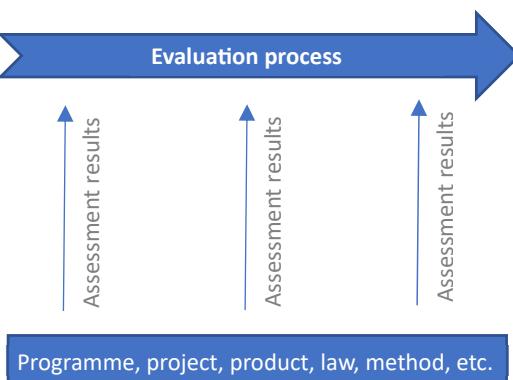
In order to get results that can be shared by the people they will later affect, it is important to involve them early in the process of evaluation, following the principle 'Nothing About Us Without Us', which was originally used by a global movement of organisations representing people with disabilities to foster their participation and equal opportunities in everyday life (United Nations n.d.). Moreover, as shown, this can promote the self-confidence and empowerment of disadvantaged people.

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How to use this book

This book has been developed as a toolbox for applied and practice-oriented migration impact assessment and evaluation. The tools are designed to be used by researchers in research institutions, but also by practitioners in public administrations, NGOs or associations. The book introduces the most important concepts of transdisciplinary and participatory research. Furthermore, the concepts of assessment, evaluation and participatory evaluation are explained and discussed.

The next chapter (chapter two) deals with key methodological presuppositions and challenges. Special attention is given to the role of the researcher in the research process. Factors such as the personality and attitude of the researcher play an essential role. To gain access to research participants, aspects such as trust, language and cultural particularities, the design of interview settings and familiarity with the locality, as well as ethical issues, all play important roles. Readers are referred to important terms and concepts in information boxes (Infoboxes).

The third chapter presents the individual tools that can be used for evaluating integration work and migration impacts. The explanation of the tools follows the same systematic approach: the possible applications of each of the individual data collection tools are presented, along with their advantages and disadvantages. The level of moderator involvement is also explained, as well as considerations that should be taken during preparation and the stages by which the research proceeds. Finally, information is given on how to document the results of data collection. For each tool, helpful hints or examples for practical application are presented in information boxes.

However, the process of evaluating migration impacts and integration processes does not end with the collection of data. In order to be able to draw important conclusions from the information collected, it must first be analysed and evaluated. In principle, several methods are available for this purpose. Following the logic of the book, which looks at data collection on its own, methods of participatory data analysis are presented in chapter four.

An essential part of participatory research is to reflect the results back to the people who participated in the data collection. This can also contribute to the dissemination of results. In chapter five, suggestions are given for the reflection and dissemination of findings and how research can provide an impetus for change (intervention research).

In the concluding chapter (six), the individual tools are presented in brief overview in the form of a factsheet. Detailed descriptions, including the corresponding references, can be found in chapter three.

The selected tools have been chosen for the evaluation of migration impacts and integration activities in rural and mountain areas. However, they can also be transferred to regions affected by transformative processes such as demographic, climate, societal or technological change.

2. Methodological presuppositions and challenges

As a result of the democratisation of research (e.g. citizen science, evidence-based processes), and a humanist paradigm that aims to adopt an insider perspective, participatory research styles that try to involve all kinds of people, including vulnerable people, in research and development processes, have become established as both popular and well known perspectives. Moreover, they allow for close collaboration with the practitioners and people affected on-site.

The formation of a participatory research tradition has been ascribed to critiques from within development studies of research as extractivist, sampling unequally and excluding people from decision-making processes (Chambers 1994a). It has been further influenced by activist participatory research (e.g. Freire 1968), applied anthropology and agrarian system analysis. In reaction, practitioners in development cooperation applied Participatory Rural Appraisal (PRA), which aims 'to enable local (rural and urban) people to express, enhance, share and analyse their knowledge of life and conditions, to plan and to act' (Chambers 1994b, 1253). With Participatory Action Research (PAR), a further developmental step took place, which combined two objectives: 'One aim is to produce knowledge and action directly useful to a group of people through research, adult education or socio-political action. The second aim is to empower people at a second and deeper level through the process of constructing and using their own knowledge' (Reason 1998, 271; for an overview see Beazley and Ennew 2006).

Participatory research also changes the understanding of the roles of researchers and participants (also called co-researchers, lay researchers, research partners). The focus is on learning from, with and through participants by enabling them to express their knowledge and preferences based on their own system of categories and values (Chambers 1994b). In order to include all kinds of people in research and evaluation processes, even those with disabilities or who are unable to read, write or understand/speak the national language, the tools and methods used should incorporate visual elements and reduce spoken and written ones (ibid.). Participants 'should have an active part in the whole process by examining, engaging, interpreting and reflecting on their social world and forming their sense of identity' (Hearne and Murphy 2019, cit. after Gruber et al. 2020, 21) and should be seen

as co-researchers, while researchers themselves are moderators and tutors in the learning process. Moreover, a linear research process is replaced by a cyclical one, since various iterations of planning, acting, observing and reflecting take place.

With regard to the degree of participation in the research or development process, the ladder of participation is a useful tool for critically reflecting on the level of participation. Arnstein's ladder of participation (2019, 26) contains eight levels, among which he identified two non-participatory levels and three further levels (information, consultation, placation) as 'tokenism'. Real participation is reached only from the levels of 'partnership' to 'citizen control'. The stage model of participation, we propose here, was used in the MATILDE project and is based on Straßburger and Rieger's participation pyramid (2014, 2019), in which the highest level of participation is achieved if decision-making power is completely delegated to citizens. In the MATILDE project, the highest level of participation is achieved when citizens (e.g. migrants) work together with policy-makers and other stakeholders to develop solutions to problems in their living environment.

Fig. 2:   Participation pyramid based on Straßburger and Rieger (2014, 2019) and the MATILDE project (terms in brackets) (Gruber et al. 2020, 34)
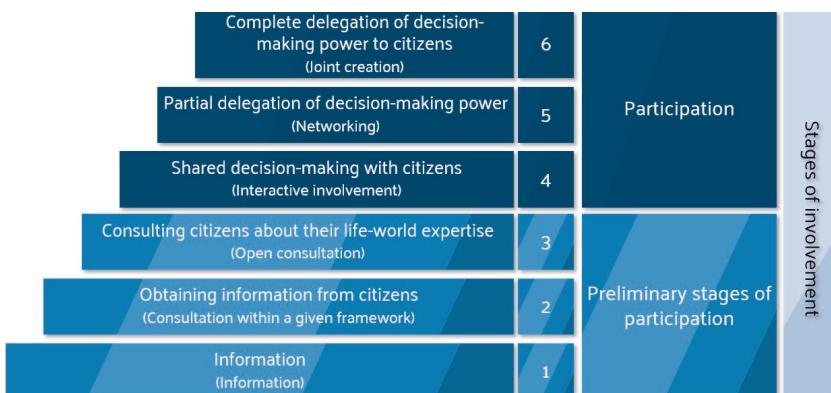
While participatory processes are now initiated for many political measures, and citizens are at least informed and consulted, a complete transfer of decision-making power can often not be achieved in practice. However, the degree of participation can vary throughout the development process.

Since we want this book to be read by a range of target groups and individuals with different backgrounds, from experts (such as politicians or

company managers), to people involved in everyday encounters with migrants (including civil servants in public administrations, employees of NGOs, members associations or relief groups and finally immigrants themselves), some methodological presuppositions are presented below. These reflections address the positionality of researchers in the research process in general, and in the interview situation as a form of social interaction in particular, encompassing access and trust as important prerequisites not just for face-to-face interactions but also for collecting valid data. They also include language and cultural peculiarities, since these play an important role in interactions with migrants, and a discussion of interview settings. We also elaborate on the aforementioned process of becoming familiar with the locality and focus on ethical issues.

2.1. Positionality of researchers

Debates on power structures and the hierarchies that often become evident in othering processes – that is, identity construction through distinguishing oneself from the 'other' (Said 1978), and a way of speaking *about* instead of speaking *for* (Neuburger and Schmitt 2012) – currently influence both work and the social sciences. In the course of the othering debate, the normalisation of the self and the connotation of the other as deviant implies superiority (Gregory 1998; Husseini de Araújo 2011), which then results in the positioning of the researcher as a (superior and) distant outsider. Awareness of the dichotomising categories of outsider and insider might be a first step in challenging unequal power structures. The humanist turn in geography, for instance, focused on such dichotomies (Buttimer 1999), while more recently, current debates in feminist theory and postmodernism continue to make efforts to reduce them (Merriam et al. 2010).

Certain markers, such as name, profession, gender, age, physical appearance, clothing, use of language, family status, religion and many more, can influence the hierarchy in the relationship between a researcher and participants and can ultimately have an impact on power, respect and trust. When researchers are motivated to reflect on their own reactions, they can be sensitised to such hierarchies, which enables them to strike a balance between maintaining distance and identifying with participants (Kordel et al. 2018).

The prerequisite of a reflexive attitude throughout the research and assessment process is acknowledgement of one's own privileged position and understanding of one's own perception as just one way of seeing among

others. Reflexive researchers are aware that they do not just collect facts and establish a single truth, but rather construct their interpretations on the basis of their personal field experiences (Hertz 1997). As Finlay puts it, 'with reflexive analyses, the researcher is aware of experiencing a world and moves back and forth in a kind of dialectic between experience and awareness' (Finlay 2002, 533). Throughout the research process, people's subjectivity should be at the core. In order to engage with the perspectives of participants, Husserl (1970) suggests phenomenological reduction; that is, the exclusion of personal views and attitudes. Researchers should be actively reflexive during the preparation and implementation of an evaluation or assessment and the analysis of results.

2.1.1. Access and trust

Especially in the initial phase of the research process and when it comes to sampling and recruiting participants, access and trust is crucial and predetermines the successful accomplishment of interviews and workshops as well as the output of valid and reliable data. Trust between researchers and participants is important, to avoid the potential for interviewees to feel emotionally or physically threatened (RatSWD 2017) and simultaneously forms the basis of an authentic interpersonal relationship (Miller 2004). To establish trust, gathering information about participants and their life worlds, and especially the first contact – which might be facilitated by gatekeepers – is crucial (Donà 2007; Kabranian-Melkonian 2015). A gatekeeper might be a member of the ethnic community or a volunteer or social worker (Curry et al. 2017). Moreover, as McDowell (2010, 162) notes, the behaviour of researchers is of great importance for getting access to groups and places: '[Researchers should] construct an encounter in which the exchange is both sufficiently collaborative to make the 'respondents' feel comfortable and that their participation is highly valued, while at the same time not being intrusive or too focused on the interviewer's own life, values and beliefs'. Following this logic, it is recommended that researchers adapt to the surroundings to a certain degree, by means of their clothing, behaviour and their use and management of time (Kearns 2010). Accordingly, commonalities between the researcher and the participant can be highlighted to achieve trust (Donà 2007), the basis of which must also be made transparent during the course of the research process.

Finally, apart from trust, providing the target group with timely information about the research project, by means of social and local media or visits to places they frequent (e.g. language courses), has been seen as an important way to access participants and can therefore increase the rate of participation (Harris and Roberts 2011; Elliott and Yusuf 2014). Information for the target group should be concise and conveyed in appropriate (straightforward) language.

2.1.2. Language and cultural peculiarities

Sharing a common language represents an important means of building trust. In order to overcome language barriers, technical advice – for example, translation by means of smartphone apps – or interpreters can be incorporated into the research process. In the latter case, the distribution of roles is affected, since the intervention of translators can increase the distance between the researcher and the participant (Block et al. 2013). Thus, the role and its positionality must be critically evaluated, especially if the interpreter belongs to the same community as the participants or has a similar background, such as having had experience of being a refugee or if they have come from the same country. To reduce concerns, participants facing language challenges should be able to make their own decisions about what language they communicate in and whether to use an interpreter (Huisman 2011; Kissoon 2011; Elliott and Yusuf 2014; Fozdar and Hartley 2014; Wernesjö 2015). Mistranslations are mostly related to metaphorical language, connotations or local peculiarities and can be reduced by involving the interpreter in cross-checking primary/secondary data and the interpreted results. Financial issues and an interpreter's availability in terms of time should be discussed beforehand (Burja 2006).

2.1.3. Interview settings

Besides the above-mentioned issues, the interview setting itself – place, time and interpersonal relations – represents an important factor in success. Interview locations should be known to participants and be perceived to be safe and secure. Thus, the interviewer should be flexible about the selection of places and include participants in the decision (Harris and Roberts 2011; Penman and Goel 2017; Ziersch et al. 2017). Interview locations may be private

or professional places, such as workplaces in the case of experts, the flats and apartments of migrants; or (semi-)public places, such as cafés, restaurants or libraries (Poppe 2013; Dandy and Pe-Pua 2015). Noise and interruptions caused by someone leaving the room, or by children, family members or neighbours, should be avoided during the interview (Huisman 2011). To enable parents with small children to participate, consideration shold be given to the use of assistants to provide childcare (Farber et al. 2018). In some cases, it might be enough to provide food and drink to help create a comfortable interview setting, particularly if one suspects the interview might go on a long time (Dandy and Pe-Pua 2015; Farber et al. 2018). For volunteers, and migrants especially, whether they are included as individuals or in groups, it is important to be aware that they are spending their free time and consider some (financial) compensation (e.g. for travel costs) or other incentives (Kissoon 2011, Farber et al. 2018).

2.2. Becoming familiar with the locality

Becoming familiar with the peculiarities of both the locality and the people in it is crucial for the interviews and discussion to be rich in both content and substance. Thus, intensive preparation for the fieldwork itself is necessary. Jagger et al. (2011) remind us to consider, firstly, the political context – including (in)formal hierarchies, resources and access, and the political and economic history – and secondly the cultural context. This could be achieved by reviewing the region's particular and local characteristics and, in some cases, by additional research on the concrete locality and stakeholder land-scape. Researchers should also immerse themselves in the field, although the degree of immersion strongly depends on the aims and method to be applied. If external participants are going to be involved, where they choose to live and what they choose to eat can reduce the distance between the researchers and participants (Jagger et al. 2011). A structured site visit, including participant observation or simply hanging around in a specific locality could enhance the understanding of local peculiarities (Althaus et al. 2009) and prevent the drawing of early conclusions. In the context of research with migrants, hanging around with migrants (Rodgers 2004) and informal conversations (Miller 2004), were both clearly highlighted for their value in getting to get to know the life worlds of individuals and for approaching participants (see also Tool Municipality Profile chapter 3.1).

2.3. Ethical issues

Collecting empirical material from individuals, especially those who may be particularly vulnerable, means that it is important to consider ethical aspects (Kabranian-Melkonian 2015; Roth and von Unger 2018; von Unger 2021). Any interaction with these subjects should take place within the appropriate guidelines on data collection, security and protection. In line with the European Commission's Guidance Note on research on refugees, asylum seekers and migrants, the principles of sensitivity, objectivity, transparency, avoidance of ethnocentricity and rigorous safeguarding of participants' dignity, wellbeing, autonomy, safety and security need to be applied, while participants' values and their right to make their own decisions must also be guaranteed. Unexpected, incidental, or unintended findings that are not harmless need to be reported in line with national legislation. Informed consent or alternative forms of consent must be sought from participants, while sensitive personal data need to be protected and anonymisation techniques applied (Kabranian-Melkonian 2015, Clark-Kazak 2017; see Infobox 3). A peculiarity of rural and mountain areas is that the degree of anonymisation must be considered: the fact that very few actors and stakeholders live in such places often allows for the easy identification of stakeholders (Stachowski 2020). Thus, special attention must be given to anonymisation.

Infobox 3: Checklist for Researchers (Clark-Kazak 2017, 14)

1. Do I need ethics approval for this project? If so, how can this be obtained?
2. Where applicable, have I shared my ethics protocol with relevant partners?
3. Who will benefit from this research?
4. Who else is doing research on this topic and with this population? Have we coordinated efforts to avoid over-researching?
5. What are the potential limits of confidentiality? What strategies do I have in place to deal with situations where criminality, exploitation or self-harm are disclosed?
6. Who is not included in my proposed research? How can I facilitate the participation of these individuals?

7. How will I include relevant partners in all phases of my project: from design to dissemination? What mechanisms and protocols are in place to ensure full participation?
8. Have I factored into my project budget compensation for the time and other resources non-academic partners invest in research, including as respondents, serving on advisory committees, recruiting other respondents and facilitating the participation of other respondents?

The International Association for Public Participation (2017) provides a Code of Ethics for Public Participation Professionals as a basic framework for ethical standards in public participation processes and respectful and effective interactions with stakeholders:

1. *Purpose:* Supporting public participation as a process to make better decisions that incorporate the interests and concerns of all affected stakeholders and meet the needs of the decision-making body.
2. *Role of practitioner:* Enhancing the public's participation in the decision-making process and assisting decision-makers in responding to the public's concerns and suggestions.
3. *Trust:* Undertaking and encouraging actions that build trust and credibility for the process among all the participants.
4. *Defining the public's role:* Carefully considering and accurately portraying the public's role in the decision-making process.
5. *Openness:* Encouraging the disclosure of all information relevant to the public's understanding and evaluation of a decision.
6. *Access to the process:* Ensuring that stakeholders have fair and equal access to the public for the public participation process and not advocating for interest, party or participation process and the opportunity to influence decisions.
7. *Respect for communities:* Avoiding strategies that risk polarising community interests or that appear to 'divide and conquer'.
8. *Advocacy:* Advocating project outcomes.
9. *Comments:* Ensuring that all commitments made to the public, including those by the decision-maker, are made in good faith.
10. *Supporting practice:* Monitoring new practitioners in the field and educating decision-makers and the public about the value and use of public participation.

Further Reading: Iosfides 2011, Stachowski 2020

3. Data collection techniques

We present data collection techniques here, according to their uses in the assessment and evaluation process, starting with the municipality profile as a tool for becoming familiar with the locality and to describe challenges and ongoing discussion. This tool is therefore particularly suitable during the exploration phase. Qualitative interviews, focus groups and Open Space Technology could also be used, while all could also be focused on specific topics that have already been identified. Observation and mapping methods, as well as further tools that incorporate visual material, are more advanced methods and often require greater resources.

3.1. Municipality profile

3.1.1. Facts and figures

The municipality profile is intended to help actors get an overview of the current situation and possible future pathways and can stimulate comparisons with other municipalities. Quantitative and qualitative assessment could address, for instance:

– the current demographic situation and future prognoses,
– the economic and labour market situation,
– the educational background of the population,
– infrastructure and general basic services, such as education, healthcare facilities, places of encounter,
– the budgetary situation,
– social cohesion and current public debates and challenges, and
– further peculiarities.

The municipality profile can be created at a range of scales, not just at the level of municipalities, but for districts, provinces or (Federal) States. The number of participants and composition of groups must be adapted accordingly.

+ *Advantages:* A municipality profile can achieve the goal of 'becoming familiar' with a locality, based on statistical data and qualitative evaluations. If a variety of participants is selected, multiple perspectives can be included. It also stimulates interaction and discussion between participants and can identify discourses and challenges in the exploratory phase of an evaluation or development process.

— *Disadvantages:* Creating a municipality profile can be very resource-intense and time-consuming, especially in cases where there is data missing. Participants should therefore either agree on which data are necessary for the concrete process, or consider the tool as one that is both valuable and useful for further processes.

Level of moderator involvement: The role of the researcher is to identify available data and to select the participants who become further involved in the process.

#	Number of municipality profiles	Depends on the research aim, saturation rule is applied.	Acknowledge the availability of people, especially experts in small-scale settings, e.g. rural areas.
👥	Number of participants	Depends on the size of the municipality, 5-10 as a core group; if a short survey is included, even more.	
⏱	Duration of municipality profile	4–12 weeks	If a process needs to be completed quickly, more responsible persons should be nominated.

3.1.2. Preparation

In the preparation phase, check for the availability of pre-existing data. For instance, possible sources include:

– EUROSTAT, Statistical Offices at (Federal) State level,
– data collected by municipalities themselves, and
– those collected by NGOs, foundations and associations.

It might be possible to get all the necessary data for the compilation of a municipality profile by requesting it from the above-mentioned institutions. It might also be necessary to carry out short additional surveys. Digital

tools, like Mentimeter, MS Forms or feedbackr should be included and questionnaires should not exceed 2-3 questions.

Before the process starts, it is important to reflect on which stakeholders need to be included in order to get a holistic picture of the municipality.

3.1.3. Implementation

The following steps should be considered:

1. Agree on a moderator, e.g. from the public administration in the municipality.
2. Explain why a municipality profile is being created and what will happen to the collected information.
3. Define the aims – for example to obtain an up-to-date overview of the current situation in the municipality, to assess the impacts of demographic transformations such as immigration, to foster exchanges between stakeholders, so that the results can be used to draft policy recommendations.
4. Discuss open questions on information missing from the template, which can reveal what is necessary, for example, in the design of a focus group.
5. Document statistical data and the outcome of discussions in the template.

Documentation

Notes

3.2. Qualitative (in-depth and narrative) interview

3.2.1. Facts and Figures

Definition and application: A qualitative interview is commonly treated as a form of conversation with a purpose – to provide more in-depth information to reflect on and think about (Legard et al. 2003). The design of qualitative interviews can be more or less structured, varying in openness accordingly. The *problem-centred expert interview* as a special form of qualitative interview aims to unravel interpretational and orientation knowledge from experts (Bogner et al. 2009). Expert knowledge gathered through professional or volunteering practice comprises an institutionalised competence to construct reality. The *narrative interview* is an open and less structured form of qualitative interview that aims to solicit individuals' experience of events and situations to understand peoples' views and practices in their social context (Clandinin 2007). Narrative interviews can be focused either on someone's entire biography or on a specific period of time. Using a qualitative interview to generate narratives by inviting people to recall a particular situation from the past can help to contextualise their perspectives in the present.

+ *Advantages:* Qualitative interviews offer the chance to grasp individuals' meanings, based on their expert knowledge or their experience, and thus contribute to a deeper understanding of how people construct their realities in national, regional or local settings.

— *Disadvantages:* Qualitative interviews take time and require a significant number of personnel and proper preparation. Participants have different levels of experience of (open) interview situations and differing narrative competences, which is challenging. Thus, interviewers should check in advance whether there are more chatty or shy participants involved and try to adapt to this.

Standardisation: On the one hand, similar questions and procedures can be used across groups in order to achieve comparability. On the other hand, however, an 'exploratory, open-natured format may be more consistent for scholars dedicated to the goal of not imposing the research's assumptions or interpretations of the research' (Skop 2006, 120); that is, it might be better to take an inductive approach.

Level of moderator involvement: The researcher's role is to direct the interview process; they must be clear about how to manage the interview effectively so as to achieve the aims of the research. Interview guidelines help to control the progress of the interview to some extent: they mostly serve as an orientation and should be understood as a checklist to be ticked throughout the interview. Simultaneously, and depending on the aim of the interview, a participatory research style can also retain flexibility and give the participant the feeling they have an influence on the progress of the conversation to some extent.

#	Number of qualitative interviews	Depends on the research aim, saturation rule is applied.	Acknowledge that certain people, especially experts, may not be available in small scale settings.
	Number of participants	Ideally one per interview.	If more than one participant is present, try to avoid hierarchical situations that may affect responding behaviour, but make use of the joint experience, of, for example, couples.
	Duration of qualitative interview	Variable, depending on the availability of participants.	

3.2.2. Preparation

Sampling: While there are no closely defined rules for sample size, sampling in qualitative research usually relies on small numbers with the aim of studying in depth and detail. Seeking rich information about a particular phenomenon, the sample is derived purposefully rather than randomly (Marshall 1996, Tuckett 2004) (see Infobox 4).

Infobox 4: Sampling methods in qualitative research

- *Theoretical sampling:* necessitates the creation of interpretative theories from the emerging data and selecting a new sample to examine and elaborate on this theory.

- *Judgement sampling:* the researcher actively selects the most productive sample to answer the research question. This can involve developing a framework of variables that might influence an individual's contribution and will be based on the researcher's practical knowledge of the research area, the available literature and evidence from the study itself.

- *Convenience sampling:* the least rigorous technique, involving the selection of the most accessible subjects. May result in low quality data and little intellectual credibility.

Locality: When thinking about where qualitative interviews will take place, researchers should consider the preferences of the participant, for example by choosing their workplace in the case of professionals or private/semi-public spaces in the case of migrants.

3.2.3. Implementation

The interview guidelines explain how to conduct qualitative interviews and follow a dramaturgical order, mostly starting with an *opener*, moving to the *main part* of the interview and ending with a *summarising section* and *outlook.* In most cases, asking participants to re-affirm and complete their *socio-statistical data* is done at the very end of a qualitative interview. Narrative interviews usually include one or more long period(s) of storytelling, which should not be interrupted by interventions from the interviewer (see Infobox 5).

Qualitative research methods are commonly based on face-to-face interactions or, as Berger and Luckmann (2009) put it, 'the fundamental experience of the other is that of face-to-face. The vis-à-vis situation is the prototype of all social interaction. Any other form of interaction is derived from it' (ibid., 31, translated by D. Spenger). For this reason, audio (telephone) interviews have long been unpopular in qualitative research (Novick 2008). Nowadays, audio and audiovisual interviews represent an important alternative, which is discussed in the following sections:

Audio interviews

As Misoch (2015) points out, audio interviewing can be useful in all forms of semi-structured and episodic interview. Carrying out narrative interviews by telephone, however, has proven to be problematic.

+ *Advantages of audio interviews*

- lower travel costs, increased efficiency, wider geographical spread;

- in methodological terms: as visual elements are absent, the interviewer does not influence the participant's storytelling as much (Misoch 2015);

- thanks to greater anonymity, interviewees show greater openness and willingness to talk about sensitive topics than in physical interview situations (Blee 2003, Schulz and Ruddat 2012);

— *Disadvantages of audio interviews*

- non-verbal, or exclusively visual signs of encouragement to continue speaking or to indicate consent are absent, which further intensifies the power asymmetries of the communication (ibid.);

- a high dropout rate is to be expected (ibid.);

- a lack of visual control over the interview setting, since 'channel control is effected by small non-verbal signals, mainly head-nods, and eye movements' (Argyle 2009, 72);

- the interviewer has no knowledge of the participant's current environment and no influence on whether there are others present who might be crucial to the atmosphere of the interview (e.g. in interviews with young people) (Misoch 2015);

- it is not possible to make use of breaks. During face-to-face interviews, breaks can signal that the interviewee is concentrating but in audio interviews '[t]here is a marked tendency to avoid silences […], and long silences over the telephone are considered improper and rude' (de Leeuw 1992, 15).

Audiovisual interviews

Audiovisual online tools, such as video calls, are a step further towards face-to-face communication, if participants consent. Opportunities for online

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interviews are various and their popularity is growing fast in contemporary research (Deakin and Wakefield 2014; Nehls et al. 2015).

+ *Advantages of audiovisual interviews*

- a certain degree of 'social presence' reinforces the confidence of interviewer and participant (Misoch 2015);

- potential for greater access to participants, both geographically and with regard to being able to interview less mobile persons (ibid.);

- Although technical resources are a prerequisite, group interviews can be conducted via online audiovisual tools, and the dynamics of distinct social groups can therefore be traced (ibid.).

— *Disadvantages of audiovisual interviews*

- a lack of olfactory, tactile or gustatory elements;

- technical problems can arise during the interview (e.g. video quality, microphone quality) and disrupt the conversation (ibid.);

- due to relatively greater anonymity, video calls are less reliable and cancellation is more likely (Deakin and Wakefield 2014, Misoch 2015).

Documentation

Notes   Recordings
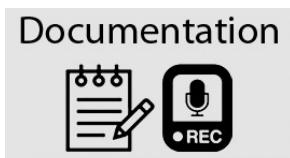
Infobox 5: Suggestions and advice for interaction in interview situations

To get participants to tell their stories and give full and unbiased responses, various practices should be avoided (Legard et al. 2003):

- never assume: It is essential not to assume that you understand the facts, without giving the interviewee the opportunity to explain the meaning of the terms they have used; similarly it is essential not to assume that the reason for a particular course of action or belief is clear, if it has not been made explicit by the participant.

- refrain from commenting on an answer: Although it may help to establish a trusting relationship between the researcher and the participant, commenting on an answer by saying something like 'that´s interesting', can introduce an element of judgement and interrupt the flow.

- refrain from summarising an answer: Attempts to summarise an participant's full meaning may seem patronising to them. It is likely that the summary will be partial or inaccurate. If the researcher needs to check whether they have understood a response correctly, they should do so in the form of a direct question.

- refrain from finishing a participant's answer: Avoid putting words into the participant's mouth however tempting it may be to complete their answer. It is better to ask a further question that will help them to make their point.

- avoid extraneous remarks such as 'right', 'okay', 'yes' or 'I see', which can encourage the participant to close down, seeing what they have already said as sufficient. Prefacing questions with 'and' or 'so' is another habit of new and nervous researchers, but it results in a tone which is less spontaneous and relaxed.

Instead, receptive signals ('hummmm', nodding, smiling) may do more to help maintain the narration. Moreover, interviewers must be able to tolerate silence for a while.

3.3. Focus group

3.3.1. Facts and figures

Definition and application: Focus groups are a special form of group discussion, where data are collected through group interaction on a topic determined by the researcher or participants (Morgan 1996, cf. Krueger 1994). They are used to 'uncover the 'world-views' (especially regarding attitudes, perceptions and experiences) of different groups of people (…) in a variety of locations' (Skop 2006, 121). They are therefore used in both the exploratory phase of research to generate hypotheses or identify problems and in the validating phase, e.g. for examining the acceptance of options or discussing potential strategies (Pratt 2002; Schulz 2012).

+ *Advantages:* Focus groups offer the chance to grasp the effects of group dynamics and controversies (Bedford and Burgess 2001, 124, cit. after Skop 2006; Schulz 2012). By means of spontaneous expressions and interactions, they stimulate new ideas and questions (Pelz et al. 2004; Cyr 2016). Focus groups may also provide a forum for the perspectives of disadvantaged or marginalised groups and provide a means to overcome feelings of systemic exclusion (Skop 2006; Carey 2015), thus constituting a potential element of participatory action research and empowerment (Skop 2006; Gailing and Naumann 2019). They encourage reflective research practice (Skop 2006), since participants may finally question researchers' assumptions, preventing them from jumping to early conclusions (Kamberelis and Dimitriadis 2013) and may thus be able to reduce the imbalance in power relationships between researcher and participants (Gailing and Naumann 2019).

— *Disadvantages:* By contrast, group dynamics may prevent individuals from talking freely (Littig and Wallace 1997) and lead to censoring or conforming (see also Skop 2006). Simultaneously, they may create 'chatterboxes' and '(wo)men of few words', a situation that calls for a high level of moderator involvement (Bennett 2002; Hollander 2004; Schetula and Gallego Carrera 2012; Schulz 2012), making individual narratives difficult to grasp. In addition, a too-rigid orientation to the interview guidelines, or too-rapid change

of topic, and mistakes in time-management, may compromise the 'success' of focus groups (Vogl 2014).

Standardisation: On the one hand, to achieve comparability, similar questions and procedures can be used across groups (Morgan 1996; Skop 2006). On the other hand, however, the 'exploratory, open-natured format may be more consistent for scholars dedicated to the goal of not imposing the research's assumptions or interpretations of the research' (Skop 2006, 120). Morgan (2002, cit. after Skop 2006) suggests a more closed character with predefined questions during the first, and a more open character during the second part of a focus group.

Level of moderator involvement: Generally, the role of researchers (or moderators) is to facilitate discussion in a less-directed way, as the focus is on the participants and the relations between them (Parker and Tritter 2006). However, since the researcher wants to collect data, he or she may want to control the discussion, ensuring that relevant topics are discussed (by, for example, directing attention away from what are deemed to be less important issues) and that participants are able to interact (by trying to get everyone to participate equally in the discussion) (Morgan 1996). Benighaus and Benighaus (2012) distinguish two types of techniques for moderators: a) Questioning-route-technique, where core questions are prepared beforehand and the moderator 'machines off' the questions, fostering comparability between focus groups and facilitating the coding; b) topic-guide-technique, where a list of topics is prepared beforehand, while moderators are free to formulate questions of their own.

#	**Number of focus groups**	3–6 focus groups, saturation rule is applied.	Acknowledge people's availability.
	Number of participants	4–12 (fewer, if focus groups are conducted online) depending on the topic; smaller groups, if emotionally charged topics are to be discussed; larger groups if more neutral and general topics are on the agenda.	The more participants are included, the more challenging it is to include them all and unravel their perspectives.
	Duration of focus groups	1–5h, depending on availability of participants; shorter if professionals are included.	

3.3.2. Preparation

Sampling: Sampling participants requires preparatory work to avoid reinforcing existing power relations (Skop 2006). The selection of participants and the composition of focus groups should be based on the research question and social and demographic characteristics of the target group (e.g. age, gender, mother tongue, ethnicity, social class) (Knodel 1993, cit. after Skop 2006). Segmentation – the creation of groups consisting of particular categories of people – may foster the security of the group and the participation of group members. Moreover, ensuring that participants are similar to one another may facilitate discussion (Morgan 1996; Lloyd-Evans 2006; Skop 2006). To facilitate participation itself, the different schedules of potential participants should be considered; for example a focus group could be organised in the evening of a day of bad weather to include people employed in agriculture, while an important leisure event, such as a football match, could be taken into account (Lloyd-Evans 2006).

Infobox 6: Reducing uncertainties

Because the focus group tool may be an unfamiliar experience for some, pre-focus group interviews and pre-screening questionnaires or exercises may be helpful to explain the project and get to know more about participants. These also help participants to structure their thoughts beforehand, which may foster their aeloquience during the discussion.

Locality: When determining the location of the focus group, researchers should be aware of practicalities, e.g. the acoustics in the room and whether it is accessible to all participants (especially those living in peripheral locations who have no access to individual transport), as well as the symbolic meaning attached to the locality (Gailing and Naumann 2019).

3.3.3. Implementation

Following Benighaus and Benighaus (2012, referring to Krueger and Casey 2008), focus group management can be divided into five phases:

First Phase – Introduction: The moderator welcomes participants and presents her/himself. (S)he explains the topic and aims of the discussion, provides information (for example, about who is sponsoring the project, data protection and processing, and naming rules for the discussion).

Second Phase – First-Person-Perspective ('I'): Incorporating an introductory question, participants present themselves.

Third Phase – Group-Perspective ('We'): Incorporating their practical or occupational background, participants' experiences in relation to the topic are collected.

Fourth Phase – Main Questions ('It'): the main questions are discussed in order, from general to specific.

Fifth Phase – Conclusions: The moderator sums up the most important aspects of the discussion and the participants are allowed to amend them. After resolving unanswered points and dealing with formalities, the group is drawn to a close and the participants go home.

Infobox 7: Focus groups as safe spaces, the example of MURAL tool

Apps such as MURAL, MIRO or FLINGA boards can be used to work efficiently in online focus groups, and technical devices and assistive apps can engage participants in online discussion formats. For example, MURAL boards offer participants the chance to include photographs of their life-worlds in rural areas: they are invited to pin them on a board, and discussions follow from this. Moreover, such tools foster the collaboration of all participants in real-time, which can be used for brainstorming activities (of things such as confirming what integration support infrastructure is available in the municipality or region), as well as for the subsequent joint clustering of the information collected. MURAL also offers the option of including online sociometry: focus group participants can position their chosen avatar on a scale and express their consent/sympathy or antipathy/opposition to pre-defined statements (e.g. 'I have easily made contact with the local population.') They can also use it to rate the importance of particular measures. Visual life voting tools such as MENTIMETER can be used at the beginning of a focus group to stimulate discussion, by asking, for example, 'How comfortable do you feel in the region of…?'

FLINGA boards can also be used for joint brainstorming activities and the joint collection of ideas and information. Finally, networking and video conference tools such as ZOOM and online collaboration apps (such as MURAL or MIRO) not only support online focus group discussions but also provide a safe space for vulnerable groups like female migrants and refugees to meet, talk to each other and express experiences and feelings in a room with other participants from similar backgrounds.

Fig 3: MURAL Board, own graphic C. Lobnig, H. Groicher, M. Gruber
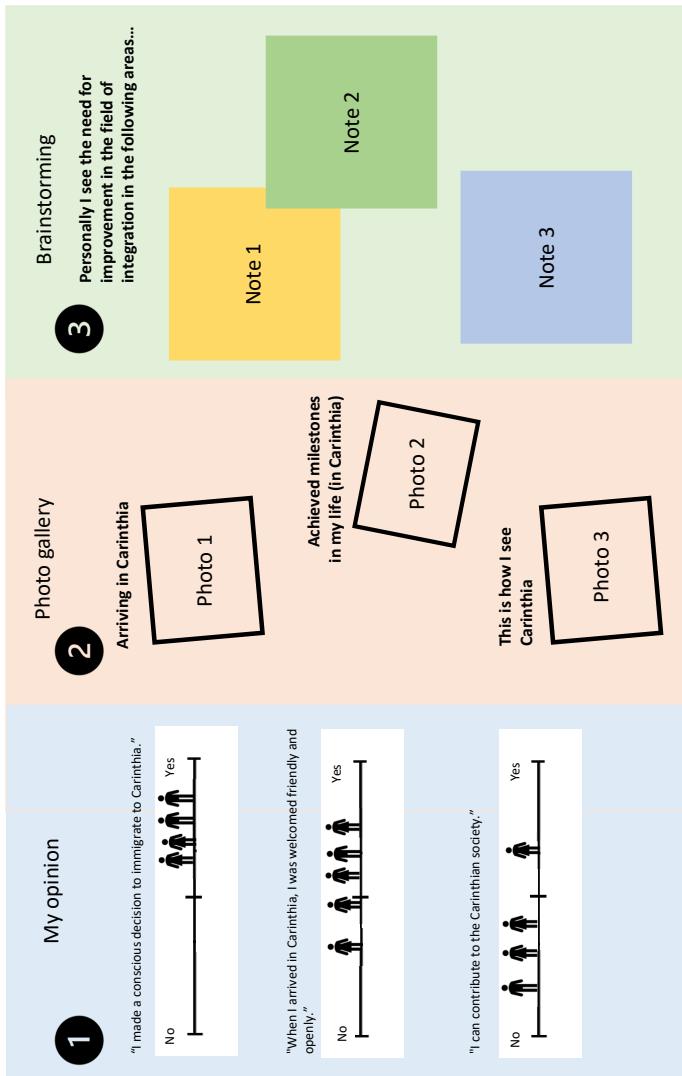
3.4. Open Space Technology (OST) and participatory workshop

3.4.1. Facts and figures

Definition and application: Open Space or Open Space Technology (OST) is a method designed for organising and running large group workshops or conferences with 500–1000 participants. Participants are invited to discuss challenges or a specific problem by setting their own agenda for the event (Owen 1997). A prerequisite for the successful application of the Open Space Technology, also known as the 'method of the big coffee break' (Baumann and Detlefsen 2005, 249), is to conceive 'Open Space' literally by ensuring that participants are not faced with too many constraints during the event. Such constraints might consist of an extensive and imposed official agenda, hindering the open expression and exchange of ideas, objections or propositions. Topics for including participants during those events should relate to each other, allowing participants to approach them from different points of view while aiming for constructive and viable solutions.

+ *Advantages:* One of the main benefits of using OST is that it is a relatively cheap and unconventional opportunity to organise large group events while also promising quick results by inviting diverse participants to take responsibility and join in the decision-making process. Open Space can contribute to an empowering atmosphere in which people can articulate their intrinsic motivations and natural points of view of the topic under discussion in a productive manner (Owen 2008). It can also facilitate interaction between the participants by inviting them to collaborate and solve problems on their own terms, by organising themselves into different groups which deal with certain aspects of the main theme. Allocating the responsibility to participants can ensure the sustainability of a project since it helps make them aware of the fact that the results of the event have not been dictated by the organisers but elaborated by themselves. Overall, using OST promises quick and sustainable results, which makes it especially attractive not only for the exploration phase of a project, but also for the transformation phase.

− *Disadvantages:* The advantages listed above depend on the character of the people involved. Open discussion formats like Open Space tend to favour the engagement of extrovert people who

flourish in this sort of socially dynamic environments, whereas introverted people tend to have problems taking the initiative in these informal settings. Consequently, the ideas and perspectives of extroverted people may be overrepresented while those of introverted people, who flourish in more formal settings, may be underrepresented. Although this could be counteracted by the law of two feet during the group discussions, it does not apply to the preceding drafting phase, in which groups are formed by group leaders who take the initiative by stepping forward to present their own group topic. Finally, while OST might be suitable for the exploration phase of projects, it is somewhat problematic when it comes to improving already existing and working projects, since the discussions often produce radically new ideas and stir up new expectations instead of delivering incremental refinements and corrections. When using OST for research purposes, this loss of control over the discussion could be counteracted by asking pre-prepared questions on the subjects that originally interested the researcher (cf. Freitag 2009).

Standardisation: OST relies on the individual motivations of each participant, which is why no strict guidelines can be formulated. However, in his books *Brief User's Guide* (1992) and *Open Space Technology – A User's guide* (1997), Owen started to formulate general principles for Open Space Events and proposals for how to approach them as a moderator. There is also an active community of practitioners who are exchanging their experiences and thus continuously developing the technology (https://openspaceworl d.org/wp2/oslist/). Experts in the field describe the process of running an event as intuitively reacting to the way the event is unfolding (Owen 2008).

Level of moderator involvement: During an OST event, the tone is dictated by the participants, not by the moderator. Except at the beginning, when the moderator introduces herself/himself to the group, a moderator's task is to facilitate the discussions by focusing only on maintaining the right (suitable and safe) atmosphere (Owen 2008). (S)he achieves this by providing the right spatial arrangements but not intervening thematically, because the aim is to uphold the principle of participant's self-organisation and empowerment. A moderator's final task is to close the event by moderating the final discussion (Owen 2008).

#	**Number of OST**	Depends on the number of people who consider a topic important enough to discuss.	Acknowledge the availability of people, especially experts in small-scale settings, e.g. rural areas.
	Number of participants	In its original form 50-100, but is also possible with smaller (<50) and larger groups (>1000).	
	Duration of OST	Half a day up to three day long workshops.	In general, one principle of OST is that every group session goes on as long as each participant considers it to be worth her or his time. Practitioners, however, calculate with time slots of one or one and a half hours.

3.4.2. Preparation

The only way to create a sample is by looking at which groups and institutions might be interested in the main theme of the Open Space event. However, this impact is limited since 'voluntary self-selection is the absolute sine qua non for participation in an Open Space event' (Owen 2008, 26). The main theme of the event should be carefully selected and introduced by choosing a topic that is both controversial and urgent, and sketching it out briefly and concisely in the invitation (ibid., 30f., Herman n.d.). This indirect influence on the composition and number of participants may run the risk of undermining the pre-prepared research issue as well as reducing the representativeness of the self-selected group with regards to other parties concerned with the main theme (Freitag 2009). In the preparation phase, organisers must also reflect on the spatial scale of an OST. If a medium-sized or small town is concerned, it might be an option to focus on selected districts.

3.4.3. Implementation

The actual event usually starts with a short introduction by the person responsible for the event, who initiated this mode of group discussion, and who is often a state official or manager of an organisation (Owen 2008). Following this segment, the moderator starts to open the space by pacing

up and down the room, making eye contact with the participants, and giving a brief description of the method.

The main motive of OST is not to gather qualitative empirical data in a narrow sense, even though the processes of self-organised group discussions and decision-making offer opportunities for subsequent analysis and interpretation (cf. Freitag 2009). The following processes and tools should be considered after opening up the room (Owen 2008):

Bulletin Board: At the beginning, each participant is invited to step into the middle of the room to propose a specific issue related to the main theme, which in her/his opinion is worth discussing further, by saying: 'My name is (…), my issue is (…)'. This makes that person responsible for the topic they have proposed, and for determining the time and place for the group discussion on the bulletin board.

Market Place: When the bulletin board has been filled with the various topics taken on by participants, the entire group is asked to sign up for all the different group sessions they are interested in.

Group Sessions: The way a group session runs depends on size of the group and its participants. The principle of self-organisation reoccurs in this dynamic group setting, since each group can freely choose how to run the session (Owen and Stadler 1999). Furthermore, the principle of 'the law of two feet' allows each member of the group to leave the discussion, if (s)he neither feels able to contribute to the discussion nor that (s)he is profiting from the conversations taking place. The moderator's task during the group sessions is to prevent interventions and to maintain the open space by ensuring an environment which allows for fruitful discussions.

World Café: This is another open format suited to facilitating group discussions in an empowering atmosphere, and shares several similarities with OST. World Café events can be held with anywhere from twelve to 12,000 participants (Nanz and Fritsche 2012). The all-encompassing belief of World Café that 'we humans want to talk together about things that matter to us' (Brown and Isaacs 2005) leads to the conclusion that this impulse should be utilised by acquiring shared knowledge or collective wisdom that fosters the creation of solutions and initiates change (Brown and Isaacs 2005). Like OST, the World Café method is especially

useful in the exploration phase of projects where a roadmap hasn't yet been laid out. Dittrich-Brauner et al. (2013) also recommend applying the World Café method immediately after presentations for people to reflect on their own opinions and ideas about the subject of the talk (ibid.). In general, hosting World Cafés requires relatively little logistical effort, apart from arranging the right setting by recreating a Café atmosphere and bringing people together. The former is achieved by arranging smaller tables around which chairs for four to six people are placed (Nanz and Fritsche 2012). At the first, spontaneous, World Café which took place in January 1995, practitioners began the practice of sometimes using (easel) paper as tablecloths on which participants could write or illustrate their ideas and thoughts (Brown and Isaacs 2005). World Café events usually start with all participants entering the room together and taking a seat at one of the pre-arranged tables (Dittrich-Brauner et al. 2013). The moderator is then required to introduce the event's theme or main questions, and then the participants begin group discussions (ibid.). As during OST events, one person in the group – 'the host' – takes responsibility by staying at the table and reporting to newcomers the findings of the discussions at her or his table up to this point (cf. Nanz and Fritsche 2012). The remaining members of the group, however, are supposed to change tables at the end of each 20-30 minute session (ibid.). After several rounds, the moderator's task is to gather and present the results from the different tables, for example by exhibiting the tablecloths, using post-it notes for central points, creating an idea cluster, telling a detailed story or engaging a professional illustrator (The World Café Community 2002 cit. after Dittrich-Brauner et al. 2013). Löhr et al. (2020) suggest that café hosts and moderators also take additional notes during the sessions at the tables. However, this is very resource-intensive.

Maintaining an open and plural democratic society, where diversity is addressed actively and productively is explicitly taken into account by the tool 'village talks' (Dorfgespräche, Wenzel and Bieser-Schnebel 2019). Village talks, aim first of all to establish a dialogue format to initiate interaction between all the members of local communities. A second aim is to initiate a local development process. The concept involves three steps, split into three evening events that take place consecutively: 1) establishing personal encounters by drawing on new places and means of communication; 2) ini-

tiating productive confrontations about (non-)shared values and existing conflicts; and 3) consolidating joint action.
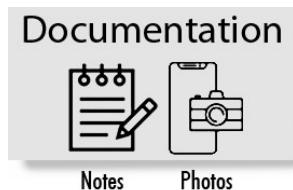
3.5. Observation

3.5.1. Facts and figures

Definition and application: As an ethnographic method that has become popular in many fields of the social sciences, observation can be generally defined as 'the systematic description of events, behaviours, and artefacts in the social setting chosen for study' (Marshall and Rossman 1989, 79). It therefore consists of recording all perceptible sensory aspects of human action and reaction not initiated by researchers (Thierbach and Petschick 2014). It is important to distinguish between observation with a scientific purpose and everyday observation (Driscoll 2011). While everyday observation can also initiate orientation and gather information about a locality, it does not have a primary scientific purpose or follow scientific principles such as repeatability or intersubjective traceability (Atteslander 2008; Watson and Till 2010). By means of scientific observation, researchers may become familiar with a locality. This sort of observation can also include everyday techniques like reading the newspaper or more quantitatively-oriented observations like conducting a traffic census. In cultural anthropology, participant observation includes the researcher's participation 'in the daily activities, ritual, interactions, and events of a group of people as one of the means of learning both the explicit and tacit aspects of their life routines and culture' (Musante 2015, 251).

Level of moderator involvement: Depending on the level of involvement of the researcher, observation can be divided into three or four types (Bernard 2006, Mattissek et al. 2013, cited after Gold 1958, 219-221). First, the researcher is completely immersed in the field and their own role as an observer is (almost) invisible (*complete participant*). Second, the researcher participates widely in the field, but their role as an observer is either overt or communicated explicitly (*participant-as-observant*). Third, the observation is given priority over the participation and a low level of moderator integration and identification is characteristic (*observer-as-participant*). Fourth, the moderator remains uninvolved in actions and events and remains at a distance from the field, for example by video recording (*complete observer*). According to Mattissek et al. (2013), only the first two types can be defined as participant observation in the strictest sense, while the last two types are non-participatory observation. Observation can be carried out by the researcher her/himself (internal) or by another

person (external) who is not familiar with central objectives of the study. A combination of both internal and external observation can also be a useful way of collecting data and encourages a reflexive attitude (Weischer and Gehrau 2017).

+ *Advantages:* Observation takes place in people's everyday environments and not in a laboratory setting. The aim is that the presence of the observers should not modify their actions (Mattissek et al. 2013). According to Spittler (2001), observation allows researchers to grasp complex issues at a glance, which might otherwise be expressed in a long-winded way. While qualitative interviews are mostly done only once and are relatively short, (participant) observation is better for long-term and in-depth understanding of practices and situations (Mattissek et al. 2013). Therefore, '[w]hen you want to know what people actually do, (…) there is no substitute for watching them or studying the physical traces their behaviour leaves behind' (Bernard 2006, 413).

— *Disadvantages:* Contrary to what is often assumed, observation is not objective, but always subjective and selective. Thus, research results are part of a process of socio-spatial construction. Especially in an unfamiliar context, observers will be particularly attentive to begin with and will focus on many aspects, which they assume to be 'new'. When things become more familiar, their attention will decrease (Mattissek et al. 2013). As a consequence, researchers doing participant observation find themselves in an ongoing dilemma. On the one hand, they have to be interested in being integrated into the field and becoming more familiar with situations but on the other hand they also have to keep their distance (Mattissek et al. 2013, cited after Lüders 2010). This dilemma needs continual self-reflection. Finally, observation takes up a lot of time and is often considered to be less effective compared with interviews (Spittler 2001). It can therefore be useful (and is recommended) to combine observation with qualitative interviews.

Standardisation: Depending on the level of moderator involvement, observation can be structured or unstructured (Mattissek et al. 2013). Structured observation focuses on selected aspects of the field, for the 'purpose of quantification' (Lamnek 2010, 508) and schemes and categories for data

collection and analysis are therefore defined beforehand (Flick 2009; Mattissek et al. 2013). The level of standardisation can be increased by developing observation guidelines. Unstructured observation does not follow a standardised scheme. Rather, it is open to new structures, processes, situations and interpretation during the observation (ibid.). Nevertheless, unstructured observation is also conducted in a systematic way and is in no way arbitrary or random; it is planned, recorded and later analysed (Mattissek et al. 2013, cited after Lamnek 2010). Moreover, it is important to note that – for ethical reasons – observation must be transparent and should not be conducted in a covert way (Legewie 1991; Bernard 2006). In most cases, a mixed form is used, in which the people being studied are told about the scientific observation but don't know its exact purpose (Mattissek et al. 2013).

#	Number of observations	Depends on the breadth of the topic and whether an observation is focused or takes place over a longer period of time.
	Number of participants	Not possible to define.
	Duration of observation	From an hour to half a day.

3.5.2. Preparation

During the exploratory phase of a wider evaluation or assessment activity, almost everything, from material issues to social interaction can be observed until saturation is achieved; in any other case, a concrete human interaction to observe must be chosen (Ostrower 1998) and observers have to identify a suitable research area and position within this given scenery (Mattissek et al. 2013). During participant observation, it is crucial to get access to the field of interest, mostly via *gatekeepers*, people who are widely accepted in the group and not outsiders (see reflections on access in chapter two, section 2.1.). In the course of the observation, moreover, ethical issues must be considered (e.g. not eavesdropping on people´s conversations). A common understanding of how to record field notes after the observation must also be developed, covering such things as what to record (material conditions, social interac-

tions etc.) and the level of detail the notes should contain. It is also good practice to record open questions that arise during the observation.

3.5.3. Implementation

Following Spradley (1980), observation is carried out in three phases: *Descriptive observation, focused observation* and *selective observation.* As soon as access to the research field is complete, observers start to take notes. In the first phase, researchers orient themselves in the field and describe situations and actions in a relatively unstructured way. The aim is to catch the complexity of the field and to clearly define the research questions. In the second phase, the only observations noted are those that go well with the processes and problems of interest. The third phase validates the observed processes and patterns and more selectively gathers examples of central interest.

Considering the fact that the observer influences the field simply by being present, the observation should be accompanied by a continuous process of self-reflection. This performativity must be acknowledged from the very beginning. One has to assume that individuals might change or adapt their behaviour simply because unknown people are present.
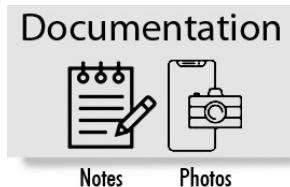
3.6. Mobility mapping

3.6.1. Facts and figures

Definition and application: Mobility mapping is a spatio-visual tool useful for the investigation of the spatial dimension of everyday life of individuals or groups, and for quantitatively and qualitatively capturing both the meanings attached to places and spatial (im)mobility (Kordel et al. 2018). Individuals or groups are invited to draw maps of places that are personally important to them and which they may or may not frequent, as well as the means of transport they use to get there. This captures their perceptions and experiences of the distance to and (in)accessibility of particular places (Kumar 2002; Weidinger et al. 2019). If combined with narrative interviews (see also narrative mapping, Lutz et al. 2003; Täubig 2009), mobility mapping also offers the opportunity to grasp information about the purposes, preferences and frequency of people's travel as well as the meanings they attach to places. Mobility mapping is mostly applied at a later stage of the research and evaluation process, when a specific group has been identified, whose (im)mobility patterns are of interest to researchers (Kumar 2007).

+   *Advantages:* Mobility mapping offers valuable insights into the (im)mobility patterns of a group or individual. Participants are encouraged to think about their life worlds, initiating a process of reflection. Due to its visual character, it is less dependent on participants' language and literacy and thus fosters their power to recall and structure information. It also stimulates interaction and discussion between the participant and the researcher and even allows for joint analysis during the interview. Finally, spatial (im)mobility and related experiences of exclusion and inclusion can be compared according to variables such as age, gender or household composition to identify commonalities and differences in mobility patterns (Weidinger et al. 2019, 17). Thus, mobility mapping addresses core challenges in rural and mountain areas.

−   *Disadvantages:* Mobility mapping is very resource-intensive and time-consuming. It may be difficult to implement with participants who have only recently moved to their place of residence, with those who are not used to open forms of interviewing and drawing exercises and those who are not confident about their ability to draw and write (Weidinger et al. 2019). Moreover, at

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least two members of the research team (e.g. one researcher and one assistant) are needed to instigate mobility mapping.

Standardisation: To foster intersubjective traceability, the researcher should standardise the colours and shapes of cards used during mobility mapping (Kordel et al. 2018). In order to facilitate and accelerate the process, pictograms representing important places could be prepared. Too strict instructions on how to complete the mapping, however, could lead to a neglect of subjective encounters (Pretty et al. 1995; Weidinger et al. 2019, 8).

Level of moderator involvement: The role of the researcher is to motivate participants to draw or write for themselves. If they hesitate, they should be reassured that scale-based drawing, completeness, aesthetic and orthography do not matter (Kordel et al. 2018). Only if specifically requested by participants can researchers 'take back the pen' from the participant and write or draw under their guidance (Kordel et al. 2018).

#	Number of mobility mappings	Depends on the research aim; saturation rule is applied.	Acknowledge the availability of people, especially experts, in small-scale settings, e.g. rural areas.
(people icon)	Number of participants	Ideally one per interview.	If more than one participant is present: capture different experiences, e.g. of members of one household or an association.
(timer icon)	Duration of mobility mapping	45 to 180 minutes.	

3.6.2. Preparation

Sampling: Depending on the aim of the study, either a supposedly homogenous or a rather heterogeneous group may by chosen, while different sampling strategies should be applied. A mobility mapping should be carried out with either a single person or a family.

Locality: Appropriate locations should feature a big table or have enough space to work on the floor.
Ex ante-exercises: The research team should do some background checks on the investigation site, e.g. its structures, places and actors. They need

to prepare small cards of different shapes for the places the participants may or may not frequent with pictograms that show different realms of everyday life (such as shopping, visits to the authorities or services, free time), different colored marker pens for different modes of transport and prompt cards for the respective pictograms and short written explanations. For reasons of inclusivity, the latter should be provided in all the relevant languages spoken by participants. Finally, the researchers need to set out fixed roles and responsibilities beforehand; for example, one person to ask questions (interviewer), a second to take notes (note taker), and a third to provide participants with materials.

3.6.3. Implementation

Introduction: At the beginning, the interviewer explains that (s)he wants to learn about participants' everyday lives and (im)mobility practices and how the method works. Those who hesitate to draw and write for themselves are encouraged to do so, but also reassured that help is available at any stage if they need it (for example, with the 'correct' spelling of place names (Weidinger et al. 2019).

Implementation: Participants are invited to draw their apartments, houses or accommodation at the very centre of the poster. They are then asked to talk about the places they usually visit in their everyday lives. Once the participants have started to narrate or write/draw the small cards, they are not interrupted until they stop. When they have finished, they should be asked to clarify or add places they have mentioned but have neither written about nor drawn. The prompt cards with pictograms and short explanations of different realms of everyday life serve as reminders. In a subsequent step, participants arrange the small cards with the places visited around the apartment/house/accommodation according to their perceived distance from home. Then, if the participant is happy with the arrangement, the small cards are glued onto the poster.

Afterwards, participants are asked to draw lines between their home and the places they visit, indicating the means of transport they use to reach each place. For the different modes of transport (on foot, by bicycle, public transport or long-distance bus service, or in a car, whether they drive it themselves or are driven by someone else), different coloured marker pens are used. If they have not already done so, the interviewer encourages the

participant to explain the meaning of the places drawn, including their reasons for going there, what goes on there, the duration and frequency of visits, who accompanies them, and the modes of transport they use to get there (Weidinger et al. 2019).

After that, the participants are invited to draw or write on differently shaped small cards places where they must, but do not want to go, as well as places they never frequent for various reasons. Reasons may include the inaccessibility of a place due to the cost in time or financial resources, legal issues or health constraints, negative representations or experiences of places due to discrimination or racism, which indicate exclusion processes (Gifford et al. 2007; Täubig 2009; Weidinger et al. 2019). Finally, these cards are also fixed on to the poster.

Fig. 4: Mobility mapping, own illustration S. Kordel and T. Weidinger
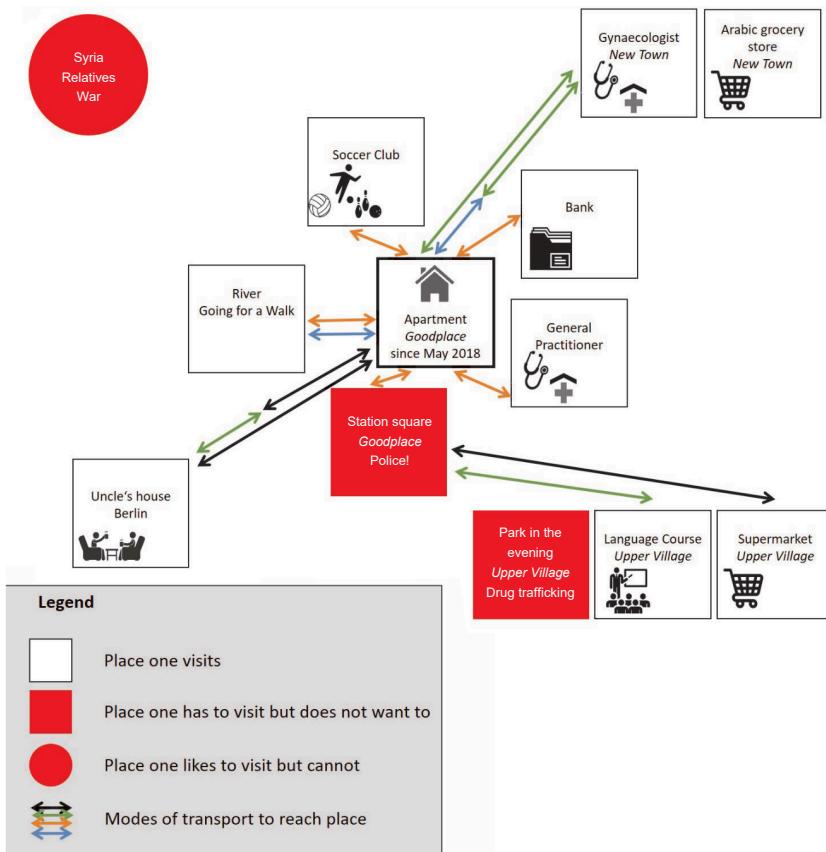
Conclusion: To bring the mapping to a close, a balance can be drawn up. At the end, a picture of the final version of the map is taken by the interviewer and the map is handed over to the participant.
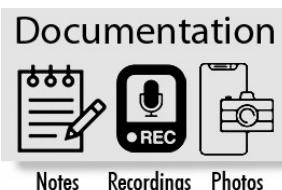
3.7. Social mapping

3.7.1. Facts and figures

Definition and application: The process of social mapping 'seeks to explore the spatial dimensions of people's realities' (Kumar 2007, 54), while (infra)structures and stakeholders are of peculiar interest when it comes to the assessment of the social inclusion of specific groups (Manahl 2023). The scale is not fixed by researchers, since local people are given autonomy to decide what is most relevant and important to them (Kumar 2007; Ferguson and Heinz 2014). Social mapping is best carried out at the beginning of the appraisal and can provide useful information for future steps in the research process (Callens 2002). Besides, the application of social maps is suitable for participatory situational analyses, needs surveys and planning and evaluation processes, as well as for research questions which aim to find out how people perceive their life worlds, their relationships within the community, their access to resources and their agency (Kumar 2002 cit. after Gangarova and von Unger 2020). Moreover, through the process of drawing and talking, social maps allow participants to move from description to depiction to theorising the reasons for the ways in which they have represented features on the map (Emmel 2008). The map is therefore not an end in itself, but is rather a tool for gathering information and can work as an 'ice-breaking' element (Kumar 2007). Social maps can also be applied to identifying diachronic dynamics in a given social setting. That is to say, they can be used to grasp changes in social networks and the different positions within them. To achieve this, social maps must be created at different points in time.

＋ *Advantages:* Social mapping has the advantage of being able to depict visually a variety of individual information about a specific place. Within the process of gathering information, a more and more complete image of the place is created. It is also possible for participants to join later, discuss and add representations to the map. The composition of the group does not play a decisive role, as long as there are enough different perspectives represented (cf. Schönhuth and Jerrentrup 2019). Besides accessing participants' life-worlds, the method can also promote and support communities, for example by contributing to processes of community-building (von Unger 2014). Finally, social maps can be combined

with other methods (such as wealth ranking or Venn diagrams) for further in-depth analysis (Callens 2002; Kumar 2007).

— *Disadvantages:* Hand-drawn maps allow for great flexibility but are not always directly intelligible to external users. In choosing methods, it is necessary to clarify methodological priorities: is it the mapping process, in which the participants' subjective views are expressed in a simplified manner, or the map itself, which is also immediately intelligible to outsiders and clearly communicates particular content (cf. von Unger 2014)? Kumar (2007) points out that the process of social mapping also needs a certain level of confidence.

Standardisation: Making social maps should include at least two researchers/facilitators, one moderator and one note-taker.

Level of moderator involvement: Within the process of mapping, the moderator should keep an eye on the extent to which different groups participate. In particular, marginalised communities should not be excluded, but should be motivated to contribute to the process (cf. Kumar 2007). Throughout the entire process, researchers should take care to ensure that once somebody has given an oral or drawn statement, other participants are invited to comment, agree, disagree or add something. In order to ensure that participants understand this tool, a simple example can be generated at the very beginning (Sontheimer et al. 1999)

#	Number of social maps	Depends on the topic and the place under study, saturation rule is applied.	
	Number of participants	Ideally one per interview.	If more than one participant is present, ask the group to nominate one person to draw the map at the outset.
	Duration of social mapping	1–2,5 hours, depending on the level of detail.	

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3.7.2. Preparation

Sampling: According to Kumar (2007), for contextualisation and further interpretation it may be helpful to characterise the people participating in the process of social mapping, for example in terms of their socio-economic background, gender, occupation etc. (ibid.). At the same time, ethical issues must be considered. Poverty and disease, may go hand in hand with social stigma for instance, and to be described as 'poor' can cause hesitation about participating (Callens 2002). Alternatively, the exercise can be done with a few key informants who know the location well. In this case, researchers should reflect on the selection of key informants, as they most likely belong to the better-off group (ibid).

Locality: Selecting a location for social mapping can be seen as crucial for achieving its purpose. The required number of participants should be present at the site selected, which should be a central place accessible for all members of community. Moreover, it should be comfortable and potential external influences such as weather or noise should be considered (cf. Kumar 2007).

Ex ante-exercises: The moderator should tell participants about the mapping process before it begins. The explanation should include the objectives of the study, the research question and a brief description of what is expected of them. The moderator should allow the participants to take their time making the drawings and explain them. He or she also should inform them about the amount of time they will have to commit to the study (cf. Emmel 2008). Field visits and observation prior to carrying out the mapping can help to sensitise researchers to relevant (infra)structures and stakeholders, and can help them structure the exercise, for example by preparing small cards containing icons or symbols (Manahl 2023).

3.7.3. Implementation

Taking into account the above preconditions, the process of social mapping follows several steps, as pointed out by Kumar (2002, 54, 56) and Ferguson and Heinz (2014). It is important to mention that the implementation and documentation of social mapping are closely intertwined (see also chapter 3.4).

1. a suitable location and time scale for the exercise should be selected and appropriate materials identified. It is important to ensure that all members of the community can access the location, and have enough time to do so. Local people should be consulted about these issues and later invited to the event.
2. the purpose of the tool should be explained to the participants. To begin with, participants should be asked to draw the main physical features of their locality.
3. the moderator should stay alert, watching and listening closely to the discussion and drawing process. Meanwhile, the note-taker should take detailed notes.
4. the moderator should let the discussion flow and show that (s)he has faith in the participants, who should have total control and be encouraged to take the initiative.
5. the moderator should take care to ensure the participation of every section of the community and take proactive steps to involve anyone left out.
6. the moderator should keep in mind that her/his role is limited to facilitating the process. Therefore, she or he should only intervene when necessary, for example when the interaction between the participants is tense.
7. the moderator should propose clarifications or additions unobtrusively, by asking questions such as 'what about…?', or 'what does this symbol represent?'
8. for orientation, when the mapping has finished, some participants should be asked to identify their own houses on the map.
9. depending on the specific purpose of the exercise, participants should be asked to provide details of their households.

As with the suggested implementation for mobility mapping, Manahl (2023) allocated 2–3 researchers to the role of organising social mapping.

Social Network Analysis

As social mapping addresses the material and social aspects of social life (Kumar 2002), it can be easily combined with social network analysis. A social network can be understood 'as a specific set of linkages among a defined set of persons, with the additional property that the characteristics of these linkages as a whole may be used to interpret the social behaviour of the persons involved' (Mitchell 1969, 2). Networks consist of *nodes* (e.g. individuals, collective actors) and their relations to each other (*ties*), of friendship, conflict and so on (Gamper 2020). The main aim of a network analysis is to describe actors and their relationships and to make causal statements about the effects of relationships on actors – or vice versa. Network analyses can be divided into two main groups: (1) egocentric networks and (2) and overall network analysis. The former describes the interpersonal networking of a particular actor. This subject-centred network consists of the relationships of the interviewed actor (ego) to other actors in their network, the so-called alteri, to which they relate. It is also possible to ask ego about relations between the alteri. An overall network analysis considers nodes and their ties within predefined limits, while its focus is on the internal networking of the actors in a certain area (ibid.). Thus, the main research focus is on a certain number of actors and their very specific relationships (Jansen 2006). As in social mapping, since many local actors are involved, overall network analysis can be a valuable supplement.

Moreover, social network analysis can be either quantitative or qualitative – or a combination of both. In standardised network research, statistical descriptions of structure or causal relationships are of interest (Gamper 2020) and include the use of parameters such as network size, centrality, heterogeneity and density (Wasserman and Faust 1994; Scott 1988; Jansen 2006). Qualitative network analysis investigates the 'stories' behind interpersonal relations and seeks to understand mechanisms and contexts (Gamper 2020). Thus, for deconstructing the development of networks or dynamic changes in them, people's stories and the possibilities for action in their respective contexts must be understood (Schweizer 1996, White 2008).

A narrative stimulus represents a starting point for network analysis, while the participant draws her/his individual network on a blank sheet of paper or reconstructs it using a software program (e.g. VennMaker) afterwards. The subjective ascription of meaning is done through the interviewed person (cf. Gamper 2020).

3.8. Participatory photo/video talk

3.8.1. Facts and figures

Definition and application: Participatory photo/video talk describes the use of visual material such as photos or videos for empirical research. Developed from anthropological documentaries and sociological record keeping, it involves 'inserting a photograph into a research interview' (Harper 2002, 13). The subjective interpretation of visual artefacts is a key part of visual methods and pictures are commonly understood as representations, 'showing not what was but how things were seen' (Rose 2008, 152). Finally, a collective interpretation and process of negotiation about the meanings of photos or videos may draw on a participatory process. In terms of participatory photography, 'graphical records of local histories, experiences and agency created by photographers have been powerful in eliciting understanding and empathy among academic and public audience' (Cubas 2020, 270).

Visual methods such as photo or video talks can be designed for various purposes, target groups and for varying degrees of participation. The following list provides an overview of four key tools evolved from different sub-disciplines of the social sciences. Although most of them were initially designed for photographs, videos can easily be included, too, if necessary.

Photo-elicitation is a combination of photography and interview, which has its roots in ethnology and sociology (Harper 2002). The photo itself is taken by the interviewer and is subsequently discussed together with the participants. If the aim is to depict collective representations, the tool can also be used with small groups.

Auto-driving, derived from psychology, aims to take photos of individuals in everyday life situations over a certain period of time. Photos are taken by the researcher, too, while a diachronic perspective is used in order to identify changes in behaviour.

When applying *photo-novella* (photo-voice), the participant is involved in taking photos or producing videos. She or he is documenting her/his life-world, also over a certain period of time. The roots of this method can be found in ethnology.

Reflexive photography makes use of participant-generated visual data. Here, reflexivity is achieved twice over: first when the photo is taken and secondly when the content of the photo is put into context during the interview. Referring back to participant-generated photography enables the researcher to trace the discursive negotiation of meanings (Kordel 2015).

+ *Advantages:* Visual methods provide the opportunity to grasp the meanings individuals and groups attach to places and their social contexts. Inserting photos or videos appeals to all the senses and actively taking photos can be a stimulus for further discussion. Respondent-generated photographs, in particular, enable the researcher to acknowledge individuals' perspectives when 'viewers attribute new meaning through their own cultural experience' (Edwards 1992, 8). During the interviews, photography becomes a communicative bridge between the interviewer and the participant 'that can lead into unfamiliar, unforeseen environments and subjects' (Collier and Collier 1986, 99; Kordel 2016).

– *Disadvantages:* Visual methods need time, personnel and material resources as well as proper preparation. Challenges include the different levels of experience of participants with technical preconditions, as well as logistical issues.

Standardisation: On the one hand, a certain degree of openness, for instance, about which objects participants should photograph, is crucial for visual methods. On the other hand, in order to achieve comparability, guiding questions and stimuli can be included, such as places that are important in everyday life, places you do not like, situations that are characteristic for the respective participant.

Level of moderator involvement: The researcher's role is firstly to introduce the method, including giving advice and explaining technical issues if photos/videos are to be taken by the participant. Secondly, she or he has to be accessible to answer further questions and respond to problems during the photo/video taking phase. Thirdly, the researcher has to organise and conduct the interview. During this phase, the moderator must ensure that the photos or videos to be discussed during the interview are available (either printed or displayed on a technical device). Although the interview

is itself directed mostly by the participant, interview guidelines help to control the progress and serve as an orientation.

#	**Number of participatory photo/video sessions**	Depends on the topic and place under study; saturation rule is applied.	
	Number of participants	Ideally one per interview.	If more than one participant is present: capture different experiences, e.g. those of members of one household or an association.
	Duration of participatory photo/video sessions	1–2,5 hours, depending on the level of detail; to reduce the length of interviews, the number of photos/videos can be reduced; these can be pre-selected jointly with the participants.	

3.8.2. Preparation

As suggested above, a clear introduction to the method should be given during an introductory meeting. It may be helpful to employ small cards with instructions stating what kinds of objects or situations participants should photograph, how many photos they should take and where. Furthermore, it should be pointed out that aesthetics are not important. Reassuring participants that it does not matter whether or not they are good photographers is another important issue closely interlinked with power relations (Kordel 2015). It is also important to decide what devices will be used for taking photos (whether this will be the participants' own cameras, cameras provided by the researchers, cameras on mobile devices or disposable cameras) and whether photos will be printed for the ensuing discussion. Regarding the latter, printed photos entail the opportunity for haptic experience during the interview, which may stimulate the discussion.

Infobox 8: Taking the right photo in an adequate light – the matter of locality

A decision about place has to be made twice: first, it is important to decide where photos/videos should be taken. Most commonly this will be participants' immediate living environments and the most important places in their everyday lives, such as their homes. This should be explained beforehand, since otherwise participants tend to show photographs taken during excursions or trips to (tourist) places to showcase their lifestyles (Kordel 2016). Secondly, the place where photos are to be discussed together with the participant must be selected carefully. Good light is particularly important when showing digital photos or videos, and a large table is necessary when printed photographs are to be used. Just as for qualitative interviews, researchers should consider the participant's preferences.

3.8.3. Implementation

In the interview itself, one could begin by asking about the participants' experiences of taking photos. This allows for an affective approach and can give the interviewer early insight into the evaluation of the method itself (for example, whether participants were satisfied or dissatisfied), and ultimately of the places visited. Regarding the incorporation of visual materials into an interview, Collier (2003, 245) emphasises the benefits of inserting a photograph at the very beginning of an interview. 'Apart from that, photographs can also be used as interventions within an interview, discussing problems from several points of view and finally as fixtures for one's daily life.' Despite Collier's (2001) beliefs about the importance of including photographs in sequence, it is assumed that this runs the risk of destroying the associative character of the interview (Kordel 2015). Thus, interviewees should be invited to talk about whichever pictures they want to, whenever they wish. As Kordel (2015) has shown, some participants actively refer to the photos during the interview. 'This was especially the case when they wanted to illustrate or give in-depth insights into narratives that had already been mentioned' (ibid. 36). In cases where participants do not use photos, the interviewer should intervene and encourage them to think of a concrete situation in relation to the content of a picture in order to stimulate further narratives. As in qualitative interviews, interviewers should be able to tolerate a certain amount of silence, and it may be helpful

to give receptive signals to maintain a pleasant atmosphere. When carrying out a visually stimulated interview, the researcher should always be aware that results are achieved through a combination of picture and text. Commonly, visual methods are audio-recorded and fully transcribed afterwards, while the insertion of visual materials is marked in the transcript. For a full reflection on audio interviews, see the section on qualitative interviews.
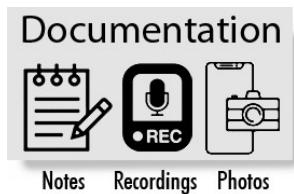
Further readings

Municipality profile:	Gruber 2013
Qualitative Interview:	Gubrium and Holstein 2002
Focus Group:	Lloyd-Evans 2006
OST:	Owen 2008
Observation:	Bernard 2006; Musante 2015
Mobility mapping:	Bagnoli 2009; Weidinger et al. 2019
Social mapping:	Manahl 2023
Participatory photo / video talk:	Rose 2008; Spencer 2011; Cubas 2020

4. Data analysis

4.1. General approach

In participatory research, participants should be constantly involved in the analyses. A joint interpretation may already have taken place during the interview stage, during which pictures or maps will have been analysed by the participants themselves (see 3). In other cases, a separate joint analysis of empirical data is undertaken after data collection (see 4.3). In general, a variety of established modes of analysis can be applied.

'Qualitative data analysis' can be used to evaluate qualitative data, including verbal/textual, visual or other non-numerical data. It is important that the collected data are not simply analysed at the discretion and interest of the individual researcher, but that the analysis is carried out interpretatively (hermeneutically) in relation to the previously defined research interest and questions. The aims of evaluation are to explore the research topic in more detail and to build hypotheses or theories. In qualitative social research, the interest in knowledge is thus primarily inductive and based on concrete empirical data. *Categorising methods of analysis* are very common in the evaluation of qualitative data. In this process, the collected material – interview transcripts, observation protocols or mobility maps, for example – is divided into meaningful units, including for instance individual paragraphs, sentences or even short phrases or words. These previously defined units of analysis are then assigned codes. This process is called '*coding*'. In a further step, categories are built, summarizing codes with similar, (inter)relating and contrasting meanings. Hence, categories are an aggregation of codes. After "clustering" codes into categories, which provide the basis for building superordinate themes and carrying out comparisons between the categories, patterns in the data compared can be identified and meaningful, logical connections between the categories drawn (Dey 2005; Lester et al. 2020).

Infobox 9: Coding process

The coding process can be 1) *deductive* – rule-governed and strictly aligned with the conceptual framework; or 2) *inductive* – derived directly from the text in an exploratory way; or 3) *a combination of both* – which is often applied in research practice.

1) In *deductive data analysis*, such as deductive category assignment in qualitative content analysis, categories are deducted from theory or previous research and defined a priori and then applied to the text. These categories do not change throughout the analysis, and text passages are only coded if they correspond to one of the (theoretical-ly derived) pre-defined categories (Mayring 2014, 97). In particular, large bodies of text can be processed in this way and the procedure is highly intersubjectively verifiable due to the high degree of structuring. However, deductive data analysis with the strict focus on literature-based categories can entail a loss of complexity and be perceived as insufficient in a more interpretative research paradigm (see e.g. Želinský 2019)

2) *Inductive coding* procedures are open and rather interpretative and aim for a holistic understanding of the situation. This should be ensured by a thoroughly, line by line, reading of the text material in order to capture the important contents. Based on the research questions, relevant aspects are identified and coded. Categories emerge from the empirical material (Azungah 2018, n.p.). The aim of inductive coding is to generate new theoretical concepts (Hecker and Sybing n.d.). The paradigm of *grounded theory* (Glaser and Strauss 1967) was established in the social sciences for this purpose and tries to 'discover' categories in by exploring the interview transcripts. Accordingly, the category system is generated through engagement with the text and by constantly comparing codes (Chametzky 2016). This procedure is time-consuming (Chandra and Shang 2017, 102) and is therefore particularly suitable for smaller bodies of text.

3) When *deductive and inductive data analysis methods are combined*, codebooks can be aligned from the theoretical-conceptual framework and subsequently compared and expanded from the textual data. Thus, code formation can be more flexible and can be adapted in particular ways depending on the findings.

When codes have been assigned to all the data to be analysed, they are grouped into superordinate *categories*. However, the collected data cannot be analysed in a category-building manner alone, but must also undergo *sequential analysis*. This focuses in particular on recording different process structures in the data (e.g. stations in a life course or migration processes). The evaluation of the collected data is first carried out on a *case-by-case basis*. This means that a single interview, focus group, participant observation or mobility map is worked through and coded in detail from beginning to end. In a subsequent step, *cross-case analysis* takes place. Here, individual cases (e.g. interviews) are compared with each other. Through this process, themes or types or even theories are formed (Yin 2003).

In addition to the selected method of evaluation, the empirical data can also be analysed with other methods (*triangulation*). Moreover, the data can also be analysed quantitatively (for the frequency of certain phenomena, for example) in addition to the qualitative (interpretative) analysis (*mixed methods* approach) (Mayring 2014).

There are various software programs to help with the analysis of qualitative data – including MAXQDA, ATLAS.ti or the open access software QCAmap, and to simplify both coding and further analysis (for example via filter codes, cluster codes to categories, visualising relations between different codes).

4.2. Data analysis methods

4.2.1 Thematic analysis

Definition and application: Thematic analysis is a method 'for identifying, analysing and reporting patterns (themes) within data' (Braun and Clarke 2006, 79). A theme represents some level of 'patterned response or meaning within the data set' (ibid., 82) that needs to be identified by the researcher in relation to the research question – either inductively or deductively, and on either a semantic (explicit) level or a latent (interpretative) level.

+ *Advantages:* The method is relatively easy to learn and thus of special interest to less experienced researchers (Kiger and Varpio 2020). Thematic analysis offers flexibility in terms of determining themes and prevalence, as well as the opportunity to analyse a big dataset (Braun and Clarke 2006; Kiger and Varpio 2020). It can

be used independently, regardless of the research methods, and can also be applied to existing data. It can provide rich thematic descriptions of the entire dataset or more detailed and nuanced accounts of particular themes or group of themes within the data, for example by taking a semantic approach (Braun and Clarke 2006, 83).

— *Disadvantages:* The focus of thematic analysis is on common or shared meanings, which means that it is less valuable for individual meanings or experiences, or single data items (Kiger and Varpio 2020). In addition, the flexibility mentioned as an advantage can also be a disadvantage. The differences between qualitative content analysis, (thematic) discourse analysis, grounded theory and thematic analysis are often unclear (for a comparison between qualitative content analysis and thematic analysis, see Vaismoradi and Snelgrove 2019). Accordingly, the theoretical and epistemological position of a thematic analysis needs to be made clear by the authors (Braun and Clarke 2006; Kiger and Varpio 2020).

Standardisation: Braun and Clarke (2006) differentiate the following approaches:

• Inductive or bottom-up – where themes are determined from the data (data driven, similar to grounded theory; research questions evolving through the coding process) or deductive – where preconceived themes are based on theory or existing knowledge (analyst driven, given research question).
• Semantic-explicit (explicit content of data) or latent-interpretative approach (including ideas, assumptions, conceptualisations and ideologies underlying the data).

Implementation: Similar to other methods such as grounded theory or discourse analysis, thematic analysis is divided into different phases, which are presented here following Braun and Clarke's (2006, 87) suggestion:

• *First phase: becoming familiar with the data*
During the first phase, data such as journal entries, field notes or photographs and videos should be prepared for analysis, while interviews, focus groups or recorded observations need to be transcribed. Afterwards, the data are read and re-read and notes are taken (Kiger and Varpio 2020).

- *Second phase: generating initial codes*
  In the second phase, interesting features of the data that are tied to more semantic or latent meanings are coded across the entire data – either manually or with software assistance – and data relevant to each code are gathered. Codes should not overlap and should fit within a larger coding framework or manual that may either be inductive or deductive (Kiger and Varpio 2020).
- *Third phase: searching for themes across the data*
  The third step includes narrowing down the number of codes and the grouping of codes into potential themes of broader significance. The identification of themes that provide significant links between data items and which answer key aspects of research questions is an 'active and interpretive process' (Kiger and Varpio 2020, 5) that happens by means of 'analyzing, combining, comparing and even graphically mapping how codes relate to one another' (ibid.).
- *Fourth phase: reviewing themes*
  In the fourth phase, themes are revised to work in relation to the coded extracts and the entire dataset. If necessary, themes are added, combined, split or discarded. To justify them, researchers look for commonality and coherence of data within, and distinction between, themes. Creating and refining a thematic map of the analysis, i.e. a map that shows how themes interrelate and how they represent the research question, may be helpful (Kiger and Varpio 2020).
- *Fifth phase: defining and naming themes*
  During the fifth phase, themes are defined and named in a clear, brief and sufficiently descriptive way. Overlaps between themes and emergent sub-themes are also identified (Kiger and Varpio 2020).
- *Sixth phase: producing the report*
  In the last phase, vivid, compelling data extracts able to illustrate key features of the themes are chosen for presentation in the final report. The final analysis is written linking back to the research question and literature, with the findings described in a narrative. The choices and assumptions underlying the analysis should be made transparent throughout the report. It is therefore recommended that researchers should take notes about their decision-making processes in each of the six phases.

4.2.2 Sequence analysis

Definition and application: Sequence analysis is part of the documentary method (Bohnsack et al. 2013). The analytical procedures of the documentary method open up access not only to the reflexive but also to the action-guiding knowledge of actors and thus to the practice of action (ibid.). The reconstruction of action practice aims at the habitual and partly incorporated orientation knowledge underlying this practice, which structures this action relatively independently from the subjectively intended meaning (ibid). Nevertheless, the empirical basis of actor knowledge is not abandoned. This distinguishes the documentary method from objectivist approaches which seek to unravel structures of action beyond the actor (ibid.). More precisely, the documentary method focuses not only on the explicit but also on the implicit knowledge of actors and asks about both 'what' and 'how' something is said or done. This makes it possible to tap into unspoken and, for example, milieu-specific tacit knowledge (ibid.). Sequence analysis differentiates between formulating and reflexive interpretations of text segments.

+   *Advantages:* The documentary method and sequence analysis can be used for various data sources like group interviews, narrative interviews and participatory observation (Bohnsack et al. 2013). It can also be used to triangulate different methods, to compare different scales or milieus and to produce new typologies. Sequence analysis does not remain at the superficial descriptive level of data analysis, but also produces new knowledge during the process of analysis.

—   *Disadvantages:* Sequence analysis can only be applied to textual data and not to visual data. While the formulating interpretation, which addresses explicit knowledge, can be learnt relatively easy and can be conducted fast with large amounts of textual material and without the use of additional software, reflexive interpretation is very time-consuming and may not be easy for beginners to use. Also, the analysis of large amounts of textual material may be exhausting.

Implementation: Sequence analysis is divided into two parts; the formulating interpretation and the reflexive interpretation (cf. Bohnsack and Nohl 2013). The first part, i.e. the formulating interpretation seeks to unrav-

el the thematic structure of the text material (the 'what'). Building on this, the reflecting interpretation, i.e. the second part, focuses on 'how' the topic is dealt with by informants. In principle, sequence analysis is about dividing textual material into meaningful sections and assigning headings to them. This can be done directly in the transcript.

In order to analyse the 'what', textual material is dived into different segments and each segment is given a headline describing what has been said.

- For better structuration, there are first order headlines, which describe the topic at a general level, and second order headlines, which are more concrete.
- It is good practice to highlight segments of text whose meaning differs from their neighbouring sections. This can be done by using comments, for instance.
- It can be helpful to take notes while going through the text, to avoid losing information.
- To disentangle the 'how' of what has been said, sequence analysis has to be conducted in a reflective-comparative way. This means that in the second analytical step, the researcher is looking for implicit regularities, which arise in the relation between expression and reaction.
- To achieve this, 'the class of reactions is searched for which not only seem to make sense thematically, but which are also homologous or functionally equivalent to the empirically given reaction' (Bohnsack and Nohl 2013, 326). To achieve this, equivalent cases should also be contrasted with different cases.

4.3. Participatory data analysis

When analysing empirical data according to a participatory research style, the aim is to actively involve various stakeholders, thus enabling the co-creation of knowledge and consequently co-ownership of results and subsequent actions. Reflection on the level of involvement should be a crucial part of the process, while the ladder of participation, based on Arnstein (1969) and further developed in Straßburger and Rieger's 2019 participation pyramid serves as a useful tool (see also the stage model applied in MATILDE, D2.8 Stakeholder Involvement Plan, Gruber et al. 2020). Participatory analysis can easily be achieved in most cases since data collection and interpretation coincide in many of the tools described above.

Infobox 10: Participatory data analysis according to 'Klagenfurter intervention research' (Krainer, Lerchster and Goldmann 2012, 219–230)

- **Phase 1 – Individual data analysis:** Each researcher analyses the data individually. Important passages are marked, categories are formed and thoughts on initial hypotheses are recorded. The following model questions can help with data analysis:
  - Which relevant topics are addressed in the material?
  - What is easy to understand? What causes irritation?
  - What emotions are noticeable?
  - What images, associations and hypotheses are encountered when analysing the material?

  It can be helpful if a person who was not involved in the data collection makes a brief summary of the interviews and adds quotations to support important points.

- **Phase 2 – Team analysis:** The aim of this phase is for team members to share their individual data analysis results as well as their individually built hypotheses. Several full day retreats may be needed to communicate the results. Questions about additional data (e.g. the need for further interviews) can also be discussed at this point. The team evaluation itself takes place in several steps:
  1. Valorisation of individual evaluation results
  2. Building first hypotheses in the team
  3. The final aim is to build background theories ('Hintergrundtheorien') for the respective field of research (e.g. a municipality) that can also be transferred to other fields (e.g. other municipalities).
  4. Validation loop ('Rückkoppelung'): Reflection, discussion and collective validation of the (preliminary) results with the research participants in order to arrive at a common perspective on different positions.

To increase the level of participation, further measures can be employed, including:

(1) setting up a research council for the whole research process, including a wide variety of (locally relevant) stakeholders to accompany the activities;

(2) involving stakeholders in the immediate analysis, for example by inviting actors to revise code plans;

(3) introducing validation loops for results, either by means of workshops for example, or in written form, depending on the target group;

(4) communicating results to the various groups in appropriate language and thus stimulating further discussion in communities.

5. Dissemination and stimulating transformation with research

It is obvious that empirical research in a certain region or municipality *per se* always represents an (un)intended intervention. 'Simply making contact introduces differences, and thus represents an intervention in the system and changes the perspective' (Hübner 2012, 162, author's own translation). Such interventions can also take place during data collection, not only during the asking of interview questions or the process of observation, but also in the context of data analysis and building hypotheses and background theories, as well as possible solutions in the context of feedback loops between the researchers and the practice system (e.g. stakeholders of the municipality investigated) (ibid., 162).

Interview questions can lead to reflections among the interviewees and, as a result, to changes in their behaviour. For example, the MATILDE Action Research in Carinthia (Austria) showed that migrant women and female refugees who participated in an all-female focus group were prompted to reflect on their own success stories by means of a participatory photo talk. Reflecting on their successes in turn showed them their own agency and power. Hence, research can lead to the empowerment of disadvantaged groups, especially when the target groups are directly involved (face-to-face), and consequently create changes in a (local) system.

According to the OECD (2002, 78), applied research is defined as an 'original investigation undertaken in order to acquire new knowledge. It is, however, directed primarily towards a specific practical aim or objective'. Hence, applied, practice-oriented research aims not only to provide new insights, but should also lead to 'benefits' for the practice partners or the practice system involved (Hagendorfer-Jauk and Gruber 2022), by means of policy recommendations, new solutions, or a change of perspectives on how something should be done in the future, for example. Thus, on the one hand, the joint evaluation of integration measures and migration impacts can represent an intervention in the fields of practice to be investigated and, on the other hand, offer the opportunity to gain a joint awareness of the current situation and work together on improved measures. Where practitioners and further stakeholders jointly evaluate integration measures and migration impacts, this can also increase the dissemination potential. Consequently, research results are not simply handed to the practitioners

by the researchers, as is usually done in the traditional division of roles between science and practice. Rather, in participatory migration impact measurement, practitioners from different fields are involved from the very beginning. The range of dissemination of results is thus already higher, from the very beginning of the research; the risk that research results remain in the drawer is lower. Instead, due to the involvement of different practitioners, the chance that research results will be taken up is much higher. If a feedback workshop is also run, additional stakeholders and interested parties can be invited to discuss the (preliminary) results. The findings, which in the traditional organisation of research would be handed over to the client representative (in a municipality, for example, this would be the mayor or responsible administrative officer), can be communicated to various stakeholders (including politicians, administrators, educational facilities, business operators, (migrant) associations and citizens) while the project is still running or is in its final phase.

Infobox 11: Policy roundtables

Policy roundtables can be a stimulating method for discussing, validating and complementing findings and preliminary policy recommendations[2]. A possible procedure for conducting feedback workshops in the form of policy roundtables, might be:

1. Selection of participants. Invitations sent to partners participating in the research (interview partners, focus group participants, etc.) as well as other relevant stakeholders (policy-makers, civil servants, entrepreneurs, chamber representatives, members of associations, citizens with and without a migration history etc.);
2. Presentation of the (preliminary) results;
3. Discussion of the findings in moderated mixed small groups (reaction to the results, additions, clarifications and contradictions); collection of results written on moderation cards;
4. Discussion of group results in plenary; possibility for further reactions, additions, contradictions; if the groups have also worked on concrete

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2 For detailed information on the organisation of different policy roundtables and their results in the context of the H2020 MATILDE research project, see https://matilde -migration.eu/wp-content/uploads/2023/01/d7-12-roundtables-on-policy-recom mendations.pdf and https://matilde-migration.eu/wp-content/uploads/2022/08/ D65-Report-on-the-thematic-round-tables-with-relevant-policy-maker.pdf (DOI: 10.5281/zenodo.7371866).

policy recommendations or solutions, these can also be presented for further discussion;

5. After that, the participants get the chance to rate which results, policy recommendations etc. are most important to them;

6. Finally, participants are told what will be done with the results and what further steps are planned.

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6. One Pager

The following one-pagers provide an overview of the presented tools, which are elaborated in detail in chapter 3, where all references and further readings can be found.

6.1. Municipality profile

What they are used for

This tool is intended to help municipalities to gain an overview of the current and future demographic situation, the special features of the municipality, the economy and labour market situation, the educational background of the population, the infrastructure, including education and healthcare facilities or public

Number of municipality profiles: 1
Number of participants: 5-15
Duration: several sessions of approx. three hours may be necessary

spaces, the budgetary situation and the social climate in the municipality, based on statistics, detailed information and qualified assessments. This standardised analysis can be carried out on a regular basis and enables comparison with other municipalities (bench learning). It is recommended that the profile is not filled in by just one person in the municipality, but that several people work together to co-create the profile. Both professionals and citizens without a specific function, with and without migration experience, should be involved. Representatives and multipliers from different fields of action (e.g. education/school, economy/business, senior citizens, women or migrants) should be invited to participate. However, not just stakeholders but also people from the target group itself should be included.

Pros and cons to consider

＋ *Advantages*	― *Disadvantages*
• The statistical data included in the profile also help to identify controversially discussed topics. • The joint development of the profile offers the opportunity to bring different perspectives to light (e.g. concerning the existing infrastructure or the climate of coexistence in the community). • Involving different, often excluded, groups gives them a voice, allows them to contribute their views directly and fosters their empowerment.	• A lot of work to prepare (compilation of statistical data) and implement (inclusive composition of the working team, several meetings may be necessary).

What to watch out for

!

- *Sampling:* Ideally, the initiative to create a municipality profile comes directly from a municipality. The commitment of municipal representatives is important to ensure their participation.

- *Location:* A room in a municipal building, or in a school or an NGO is suitable for this purpose.

How it is done

1. The moderator explains the purpose of creating a municipality profile and what will happen with the information collected.
2. The moderator or another appointed person presents the statistical information that has been already collected.
3. Open questions on the topic are discussed with the participants (similar to a focus group discussion; see also Infobox 11), to identify things that need improvement as well as possible solutions.

Documentation
- Collect statistical data in a prepared template!
- Document the discussion on flipcharts!
- Complete the municipality profile with the collected statistical and qualitative information!

6.2. Qualitative interview

What they are used for

Qualitative interviews are usually designed as a conversation. Their purpose is to collect empirical data in the form of qualitative, in-depth information on a specific topic and to stimulate reflections.

(i)

Number of interviews: no fixed number; data collection is stopped once no new insights are gained (saturation)
Number of participants per interview: 1 (or 2 if appropriate, e.g. couples)
Duration: 0.5–2 hours

Depending on the level of structuredness, different types of interview are possible, e.g. *problem-centred expert interviews* to gain expert knowledge, or *narrative interviews,* which aim to collect and understand people's perceptions of their own experiences, events and practices in their social context. It is possible to ask about an interviewee's entire biography or just about a specific period.

Pros and cons to consider

✚ Advantages	— Disadvantages
• Can grasp expert knowledge, views and real-life experiences of individuals that contribute to a deeper understanding of how people construct their realities in their respective national, regional or local settings.	• Interviewers must be flexible and need to react to the different level of experience of participants.

What to watch out for

!

- *Sampling:* The aim is to study a particular phenomenon in depth and detail. The sample usually contains small numbers and is derived purposefully rather than randomly.

- *Location:* When choosing a location for an interview, one has to consider the preferences of the participant (e.g. work place or private/semi-public space).

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How it is done

When the interviewer has finished introductions, which should include the purpose of the interview, the interview should follow a dramaturgical order. From the opening questions, the interview should move on to the main part and end with a summarising section and an outlook. Interview guidelines help to control its progress. In conducting the interview, several points should be considered, which include avoiding interrupting the participant or assuming an understanding of facts without giving the participant the opportunity to explain, and refraining from commenting or finishing the particpant's answers.

Documentation
- Take notes; these build the basis for a protocol!
- Record the interview to transcribe it afterwards!
- Critically reflect on the interview in the form of a debriefing!

6.3. Focus group

What they are used for

Focus groups are a special form of group discussion involving the interaction of a group of people, which aim at the sharing of views, perceptions, attitudes or experiences on a specific, predefined topic. In the explorative phase, focus groups help to identify real-world problems or generate research hypotheses. In the validating phase, focus groups can be used to discuss potential solutions to a problem or draft recommendations.

ⓘ

Number of focus groups: 4–6
Number of participants: 4–12
Duration: 1.5–5 hours
(online focus groups: ~1.5 hours)

Pros and cons to consider

+ *Advantages*	— *Disadvantages*
• Stimulate new ideas and questions. • Provide a forum for the perspectives of disadvantaged or marginalised groups. • Help marginalised groups to overcome feelings of systemic exclusion and foster their empowerment. • Rebalance power inequalities. • Insights into group dynamics and controversies. • Question researchers' assumptions and preventing them from drawing early conclusions.	• Group dynamics may prevent individuals from talking freely. • Experienced moderators are needed to handle difficult group dynamics and conversational situations (chatterboxes and silent participants).

What to watch out for

!

• *Sampling:* Select participants based on the research question/interest/defined problem and consider the social and demographic characteristics (e.g. age, gender, first language, ethnicity/race, social class) of the target group (greatest possible similarity or difference in composition).

• *Location:* When selecting a location be aware of the acoustics of a place and its accessibility and possible symbolic meanings for participants.

How focus groups are done

1. *Introduction:* Welcoming the participants, introducing oneself; explaining the topic and aims of the discussion; providing information about sponsorship, data protection, rules of the discussion;
2. *First-Person-Perspective ('I'):* Introductory question; participants present themselves;
3. *Group-Perspective ('We'):* Incorporating the practical or occupational background, collect participants' experiences related to the topic;
4. *Main Question ('It'):* Discuss main questions consecutively (i.e., from general to specific);
5. *Conclusions:* The researcher/moderator sums up the most important aspects of the discussion; (s)he comes back to open points and deals with final formalities.

Documentation
- Take notes!
- Record the discussion!
- Visualise important points on a notice board!

6.4. Open Space Technology (OST)

What they are used for

The Open Space or Open Space Technology (OST) is used for conducting large group workshops or conferences with participants, who should work on a specific problem. However, smaller groups with fewer than ten participants are also possible. An Open Space should have an organised 'openness', that does not confront the participants with a strict agenda (the 'law of feet' can be used during the group discussions). This method offers space to discuss different, controversial topics, such as rural development or the inclusion of migrants, in an informal atmosphere where participants are free to discuss topics that interest them.

Number of OSTs: as many as participants decide are needed
Number of participants:
500–1000; > 1000; ≤ 50
Duration: 1–3 days;
group sessions: 1–1.5 hours

Pros and cons to consider

✚ *Advantages*	▬ *Disadvantages*
• Relatively cheap opportunity to organise large group events. • Hearing different motivations and points of view can contribute to the empowerment of participants. • Participants' interaction is facilitated through collaboration, problem solving and self-organised groups. • Allocating the responsibility to the participants can ensure the project's sustainability.	• The ideas and perspectives of extroverted people may be overrepresented; those of introverted people may be underrepresented. • The method is suitable in the exploration phase, but rather problematic when aiming to improve existing projects (discussions can produce radically new ideas). • Using Open Spaces could mean handing control to the participants, with the consequence that research topics could take a different direction than originally planned.

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What to watch out for

! • *Sampling:* Addressing groups and institutions that may be interested in the main theme of the Open Space; self-selection of participants (they decide whether the topic is relevant for them).

• *Location:* Enough space to host a large number of participants; separate rooms for group discussions.

How they are done

• *Opening the room:* Introduce the person responsible for the event (e.g. state official/mayor/manager of an organisation) and the topic and method.

• *Bulletin Board:* Each participant is invited to step into the middle of the room to propose a specific sub-topic related to the main theme. Following that, this person becomes responsible for that topic, determining the time and room for group discussion (make a note on the bulletin board).

Documentation
• Document each group discussion!
• Put reports together into a collective report! Every participant receives a copy at the end of the event!
• Participants decide on the ten most importangt and relevant topics!

• *Market Place:* After collecting the different sub-topics on the bulletin board, participants are asked to sign up for different group sessions.

• *Group Sessions:* Each group can freely choose how to run its session, and each participant can join or leave groups according to their interest ('law of feet'). The moderator avoids interventions and ensures a safe environment which allows for fruitful discussion.

• *Closing plenary:* Participants reflect on the findings.

6.5. Observation

What is it used for

Observation is an ethnographic method which has become popular in many fields of social science. Ethnographic methods help researchers to understand how individuals create and experience their life-worlds, e.g. inhabiting social spaces or establishing local networks. During the observation all perceptible sensory

ⓘ

Number of observations:
depend on the topic
Duration: few hours up to few days

aspects of human action and reaction not initiated by researchers are recorded. An everyday observation can initiate orientation and gather information about a locality, a scientific observation follows principles like repeatability or intersubjective traceability. Depending on the level of moderator involvement, observations can be structured or unstructured. Schemes and categories for data collection and analysis should be defined beforehand. Observation guidelines can be developed to strengthen the degree of standardisation. Unstructured observations are also conducted in a systematic way. Observations should be transparent and should not be conducted covertly. Different types of researcher/moderator involvement can be distinguished:

participatory observation
- completely participating in the field, being (almost) invisible: **complete participant**
- widely participating in the field, but observer role is perceptible or is communicated explicitly: **participant-as-observer**

Non-participatory observation
- observation is given priority over the participation and there is a low level of researcher/moderator integration: **observer-as-participant**
- the researcher/moderator is not involved in any action and remains distant from the field (e.g. video recording only): **complete observer**

Pros and cons to consider

+ *Advantages*	— *Disadvantages*
• Observations take place in peoples' everyday environments and not in a laboratory setting. • Offer the chance to grasp complex issues, which might otherwise be expressed in a long-winded way. • Observation favours long-term and in-depth understanding of practices and situations.	• Observation is not objective, but always subjective and selective. • Researchers/moderators have to strike a balance between being interested and integrated into the field, increasing familiarity with situations and keeping a distance. • Continuous self-reflection is needed. • Observation requires a lot of time.

What to watch out for

! • *Sampling:* The field of human interaction to be observed must be chosen. Observers also have to identify a suitable research area and position. Access to the field of interest is crucial. Gatekeepers accepted in the group of interest can help with access.

How it is done

The observation follows three phases:

1. *Descriptive observation:* Orientation to the field, describing situations and actions in a relatively unstructured way, catching the field's complexity and clearly defining research questions.
2. *Focused observation:* Observations are noted which go well with the processes and problems of interest.
3. *Selective observation:* Validating the processes and patterns observed and gathering more selective examples of core interest.

Documentation
- Start taking notes as soon as access to the research field is achieved!
- Field notes and the researcher's interpretations, assumptions or judgements should not be mixed together!

6.6. Mobility mapping

What they are used for

Mobility mapping is a spatio-visual tool. It helps to investigate the spatial dimensions of everyday life of individuals or groups. Meanings attached to places and spatial (im)mobility are grasped. Mobility mappings can be drawn with individuals or groups, who are invited to draw maps with important (not necessarily frequently visited) places, transportation used, perceptions and experiences of distances, and the (in)accessibility of places. Mobility mappings can be combined with narrative interviews to acquire more in-depth information about travel purposes, frequencies, preferences or the meanings attached to places.

Duration: 45 min. – 3 hours
Work material: small cards of different shape; pictograms (e.g. on shopping, visits to authorities or services); coloured marker pens

Pros and cons to consider

+ Advantages	— Disadvantages
• Stimulates reflection about the (im)mobility patterns of an individual or group. • Less dependent on language and literacy. • Exclusion/inclusion experiences can be compared according to different variables (e.g. age or gender).	• Resource-intensive and time-consuming. • At least two people are needed to carry out mobility mapping. • Difficult to implement with participants who have only recently moved to their place of residence or who are not used to drawing exercises.

What to watch out for

!

- *Sampling:* Either a single person or a family can work on a mobility map. Depending on the aim of the study, either a supposedly homogenous or a rather heterogeneous group may be chosen.

- *Location:* When choosing the location for a mobility mapping, pay attention to the need for a big table or a lot of floor-space.

How it is done

1. *Introduction:* The researcher/moderator explains that the aim is to learn about the everyday lives and (im)mobility practices of the target group; participants are encouraged to draw and write for themselves; assistance is provided if needed.

Documentation
- Record the development process!
- Take photos of the mobility maps!
- Take additional notes on the interview!

2. *Implementation:*
   a) Participants are invited to draw their apartment/house/accommodation at the centre of the poster.
   b) Participants are asked to talk about the places they usually visit. After drawing, participants should clarify/add places they have mentioned but not written about or drawn.
   c) Participants arrange the small cards with depictions of places visited around the apartment/house/accommodation according to the perceived distance from their homes. If the participant is happy with the arrangement, the small cards are glued to the poster.
   d) Participants draw lines between their homes and the places visited, indicating the means of transport used (e.g. by foot, bike, public transport or car) with different coloured pens. Participants are encouraged to explain the meaning of the places drawn, their reasons for going there, what they do there, the duration and frequency of visits and their modes of transport.
   e) Participants draw/write places where they must go even though they do not want to, and places where they never go, on small cards. Finally, these cards are fixed to the poster.
   f) The distribution of roles should be adhered to during the entire process.

3. *Conclusion:* Participants are invited to sum up the results, researchers/moderators take a picture of the final version which is then handed over to the participant.

6.7. Social mapping

What they are used for

With social mappings people's realities should be investigated. Social maps are suitable for participatory situational analyses, grasping changes in social networks, needs surveys, planning and evaluation processes, as well as for research questions which aim to find out how people perceive their life worlds, their re-lationships within the community, their access to resources and their own agency. Via the process of drawing and talking, social maps allow participants to move from description to

Number of social maps: the number depends on the research purpose
Number of participants: both individuals and groups can be involved and 80–100 households
Duration: 1.5–2.00 hours
Work material: Cards of different colours

depiction to theorising the reasons for the ways in which they have repre-sented features on the map. At least two researchers/facilitators (moderator and note-taker) should be involved.

Pros and cons to consider

＋ *Advantages*	— *Disadvantages*
• A chance to visualise a variety of individual information about a specific place or network. • Participants can also join in later, discuss and add representations to the map. • Method can contribute to community-build-ing.	• The concrete area of interest should be clarified before starting the method. • The process of drawing and expressing the subjective views could be exhaustive for participants. • Social mapping needs a certain level of confidence.

What to watch out for

!

• *Sampling:* Social mappings can also be carried out with a selection of key informants who know the locality to be analysed well.

• *Location:* A central place that is accessible to all participants should be chosen. At the same time, this place should be comfortable and external influences, such as weather or noise, should be considered.

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How it is done

1. Moderators inform the participants about the study's objective, the research question and what is expected of them. Participants should be asked to draw the main physical features of their locality.

2. The moderator lets the discussion flow; participants should take the initiative and have total control over the process.

3. The moderator should pay attention to ensure that every section of society is involved and participates, and take proactive steps to involve them if necessary. Marginalised communities, in particular, should not be excluded, but should be motivated to contribute to the process.

Documentation
- Take notes during the mapping process!
- Record and explain details in the map indicated with symbols!
- Save the final results by taking a picture or copying the map!

4. The moderator's role is limited to facilitating the process; they should only intervene if necessary.

5. The moderator should ask for clarifications 'unobtrusively' (e.g. 'what does this symbol mean'?).

6. When the map is finished, some participants should be asked to identify their own houses.

7. Participants should provide information about their own households.

8. The distribution of roles should be adhered to during the process.

6.8. Participatory photo/video talk

What they are used for

Photo or video talks can be designed for various purposes, target groups and with a varying degree of participation. The aim is to gain a visual impression of the participant's living environment and how things shown on a picture are seen. Three different approaches can be distinguished:

> **Number of photo talks:** no fixed number; data collection is stopped once no new insights are gained
> **Number of participants:** 1 (or 2 if appropriate; e.g. for couples)
> **Duration:** visually stimulated interviews differ in length, depending, on the number of photos/-videos included, for example
> **Work material:** interview guidelines; small cards with instructions

- *Photo-elicitation:* Combination of photography and interview. The interviewer takes pictures which are discussed jointly with participants.
- *Auto-driving:* Photos of individuals in everyday life situations are taken over a certain period of time with the aim of identifying changes in participants' behaviour.
- *Photo novella:* Participants take photos or shoot videos themselves in order to document their life-worlds over a particular period of time.
- *Reflexive photography:* Participants produce the visual materials and a reflexive process is stimulated when the photo is taken and when the content of the photo is put into context during an interview.

Pros and cons to consider

+ Advantages	— Disadvantages
• Opportunity to grasp meanings of places and their social contexts from the point of view of individuals/groups. • Taking photos can stimulate further discussion and foster the acknowledgement of individuals' perspectives. • The photos can become a communicative bridge between the interviewer and the participant.	• Use more time, personnel and material resources. • Participants have different levels of experience of using a (video)camera.

What to watch out for

!

- *Sampling:* The aim is to study a particular phenomenon in depth and detail. The sample therefore usually contains a small number of participants. The sample is derived purposefully rather than randomly.
- *Location:* A decision about location has to be made twice: firstly, it is important to decide where photos/videos should be taken. The immediate living environments and individually important places of everyday life are most common. Secondly, the place where photos are to be jointly discussed should be carefully selected (and should have proper illumination and a large table). When choosing the location, the preferences of the participant should also be considered.

How they are done

1. The moderator introduces the method to the participant and suggests technical features of the equipment if photos/videos are to be taken by the participant. The interviewer should be available to respond to questions and problems during the photo/video phase and to conduct the interview afterwards. The photos/videos to be discussed should be available at the interview.

Documentation
- Take notes during the interview!
- Record the interview, transcribe it and mark where visual materials are inserted!
- Document, number and store photos/videos taken by participants!
- Reflect critically after the interview during a debriefing!

2. Start the interview by asking about the participant's experience of taking the photos.
3. Conduct the interview. Participants should be invited to talk about the photos whenever they wish. Results are achieved through a combination of picture and text.

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