

How Promotion Guidelines Reflect Swedish Higher Education Institutions' Societal Collaboration Strategies



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Introduction

Over the past two decades, there have been rising expectations on higher education institutions (HEIs) to matter in society by collaborating with different actors to generate societal impact (Benneworth et al., 2015; Trencher et al., 2014). These expectations stem from the prominent premise that HEIs should provide returns on public investments by playing a pivotal role in the knowledge-based economy, contributing to economic growth, welfare (Romer, 1990), and lately, sustainable development (Trencher et al., 2014). In light of these expectations, HEIs have introduced strategies that express organizational goals and intentions and provide guidance related to societal collaboration (Jongbloed et al., 2008). Although similarities exist, these strategies vary among HEIs regarding targeted activities, collaborative partners, and geographic coverage (Kitagawa et al., 2016). As such, the strategies signal the various ways in which universities aim to matter through collaboration.

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Since HEIs are professionalized organizations (Mintzberg, 1992), their ability to realize strategies depends on the willingness of individuals to act in line with the strategic intentions on an organizational level. In the HEI context, decisions on how and when to collaborate with external parties lie with individual researchers and teachers (Perkmann et al., 2013) since collaboration is established and conducted on a personal rather than a strategic level (Broström et al., 2019). However, despite strategic intentions, societal collaboration experiences are frequently undervalued among academics (Alperin et al., 2019; D'Este & Perkmann, 2011). Consequently, strategic intentions related to societal collaboration may be down-prioritized when strategies are to be translated into action on an operational level.

The capacity of HEI management to realize strategies depends on their ability to encourage and influence faculty by creating a supportive culture through socialization and by assessing the strength of their capacity (Thoenig & Paradeise, 2018). One way of steering on the individual level is through recruiting, promoting, and appointing academic staff (Alperin et al., 2019; Enders, 2001). Consequently, the realization of a strategy will depend on the alignment between expressed strategic intentions and promotion guidelines. While research has explored how the societal collaboration task is promoted through creating a supportive culture and socialization (e.g., Benneworth et al., 2015; Huyghe & Knockaert, 2015), less attention has been given to understanding the link between strategic intentions and how individual performances are assessed.

Against the above, we explore how the visions of societal collaboration put forward in HEIs' strategies are reflected in promotion assessment criteria. HEIs have guidelines for several different types of recruitment, promotion, and appointment. Given our research purpose, the promotion to docent (also known as a reader, associate professor, and, in the Germanic system, Doctor Habilitatus) stands out among these. In many countries, the criteria for promotion to docent have long been deregulated in higher education statutes, and it is thus up to specific HEIs to shape their standards. Additionally, each faculty within an HEI creates its qualification criteria, which can be highly specific to the discipline (Hammarfelt et al., 2023; Joelsson et al., 2019). This gives HEIs ample room to exercise their strategic intentions. Furthermore, the promotion to docent concerns mid-career academics in the formative stage of their profession and thus plays a vital role as a vehicle for strategic intentions (Enders, 2001). Even though docents frequently move between different institutions and thereby do not necessarily present the priorities of their current institution, promotion can be viewed as a means for retaining individuals by offering tangible career opportunities. According to requirements, the individual's link to the institution should be apparent. Thus it should reflect the university's spirit, including the quest and virtue of making the university matter.

We focus our analysis on Swedish HEIs since this population is relatively diverse and has long been under pressure to develop their strategies and distinct institutional profiles (Geschwind & Broström, 2015). In addition, in recent years, Swedish HEIs have been particularly incentivized to work strategically with their societal collaboration task (Wise et al., 2016). Thus, the Swedish context allows us to explore a diverse range of HEIs and paves the way for a rich understanding of the phenomenon in focus:

how societal collaboration strategies are implemented and assessed in recruiting mid-career academics.

Next, we offer an overview of the literature that makes up the background of this study. We then describe the empirical context for the study, followed by descriptions of the methods applied. After that, we present the analysis and provide a concluding discussion and implications of the study.

HEI Strategies and Promotion Guidelines Related to Societal Collaboration

This section reviews the literature on the strategy and governance of HEIs related to societal collaboration and accounts for conceptualizations that offer a structure for our analysis.

Societal Collaboration Strategies and Promotion

HEI strategies can be described as how HEIs define their position, given contextual conditions, and direct their organizational processes (Fumasoli & Lepori, 2011). However, strategies are not a given means of governance in academia, mainly for two reasons. First, strategies may be more or less formally declared and, while frequently adhered to by top-level management, they are seldom wholly endorsed by faculty (Thoenig & Paradeise, 2018). This reflects the nature of HEIs as professional bureaucracies with highly trained professionals demanding control of their work (Ferlie et al., 2009). They try to resist being steered by HEI management as their legitimation lies more with scientific peers than organizational identities (Paradeise et al., 2009). Second, a strategy is set at a certain point in time, reflecting particular priorities and intentions. However, these priorities change over time through the internal dynamics that follow implementation (Thoenig & Paradeise, 2018).

In recent years, policymakers have introduced initiatives targeting the strategic organization of HEIs related to societal collaboration, often advocating for ideal types based on top American HEIs. Examples include the entrepreneurial university (Clark, 1998), the triple-helix model (Etzkowitz & Leydesdorff, 2000), and the engaged university (Watson et al., 2011). Despite these ideals, HEIs differ in their understanding of and organization for societal collaboration and impact. One reason is that diverse higher education policy regimes hold varying expectations for HEIs to foster economic progress, democracy, innovation, and global competitiveness (Benneworth, 2014). HEI responses are also conditioned by regional characteristics, access to resources, research intensity, student population, the composition of disciplines (Jongbloed et al., 2008; Pinheiro et al., 2015), historical roots (Rose et al., 2013), and stakeholder composition (de la Torre et al., 2019). Consequently,

HEIs create heterogeneous societal collaboration approaches that combine answers to external isomorphic forces and diverse local institutional contexts (Kitagawa et al., 2016).

Despite the focus of policymakers and organizational agenda-setting on HEI management, societal collaboration is mainly realized by individual researchers and teachers (Perkmann et al., 2013), which emphasizes the importance of incentives. While extant research on societal collaboration has explored the role of institutional determinants (i.e., policy and national systems), organizational peer effects (i.e., support systems), and individual demographic characteristics (i.e., age, sex, productivity), less attention has been given to formal internal organizational-level incentives (Jonsson et al., 2015; Perkmann et al., 2013, 2021). One of these incentives concerns promotion guidelines for mid-career accreditation, referred to as docent, reader, or associate professor, that is applied in European countries such as Germany (Enders, 2001), Italy (Abramo & D'Angelo, 2015), Spain (Sanz-Menéndez & Cruz-Castro, 2019), Finland (Pietilä & Pinheiro, 2021) and France (Musselin, 2004), as well as in non-European countries (Allen, 1988; Rice et al., 2020). In contrast to competitive selection processes for a position, or non-competitive elimination processes in a tenure track, this accreditation is a promotion to a title where candidates do not have to leave their position if they fail (Musselin, 2004). While there are many similarities, such as the focus on research qualifications that correspond to an additional doctoral dissertation, there are variations between countries. For instance, the French system focuses on thematic continuity and depth, and the German system values thematic mobility and coherence (Musselin, 2004). To emphasize the distinction that docentship is not an employment in Sweden, we use the term *docent* in the paper instead of the more internationally recognized “reader” or “associate professor.”

Since docentship accreditation guidelines signal how faculty should prioritize their efforts (Alperin et al., 2019; Enders, 2001), they influence the competence and activities of academia and the societal role of HEIs. Yet, to our knowledge, no studies have captured how societal collaboration is defined and assessed in these procedures and how these attempts to shape faculty actions align with strategic intentions.

Aspects of Societal Collaboration

Research on the societal collaboration of HEIs is highly diverse regarding definitions of the phenomenon, theoretical underpinnings, and applied methods. Below we provide an overview of a selection of this research according to four aspects that guided us in our analysis of how strategies and promotion assessment criteria vary.

The first aspect concerns stakeholders, including private actors, public organizations such as agencies and hospitals, and civic organizations and NGOs (D'Este et al., 2018). While research has focused chiefly on the effects of academics' collaboration with industry (see Perkmann et al., 2013, 2021), studies have begun to include more types of stakeholders.

The second aspect concerns interaction modes that relate to different aspects of academic work, such as research (e.g., collaborative, contract and action research, shared facilities and research infrastructure, mobility of persons and shared employments), education (e.g., contract and professional education, societal alignment of educative programs, student placements and case studies, external teaching and supervision), knowledge commercialization (e.g., development and diffusion of innovations, venture creation), and outreach (providing advice and expertise, participation in public events and popularization of research) (Perez Vico, 2018).

The third aspect concerns the extent to which societal collaboration is considered reciprocal in terms of emphasis on mutual knowledge creation and interactive learning. While reciprocity is key in studies on research collaboration and university-industry interaction (e.g., Bozeman & Boardman, 2014; Perkmann & Walsh, 2007), this is less obvious in third mission and academic entrepreneurship studies that more often focus on the one-way transfer and application of university capabilities outside academia (e.g., Bercovitz & Feldman, 2006; Molas-Gallart et al., 2002). For example, a researcher may conduct a third mission activity, such as writing a popular science book, with a negligibly small degree of reciprocal knowledge sharing and societal interaction. However, in practice, reciprocity is significant for successful collaboration activities (Molas-Gallart & Tang, 2011; Spaapen & Van Drooge, 2011).

The fourth aspect concerns whether collaboration is integrated into academic scholarship or whether it is seen as something additional. Many studies view collaboration partly as a task that is additional to traditional ones (e.g., Abreu & Grinevich, 2013; Bozeman, 2000) or even as, per definition, one that includes activities not covered by the core HEI tasks (e.g., Breznitz & Feldman, 2012; Trencher et al., 2014). In fact, many European HEIs have decoupled teaching and research activities from third mission tasks (where societal collaboration is usually included), which means that societal collaboration is considered peripheral to core activities (Benner & Sörlin, 2015; Pinheiro et al., 2015). Other studies have taken a transversal view of societal collaboration that underlines the embeddedness in other HEI tasks (e.g., Spaapen & Van Drooge, 2011).

As is apparent, the type of stakeholders and modes, as well as the extent of reciprocity and integration, make up different dimensions for capturing and distinguishing various perspectives on how universities can matter through societal collaboration. Thus, these aspects offer a perspective for our analysis of how strategies and promotion assessment criteria vary.

Empirical Context—Swedish HEIs, Societal Collaboration, and the Role of Docentship

At the point of data collection, the Swedish HEI sector included six Broad-based (comprehensive) established universities, six Specialized (often one-faculty) universities, five New universities that received university status after 1999, 15 University

colleges that have not received the full status of “university,” and four Art, Design and Music Academies (Hansson et al., 2019). Broad comprehensive universities generally have a more substantial research focus than younger universities and university colleges. Recent developments in the Swedish sector include an increased proportion of competitive funding, decreased formal collegial influence as appointed (not elected) academic managers gain power, and strengthened organizational autonomy (Pinheiro et al., 2014).

Swedish HEIs have a strong tradition of societal collaboration since most were founded in response to practical local needs (Benner & Sörlin, 2015). Thus, collaboration has historically been rich, and early examples included extensive mobility of professionals, provision of expert advice, and collaboration in education. While collaborating with society was seen early on as integrated with the education and research activities in Swedish HEIs, it was enacted unsystematically, mainly driven by individuals and groups. Around the 1970s, a significant decoupling of the task commenced in Swedish HEIs (Perez Vico et al., 2017). In parallel, an enduring political will to increase HEIs’ societal collaboration grew out of a perception that levels of collaboration were low (Benner & Sörlin, 2015). Consequently, policy initiatives addressing this perceived deficiency were launched. This included funding programs for university-industry interaction, building intermediary structures such as technology parks, incubators, and tech transfer offices, and introducing societal collaboration as a “third task” in the higher education ordinance in 1997 (Benner & Sörlin, 2015). However, HEIs have been unable (or unwilling) to integrate societal collaboration with core activities (Lidhard & Petrusson, 2012).

In 2013, the Swedish government assigned Vinnova (the Swedish Innovation Agency) the task of developing a framework for assessing the performance and quality of HEIs’ interaction with the surrounding society (Wise et al., 2016). In response, 26 HEIs presented their strategic intentions, which comprise part of this study’s empirical material. In light of this development, societal collaboration began to find its way into guidelines for assessment for appointments and promotions (Bergstrand et al., 2021). In 2019, the Association of Swedish Higher Education Institutions highlighted societal collaboration merit assessment as a strategic instrument for management (SUHF, 2019). However, there are clear signs of uncertainty about how collaboration should be defined and assessed in these procedures, and indications that societal collaboration skills are overshadowed by merits related to research, teaching, and leadership (Bergstrand et al., 2021; Hammarfelt, 2021). While a group of Swedish HEIs recently mapped societal collaboration merit assessments (Bergstrand et al., 2021), docentship assessment is not specifically addressed.

In Sweden, “docent” is an unregulated academic title mandated by specific faculties that decide upon guidelines for application, assessment, and approval (UKÄ, 2022). Thus, there are varying expectations for the approval requirements and duties of a docent, with some faculties requiring a research output equivalent to another PhD dissertation and others requiring at least twice that much, and the level and volume of pedagogical merits expected can also vary. The docentship is important for the holder’s career progression and strengthens the reputation of the granting institution. The title is frequently required for involvement in PhD training activities

such as principal supervisor, external reviewer, and examining committee member, and may be required for appointments as an external expert and positions such as associate or full professor (UKÄ, 2022).

Methods and Material

This study involves a document analysis of two sets of material: the societal collaboration strategies of 25 Swedish HEIs and 57 guidelines from 28 Swedish HEIs for the application and assessment of docentship. An overview of the data is offered in Table 1. Not all Swedish HEIs are represented in our data. University colleges of fine, applied, and performing arts do not use the docentship (UKÄ, 2022) and are thus excluded. Further, not all HEIs presented strategies at the time of data collection, and not all HEIs' guidelines were available. However, our empirics include data from a significant share of the 32 Swedish HEIs with over 150 employees in 2021. These data sets were coded and examined separately and conjointly, and the analysis was guided by our aim to explore how societal collaboration intentions in strategies are reflected in promotion assessment criteria.

The societal collaboration strategies were submitted as part of a tentative assessment exercise conducted by Vinnova, where 26 out of 30 Swedish HEIs participated. One of these was excluded from our data since it was a university college of fine, applied, and performing arts. The remaining 25 documents present the HEIs' visions and intentions to strengthen and develop societal collaboration and describe their implementation work, and they give a contextual description of the HEIs' roles and conditions for collaboration. The documents included between 12 and 21 pages of text. Of the 25 HEIs, 5 were broad comprehensive universities, 5 were specialized universities, 6 were new universities, and 9 were university colleges. The categorization of university status follows the division at the time of collection, which means that Mälardalen University, which has since received university status, was categorized as a university college. The strategies were coded using NVivo in a coding approach. First, we conducted open coding according to the topic of the text in all retrieved documents. Second, we used the four aspects of societal collaboration outlined in the literature review to guide our construction of second-order themes for the first group of codes and discussed these to reach a consensus as regards the aggregation and naming of codes.

The docentship guidelines were collected in June 2021. The inclusion criteria were that the HEI is a Swedish university or university college that can award doctorates, thus conducting independent research. We retrieved 57 guidelines, of which 32 pertain to broad comprehensive universities, 5 to specialized universities, 8 to new universities, and 12 to university colleges. Two HEIs—Jönköping University and Stockholm School of Economics—did not have docentship guidelines available at the time of data collection; either they could not provide such a document, or they failed to answer our request. The docentship guidelines were examined for the inclusion of criteria related to societal collaboration merits in academia, such

Table 1 Strategy documents and the number of guidelines that mention social collaboration per institution

#	HEI Category	HEI	HEI, full name	Faculty guidelines	Strategy present	Guidelines mentioning collaboration
1	Broad, established universities	GU	University of Gothenburg	EC, HU, JU, AR, ME, NA, SA, IT	1	7 of 8
2	Broad, established universities	LIU	Linköping University	ALL, ME, TE	1	2 of 3
3	Broad, established universities	LU	Lund University	EC, HU, JU, AR, ME, NA, SA, TE	0	5 of 8
4	Broad, established universities	SU	Stockholm University	HU, JU, NA, SA	1	4 of 4
5	Broad, established universities	UMU	Umeå University	HU, ME, NA/TE, SA	1	3 of 4
6	Broad, established universities	UU	Uppsala University	HU, JU, ME, NA/TE, SA	1	2 of 5
7	Specialized universities	CTH	Chalmers University of Technology	TE	1	0 of 1
8	Specialized universities	KI	Karolinska Institutet	ME	1	1 of 1
9	Specialized universities	KTH	KTH Royal Institute of Technology	TE	1	0 of 1
10	Specialized universities	LTU	Luleå University of Technology	TE	1	1 of 1
11	Specialized universities	SLU	Swedish University of Agricultural Sciences	ALL	1	1 of 1
12	Specialized universities	SSE	Stockholm School of Economics	–	0	–
13	New universities	KAU	Karlstad University	HU/SA	1	0 of 1
14	New universities	LN	Linnaeus University	ALL	1	0 of 1
15	New universities	MA	Malmö University	ALL	1	1 of 1

(continued)

Table 1 (continued)

#	HEI Category	HEI	HEI, full name	Faculty guidelines	Strategy present	Guidelines mentioning collaboration
16	New universities	MI	Mid Sweden University	HU/SA, NA/TE	1	2 of 2
17	New universities	ÖU	Örebro University	HU/SA, ME, NA/TE	1	1 of 3
18	University colleges	BTH	Blekinge Institute of Technology	ALL	1	0 of 1
19	University colleges	FHS	Swedish Defence University	ALL	0	1 of 1
20	University colleges	GIH	The Swedish School of Sport and Health Sciences	ALL	0	1 of 1
21	University colleges	HB	University of Borås	ALL	1	0 of 1
22	University colleges	HD	Dalarna University	ALL	1	1 of 1
23	University colleges	HH	Halmstad University	ALL	1	1 of 1
24	University colleges	HIG	University of Gävle	ALL	1	1 of 1
25	University colleges	HIS	University of Skövde	ALL	0	1 of 1
26	University colleges	HKR	Kristianstad University	ALL	1	1 of 1
27	University colleges	HV	University West	ALL	1	1 of 1
28	University colleges	MDH	Mälardalen University	ALL	1	1 of 1
29	University colleges	SH	Södertörn University	ALL	1	0 of 1
30	University colleges	HJ	Jönköping University	–	1	–
Total					25	39 of 57

as references to collaboration with the surrounding society, third mission activities, popularization, innovation, etc. The collection process included visiting the web page of each HEI to download the guidelines, accompanying material such as instructions for applicants and assessing experts, forms, and instructions for generating a CV or a merit portfolio. In some instances, other documents, such as the general appointment procedure of the HEI, contain information about the appointment procedure and are referred to in the guidelines. The inclusion criteria for additional documents were that if the policy refers to an external document (e.g., a merit portfolio), we identified

this document and used the part referring to the docent application in the analysis. Guidelines were issued in very different periods. The latest guideline was published in the same month (June 2021) that the data were collected, while the earliest was over 12 years old. With a few exceptions, the guidelines are written in Swedish.

Different Types of Societal Collaboration

While the aspects of societal collaboration relating to HEI *strategies* overlap to a considerable extent, we have identified three types of involvement in societal collaboration in the *guidelines*. These include the strength of collaboration involvement, that is, the *degree* of societal collaboration involvement requested in the guideline, ranging from merely mentioning it and mentioning it with examples to including criteria for what is considered successful collaboration. These are mutually exclusive. Furthermore, we assessed the *aspect* of the societal collaboration identified in the guideline, ranging from “research information” (one way), “collaboration having a societal impact” (two-way), to the societal collaboration entity being “integrated” in society leading to utilization and commercialization. Lastly, we identified that societal collaboration could be attributed to merits of one or more different *types* of collaboration. We classified the guidelines into scientific, pedagogical, own merit, and other merits (often linked to administrative or leadership skills). The latter two categorizations are not mutually exclusive, and a guideline can include more than one aspect of the collaboration type.

We also divided the guidelines into disciplinary categories. Some HEIs have only one guideline for the entire organization, while others have guidelines according to scientific areas. The broad, established universities were more likely to have one guideline per subject area. For instance, the universities in Lund and Gothenburg each have eight guidelines. Specialized universities are typically focused on specific areas, such as medicine or technology, so they often adhere to one guideline. In contrast, New universities use broader categories such as humanistic/social sciences or natural sciences/technology/economics. Lastly, the university colleges invariably only have one guideline each, regardless of the subject areas present, possibly based on their relatively smaller administrative sizes.

While analyzing disciplinary differences, we observed that differentiating guidelines into distinct subject categories is not straightforward. As a result, for analytical purposes, we have determined three main subject areas and one all-encompassing category covering the whole HEI (ALL). The subject areas are 1) The humanities (HU) and the social sciences (SA) (including education sciences, economics (EC), and law (JU)); 2) the natural sciences (NA), technology (TE), and information technology (IT); and 3) Medical sciences (ME).

The guidelines provided by specialized universities in the medical and technological fields have been classified into separate categories: the medical sciences and natural sciences/technical disciplines. However, the agricultural university (SLU), due to its extensive range of disciplines, has been placed in the all-encompassing

category. The topic of artistic research (AR) has not been addressed explicitly, as only one guideline in that area specifically included statements related to societal collaboration.

When referring to strategies and guidelines, we use the following terminology and abbreviations: document type (STR = strategy, GUI = guideline), abbreviation of the HEI name, and abbreviation of the disciplinary research domain (not applicable for strategies). Thus, a guideline about the social sciences at Umeå University receives the code GUI UMU SA. In some cases, HEIs present joint guidelines. It applies to humanities and social sciences (HU/SA) as well as to natural sciences and technology (NA/TE).

Analysis

We explored how the visions of societal collaboration put forward in strategies are reflected in promotion assessment criteria by comparing the patterns that emerged as we examined the data sets separately and in comparison. We present the findings from these analyses in the following subsections. All quotes have been translated into English by us unless noted otherwise.

Misalignment Between Strategies, Intentions, and Promotion Guidelines

To explore the alignment between strategies and guidelines, we first analyzed the strategies of HEIs. Some weak patterns emerged. First, the broad universities do not mention different actors in their strategies as often as new universities do, nor do they mention as many types of actors. Industry is the actor mentioned the most, except for broader universities, where public sector actors are most cited. Second, concerning the kinds of research activities, broader universities mention less diversity of research activities in their strategies. This university group mainly exemplifies activities such as large, formalized collaboration agreements and mobility as crucial for interaction with societal actors. Together with specialized universities, broad universities emphasize their involvement in technology transfer with activities related to commercialization, entrepreneurship, and patenting. Third, in terms of which type of HEI shows the highest degree of ambition in their strategy, we find that university colleges, such as Dalarna University and Halmstad University, as well as broad comprehensive universities, such as the University of Gothenburg and Uppsala University, and specialized universities, such as Chalmers University of Technology and the Swedish University of Agricultural Sciences, fit into this category. These HEIs often underline that collaboration is an integrated part of their core task (i.e., research and education), providing reciprocal learning. This quote highlights this goal:

The aim is that the collaborative task should be an integrated and natural part of the educational and research activities. We call it “complete environments.” This means that we want to take advantage of and strengthen the capability that our research and education already possess. (STR GU)

Only three HEIs (GU, HH, and SLU) align with expressed strategic intentions and promotion guidelines. One example is the University of Gothenburg, which highlights the importance of collaboration with an emphasis on offering spaces for interaction and networks across various actors and sectors. This university has different guidelines for different subject areas/faculties. Even if there are variations where, for example, the humanities do not mention collaboration, it is clear that the guidelines reflect the university’s overall ambition for collaboration. For example:

Contact activities and information activities in addition to pure teaching are one of the university’s tasks. Effort to disseminate research results in [the wider] society is a merit when applying for docentship. (GUI GU NA)

Another HEI that stands out is Halmstad University. Their broad and integrated strategy focuses on industrial and public actors and teaching, commissioned research, and outreach.

Community development and relevance are cornerstones of the strategy, and at the same time, the risk that a collaboration strategy is not in line with the higher education institution’s overall goals is minimized. Even if collaboration has its own value, it is the positive effects from societal relevance in education and research that are achieved through collaboration that are important. (STR HH)

Such high ambitions are also found in the guidelines. See the following quote:

Leadership and administrative skills concerning research and management of research staff as well as research policy assignments are meritorious. It is also an advantage if the applicant has demonstrated good ability to collaborate with business and/or the public sector, i.e., activities outside the higher education sector, and has contributed to disseminating and creating an understanding of research results. (GUI HU ALL)

At eight HEIs, there is an apparent misalignment between bold visions and intentions and how collaboration is treated in the promotion guidelines. One illustrative example is the specialized Chalmers University. As a technical university focusing on education and research that practitioners can use, there is a long tradition of collaborating with industry through research and education. This is also clearly stated in the strategy. However, collaboration is not mentioned at all in their guidelines. Another example is Karlstad University. Their strategy emphasizes the importance of collaboration and the long tradition of working with various actors, yet collaboration is not mentioned at all in their guidelines.

There are also cases of HEIs with bold strategies where collaboration is only mentioned vaguely in the guidelines. One example is Södertörn University, which describes how they collaborate extensively with public actors and civil society through networking and student internships. In the guidelines, however, collaboration is mentioned very vaguely, more as a subordinate clause in exceptional cases when the applicant is not an employee. The following quote demonstrates this:

Only when the applicant is not employed at Södertörn University does an assessment by the head of the department need to be submitted [attesting] that the applicant's docentship benefits the university's education, research and collaboration [objectives] and that the applicant should be accepted as a docent at Södertörn University. (GUI SH ALL)

The last example is Dalarna University. Its broad vision statement highlights the importance of shared responsibility with societal actors regarding research and education. Despite the bold strategy, collaboration is only mentioned as a pedagogical merit concerning research communication.

Our analysis also reveals that there are two HEIs (Kristianstad University and Karolinska Institutet) that prioritize the experience of collaborating with different actors in their guidelines, but this ambition is not expressed in their strategies.

Of the 29 HEIs, only six show alignment between the ambitions and perspectives on collaboration as expressed in the strategies and the extent and form in which collaboration is included in the promotion guidelines. Among these six, we find the three previously mentioned HEIs with bold collaboration visions reflected in the promotion assessment criteria: GU, HH, and SLU. In addition, the university colleges of Borås and Gävle also reveal alignments but present strategies that do not stand out as particularly bold. Instead, these two HEIs offer a narrow view of collaboration in their strategies by mainly focusing on commercialization and employment connections. The promotion guidelines also reflect this comparatively modest strategic priority given to collaboration. To be eligible for a docentship at the University of Gävle, it is briefly stated that the applicant should have

collaborated with the surrounding community to be able to utilize research results. (GUI HIG)

Stockholm University is the last HEI that reveals alignment between strategy and promotion guidelines. They present a rather pronounced strategy in terms of the diversity of forms. Yet, they offer a linear view of collaboration focusing on knowledge dissemination from academia to external actors rather than bilateral mutual learning. This is, however, very well aligned with how their promotion guidelines are formulated:

To be accepted as a docent, a documented ability for independent research work, pedagogical skills, and documented experience in conveying scientific results to target groups outside the academic world are required. (GUI SU NA)

Our analysis shows that 18 HEIs reveal a misalignment between their strategy's vision for societal collaboration and how collaboration is treated in their promotion guidelines. This includes both HEIs that express higher ambitions in their strategy than those described in the promotion guidelines and vice versa. The misalignment between strategy and promotion guidelines indicates that the strategies are not used as a steering mechanism in the career policies.

Variation Regarding the Role of Societal Collaboration Merits in the Guidelines

Almost all HEIs' strategy documents describe collaboration as an integrated part of research and teaching. The three HEIs that do not explicitly describe collaboration as integrated with research and teaching (KI, LNU, and SU) still present formulations in their strategies that vaguely indicate such a view. However, there appears not to be a consensus on where collaboration qualifications should be reported in the guidelines. Given an integrated perspective, one expected place would be collaboration-related aspects both under educational and research qualifications. However, this is the case in only six guidelines.

In the strategy documents, societal collaboration is mainly described as having integrated scientific and pedagogical value. Here, the social sciences and humanities (including law) at broad comprehensive universities seem to represent this combination to a higher degree along with one specialized university and one university college.

The societal collaboration task is part of the educational task, and experience can be validated through, for example, popular science lectures and seminars. (GUI GU JU)

[As pedagogical merit]: The degree of ability and interest in disseminating research results out into society. (GUI SLU ALL)

[As scientific merit]: The degree of ability to collaborate with industry and other organizations outside the university. (GUI SLU ALL)

Another variation is seen between the type of merit(s) described in the application instructions and the evaluation criteria given to the external referee. For instance, at the humanities faculty at Stockholm University, there are two guidelines—one for the applicant and one for the referee. Societal collaboration is mainly considered a scientific merit in the former, while in the latter, the referee is asked to focus on societal collaboration as a pedagogical merit.

However, many HEIs mention collaboration related either to education or research qualifications. As for education, one example comes from the Faculty of Arts and Sciences at Linköping University, where this merit is also considered to include “administrative efforts”:

The pedagogic qualification also includes administrative efforts such as planning and management of teaching, development of learning materials, supervision, research information, popular science activities, and cooperation with the surrounding society. (GUI LIU ALL)

There were, however, only two HEIs that exclusively mentioned collaboration related to research, namely, the Faculty of Science and Technology at Umeå University in a checklist for the reporting of publications, and the Swedish Defence University:

In an applicant's production, emphasis is primarily placed on pure scientific works. Qualified investigation reports, research information, and valid popular representations, however,

also have merit. In addition to their educational value, seminal textbooks can also have an independent scientific value. (GUI FHS ALL)

In some cases, including the example above, when considering societal collaboration as a scientific merit, it is connected to what types of publications are considered meritorious for docentship. The guideline from the Faculty of Science at the University of Gothenburg states “popular science works” under the heading “Complete list of publications.” (GUI GU NA).

Another possible procedure for including collaboration qualifications from an integrated perspective would be to mention them with other generic transversal abilities, such as administrative and leadership skills. This often occurs under the heading “Additional merits.” This is relatively common—14 examples from 10 HEIs are distributed over all types of disciplinary domains and HEIs. All guidelines from the new universities mentioning societal collaboration pertain to other/administrative merit and not to scientific, pedagogical, or own merits.

In six cases, collaboration was given its own section in the guidelines. For instance, the guideline related to the Faculty of Social Sciences at the University of Gothenburg contains the heading “External contacts and information about research and development work” (GUI GU SA). A more detailed description of where societal collaboration is considered a necessity for eligibility is given by the Swedish School of Sport and Health Sciences.

To be accepted as a docent, the applicant must have proven experience of collaborating with the surrounding society, have communicated their research, and have worked to ensure that their research results are useful in society. Educational activities are directed to GIH’s recipients and the general public. This applies to, e.g., participation in media (newspapers, radio/TV), popular science lectures/seminars/panels, or books/writings/articles. (GUI GIH ALL)

The example above is one of only two HEIs where societal collaboration is exclusively classified as a merit in its own right. The other case is the Faculty of Engineering at Lund University (GUI LU TE). Societal collaboration merits are usually considered in different categories, such as scientific, pedagogical, and administrative/other merits.

This analysis shows that collaboration skills are linked to various aspects of academic competence. However, most HEIs do not reflect an integrated perspective in their promotion guidelines since collaboration abilities are often linked to a particular skill, for example, an “additional or pedagogical skill.”

Disciplinary Plurality Among HEI Categories

In addition to the partial integration of social collaboration as a merit in the guidelines, what other characteristics can we attribute to them? In this section, we aim to explore this issue in greater detail by analyzing the collaboration patterns among HEI categories and the disciplinary disparities between guidelines.

HEI Category—Societal Collaboration as “Other Merit” at New Universities

Broad comprehensive universities include societal collaboration as a basis of evaluation in their guidelines, while no clear pattern exists among specialized universities. At all universities, collaboration is predominantly linked to pedagogical skills. This is seen through the various ways collaboration merits are discussed and the degree to which they are used in the guidance. Broad universities highlight only one-way popularization (popular science texts or lectures) to a higher degree than new universities, which more often consider collaboration merits as “other merits.” Additionally, they only mention societal collaboration in passing without any examples. Specialized universities are few, so it is impossible to draw any clear conclusions.

Several university colleges are bold in their guidelines and present societal collaboration as an important criterion for evaluating docent merits. Yet, only 3 out of 12 universities that mention collaboration do so explicitly and put forward innovation and deeper interaction with the surrounding society as relevant.

In general, pedagogical merits are highlighted, but many HEIs also bring forward administrative/other societal collaboration as a scientific merit. In contrast, the description of societal collaboration as a separate merit is somewhat rarer (see Table 2).

What stands out most regarding the HEI category and societal collaboration is that new universities exclusively list it as administrative/other merit. These universities ascribe less importance to societal collaboration and seldom specify which aspects of societal collaboration should be assessed. Furthermore, although the sample of specialized universities is small ($n=5$) and thus the basis for variations is limited, none of these HEIs present societal collaboration as a separate merit. This is a pattern that they share with the new universities.

Regarding the “aspects” of societal collaboration mentioned, they include Aspect 1: “research information” (one way); Aspect 2: “collaboration having a societal

Table 2 Type of collaboration merit per HEI category

HEI category	Scientific (n)	Pedagogical (n)	Own (n)	Administrative/ other (n)	Grand Total (n)
Broad, established universities	8	14	4	5	31
Specialized universities	1	4	0	2	7
New universities	0	0	0	4	4
University colleges	2	4	2	3	11
Grand Total	11	22	6	14	53

Table 3 Collaboration aspect per HEI category

HEI category	Aspect not stated (n)	Aspect 1: research information % (n)	Aspect 2:: societal impact % (n)	Aspect 3: fully integrated % (n)	Total (n)
Broad, established universities	0%	72% (21)	24% (7)	3% (1)	29
Specialized universities	0%	60% (3)	20% (1)	20% (1)	5
New universities	75% (3)	25% (1)	0%	0%	5
University colleges	7% (1)	43% (6)	29% (4)	21% (3)	14
Grand Total	8% (4)	60% (31)	23% (12)	10% (5)	52

impact” (two-way); and Aspect 3: “fully integrated” (leading to utilization and commercialization) (Table 3). University college guidelines often emphasize collaborative aspects which encompass both the utilization and integration of skills aspects of collaboration. This evaluation process includes a two-way interaction between the applicant and society. New universities again stand out by only mentioning the aspect of collaboration in one instance.

Disciplinary View—Variation in Degrees and Types of Societal Collaboration

When comparing disciplinary differences, there is notable variation in the extent of societal collaboration, with specific disciplines discerning distinct patterns. Moreover, the types of merits that are valued also demonstrate wide-ranging variations across disciplines. In the humanities, collaboration with the surrounding society, especially popular publishing, is frequently mentioned as an add-on (such as “in addition to,” “as well as,” “also”) to the applicants’ stated skills. In contrast, the social sciences have more elaborate evaluation criteria, often with a higher degree of involvement, mentioning which areas of the surrounding society and what types of involvement (both one-way and two-way activities) are included. In these areas, societal collaboration is mentioned as a scientific and/or pedagogical merit, emphasizing pedagogical merit in the humanities and scientific merit in the social sciences. In law, with three guideline documents, there is an emphasis on pedagogical merits. The sole economics guideline that addresses collaboration only mentions it in an unspecified manner within a checklist.

The degree to which societal collaboration is recognized within the natural sciences/technical areas and the medical faculties varies, from not being considered at all to being given rather elaborate attention. In one medical sciences guideline and

one technology guideline, specific criteria for what is regarded as a more elaborate collaboration are found. Furthermore, pedagogical and administrative/other merits are mainly emphasized in all the guidelines in these subject areas. Notably, societal collaboration is not considered a scientific merit in any of the medical guidelines and only in one of the natural sciences/technical guidelines.

In the guidelines encompassing the entire HEI (“ALL”), particularly university colleges, a diverse range of merit types is identified, with a notable emphasis on pedagogical merits. This aligns with the earlier observation that there is a shared emphasis on pedagogical merits for fostering societal collaboration across all disciplinary domains. At a specific HEI, the guidelines incorporate a criterion that assesses the quality of collaboration, establishing a scale to determine what is deemed “good” quality. The instructions provided to referees explicitly mention this criterion:

Experience of collaboration with the surrounding society and/or other HEIs about research/pedagogical/artistic/ or “other” skills” [...] “is to be assessed on a 5-grade scale from 0=insufficient skill, 3=good skill [and] 5=excellent skill. The assessment must be commented on. (GUI HKR ALL)

Few HEIs Meet Explicit Intentions in the Strategy to Work with Collaboration in Merit Processes

Almost half of the HEIs (12) mention explicitly in the collaboration strategy that they intend to work with collaboration connected to academic merit. However, only four HEIs realize these intentions by clearly including collaboration features in their guidelines for docentship. Among these, the universities of Gothenburg, Halmstad, and Agricultural Sciences express well-developed collaboration visions and reflect upon these in the promotion assessment criteria. Stockholm University, the fourth HEI in this group, mentions that collaboration is considered when merit is awarded. This intention is fulfilled as collaboration is mentioned in the guidelines for all faculties at this broad comprehensive university.

Most of the HEIs (6) that mention collaboration related to academic merit in their strategies only briefly note collaboration in the promotion guidelines or reveal significant variation across guidelines for specific disciplines. One example is Dalarna University, which mentions research information as part of pedagogical qualifications:

[I]t would be also be [sic] of merit for the applicant to have authored teaching materials or research information. (GUI HD ALL) (original in English)

Another example is Linköping University, which clearly states that collaboration should be merited. Three of the faculties at the university do mention collaboration connected to pedagogical merits, for example:

Activities whereby scientific results have been made available to the wider public, the business sector, or other activities in addition to universities and colleges. (GUI LIU NA/TE)

However, collaboration is not mentioned at all in the guidelines of the faculty of medicine at this university.

As for the remaining two universities, Karlstad and Uppsala, the strategic intentions are relatively weak. In the case of Karlstad University, there is no indication of collaboration-related features in the guidelines, although the strategy clearly states that collaboration is considered for merit. Uppsala University's strategy explicitly highlights that collaboration is connected to academic merit. However, this is not reflected in the guidelines, which do not mention collaboration at all. Societal collaboration is only mentioned briefly in the guidelines for the humanities faculty and as part of the pedagogical qualifications for the law faculty.

Concluding Discussion

In this study, we explored the alignment between the expressed intention of HEIs to matter and the assessment of individuals to matter. We approached this aim by comparing the societal collaboration strategies of the HEIs and the guidance for merits regarding docentship. Our analysis showed that strategies' visions of societal collaboration were rarely reflected in promotion guidelines. There was significant variation regarding how the guidelines dealt with collaboration merits. Only six of the 29 HEIs in our study showed alignment between the ambitions and perspectives on collaboration as expressed in the strategies and the extent and form in which collaboration was included in the guidelines. Although a great majority of the HEIs expressed bold strategies, only three matched these expressed ambitions with guidelines that reflected that ambition in terms of width and depth of perspectives on collaboration with criteria for what constitutes good collaboration.

The relatively infrequent acknowledgment of collaboration merits in guidelines and the misalignment of the strategies we reveal in this study may be attributed to various tendencies in the higher education system that the literature highlights. First, our results may be a consequence of the fact that the intentions in the strategies have been translated, interpreted, and negotiated by various individuals in different contexts and from different scientific disciplines whose priorities may differ from those set out in the strategies. For example, this may include the negotiation that takes place when the diverse institutional and collegial value systems are to be united in the guidelines. Indeed, despite existing notions that a strategy sets the organization's direction, the direction and strategic intent of an HEI change during the internal implementation process (Thoenig & Paradeise, 2018). Our results may also be a consequence of the significant decoupling between the task of collaboration that is chiefly assigned to administrative functions and the traditional duties of teaching and research that are more the direct concern of faculty (Perez Vico et al., 2017). Nonetheless, our study shows that societal collaboration is deprioritized in the guidelines compared to the strategies. It thus supports previous observations in Sweden indicating that collaboration is generally overshadowed by scientific and pedagogical skills in the criteria for employment and promotion (Hammarfelt, 2021; UKÄ, 2022),

and previous research from other geographical contexts showing that various actors within HEIs overlook collaboration on the operational level (Alperin et al., 2019; D'Este & Perkmann, 2011). Also, the infrequent acknowledgment of collaboration merits might be due to the perspective that the docentship should primarily reflect scientific merit, a widespread perspective among European universities (Musselin, 2004). However, this perspective contradicts the widely held view in Swedish HEIs that collaboration is an integral part of research activities. Hence, collaboration should be expected to be acknowledged even with a research-focused perspective on the docentship.

While these results can be seen as a sign that HEI management has failed to implement its strategic intentions, the governing function of university strategies is ambiguous (Thoenig & Paradeise, 2018). The patterns we uncover in this study are thus not necessarily unique to collaboration, nor do they essentially mean that collaboration is deficient. Drawing such conclusions would require further research.

Further, while significant variation exists in how collaboration merits are considered and in the degree to which they are employed in the guidelines, some patterns still emerge. Comprehensive and specialized universities emphasize the importance of societal collaboration in their guidelines by incorporating it as a basis for evaluation in various ways. Similarly, university colleges frequently highlight collaboration activities' significance in their guidelines as essential criteria for evaluating docent merits. In contrast, new universities tend to consider collaboration merits to a lesser extent; when they do, they more often see them as merits detached from research and education. This result may be a sign that newer universities in Sweden have a greater need to assert their research excellence. In contrast, university colleges have focused more on collaboration, and broad comprehensive universities can focus more on collaboration based on their more proven research excellence (Benner & Sörlin, 2015). This, however, needs to be further empirically investigated.

Moreover, we detected some disciplinary differences in how collaboration merits are considered. The humanities, social sciences, and law are more oriented toward everyday life. Therefore, it is not surprising that greater emphasis is placed on collaboration or third mission activities as scientific and pedagogical merits in our results. Their mission is also considered to be that of "public intellectuals" and thus also to have intrinsic (own) value. We also note that there are guidelines in the medical and technological disciplines that include criteria for what is considered a more elaborate collaboration. This could reflect that the nature of the knowledge in these disciplinary groups is more hinged on quantities (Becher, 1994), which might be echoed in the corresponding merit system in those fields. In these disciplines, societal collaboration is rarely considered a scientific merit. However, no disciplinary research domain stands out as particularly bold regarding promotion guidelines related to collaboration, nor as particularly aligned with their strategy.

Additionally, although nearly all HEIs emphasize collaboration as an integral component of their research and teaching strategies, we observed substantial variation in the specific sections within the guidelines that address collaboration. Certain HEIs incorporate collaboration criteria within education and research qualifications, while others include it in neither. Furthermore, some HEIs have a dedicated section for

collaboration in their guidelines, while others may group it with generic transversal abilities. This ambiguity reflects previous research suggesting that some tasks can be integrated and others cannot (Reymert & Thune, 2023).

This diversity may also indicate experimentation since collaboration merits are a relatively new feature in the promotion and appointment criteria in general, and no consensus on standardized guidance has yet been reached (Bergstrand et al., 2021). It also echoes previous research showing that HEIs have different understandings of societal collaboration shaped by local policies, regional characteristics, resources, institutional setups, and various stakeholders (de la Torre et al., 2019; Kitagawa et al., 2016; Rose et al., 2013). Since HEIs have been described as slow-moving (Gornitzka, 1999), we can expect that it will take considerable time during the assessment process, potentially resulting in collaboration skills being overshadowed by other aspects of academic qualifications that are accorded more substantial and tangible prominence in the guidelines. If HEIs are serious about their intentions to make collaboration a stronger and integrated part of HEIs and the academic task, considerable work remains to be done in determining how best to capture and assess collaboration merits. Such actions will better equip HEIs to meet society's increasing expectations to generate societal impact and to matter in the development of a more knowledge-based society and sustainable future.

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