



SMART ACCELERATORS FOR CULTURAL HERITAGE ENTREPRENEURSHIP (SACHE)

# THE SACHE-CROSS-SECTORAL PARTNERSHIP NAVIGATOR



## PREAMBLE

SACHE is a unique learning opportunity. Providing for what one may understand as a rudimentary form of action research, SACHE allows to study in situ the development of cross-sectoral partnerships at the junction of cultural heritage and the creative industries across Europe. It is in this vein that the methodology has been developed, providing immediate, practical guidance to the SACHE partners while at the same time allowing for new insight and knowledge to be developed that will be of use beyond the remits of the project itself.

The methodology presented here takes the form of what is being referred to as the SACHE-Cross-sectoral Partnership Navigator or short: SACHE-Navigator. The navigator is to be understood as a prototype for a general process description that serves the purpose of guiding and supporting the establishment of collaborative enterprises between cultural operators and creative industries both within and beyond SACHE. The process described extends from the initial phase of scoping the field to the maturation phase of pitching new ventures and thus captures a large section of the value creation process.

The piloting of the SACHE-Navigator (by each partner applying the methodology written into it) constitutes part of an iterative (research and development) process that is informed by the individual experiences of the parties involved. This is to say that each partner should deploy the navigator in recognition of his/her own local circumstances and particular innovation ecosystem demands. Experiences emerging from the situated application of the navigator are then to be documented by the partners (-> template), allowing for their analysis to be recognised in the final iteration of the tool before it will be publicised, addressing the “outside world”.

SACHE ought not to be an end in itself but help to further our understanding of cross-sectoral partnerships and the mechanisms that might help to stimulate entrepreneurial activity across the dynamic and ever evolving fields of cultural heritage and creative industries. It is for this reason that the SACHE-Navigator is more than a plan to action but a concept to be tested and refined in pursuit of an elaborate guideline addressing an audience of economic development agents across Europe.





## INTRODUCTION

The proposed SACHE methodology aims at translating the Service Portfolios developed in WP T2.1 into a practical process scheme. The scheme works to support the partners in their planning and realisation of the activities subsumed under WP T3.2 (matching, mentoring, and pitching) whilst providing for the level of comparability in the group's actions that is necessary for its output to be evaluated as part of WPT4. Given its guiding character, the scheme is being referred to and shall be discussed publicly as SACHE Cross-sectoral Partnership Navigator. **The SACHE-Navigator is defined here as a tool that allows its user (economic development agents, cultural operators and others both within SACHE and beyond) to clarify his/her position along the process of establishing cross-sectoral partnerships at the junction of cultural heritage, the creative industries and other sectors (e.g. new technologies) and direct a suitable course of action to the end of stimulating entrepreneurial activity.** To be clear, the navigator does not constitute a deviation from or extension of WP T3 but a specification of the methodology as required (cf. D.T3.1.3).

Moving beyond the Service Portfolio Guidelines, the navigator integrates the experiences shared during the Coaching Actions (D.T3.1.1) and Transnational Workshop (D.T3.1.2) in terms of a structured

collection of points to consider, offering a repertoire of possible responses or rather solutions. The scheme is intended to be applied within the specific operational context of the partners and yet it offers an overarching perspective on the flow of capacity building activities as demanded by the SACHE work programme.

This proposed navigator is to be understood as a living document that is not complete as of now but requires to be enriched by the partners' experiences as they work their way through the individual phases incorporated in the scheme (and as spelled out in WP T3.2). Also, the key performance indicators (KPIs) remain to be specified as part of the ongoing developmental process (in the domain of WP T4) and the implementation of a corresponding evaluation scheme. Such elaboration of evaluative measures (including qualitative measures) is critical for the operationalisation of the decision model (navigator) to happen.

Eventually, the navigator will take the form of a generic tool that allows to be used well beyond SACHE for initiating and supporting collaborative projects at the junction of cultural heritage, creative industries, and other sectors.



## HOW TO READ THE NAVIGATOR

In order to better understand what the SACHE methodology (read: navigator) is, it might help to appreciate what it is not. Our methodology is not a project brief that tells our partners precisely what kind of events to run, when and how. A methodology is not to be confused with a method. While one is to do with the procedural aspect of achieving something (method), the other is to do with the contextual framing of such procedure (methodology). A methodology clarifies the circumstances under which certain actions are due to follow (framing of a narrative). It provides answers as to why a

particular method or set of methods is chosen to approach or accomplish something, clarifying the author's fundamental assumptions about and outlook on whatever the subject of inquiry might be. In the case of SACHE the subject of inquiry is the contextual frame that may or may not help to stimulate entrepreneurial activity around cultural heritage. The design of such frame requires, as our workshops have shown, methodical plurality and a local response to the particular challenges faced. There is no such thing as a univocal approach to incentivise the formation of local structures of value creation.

## HOW TO USE THE NAVIGATOR

The navigator offers a unique approach to both writing and presenting a methodology: not in the form of a lengthy, prosaic document but an easily accessible rundown of a systematic procedure through which to organise the contextual frames necessary for an intensified cross-sectoral entrepreneurial engagement with the resources of cultural heritage. It is to serve as a navigational tool that allows its users (here: partners) to position themselves within the process of establishing such frames, deliberate possible routes of action and

decide on the next steps. The navigator follows a heuristic approach and confronts its user with a set of questions which by answering provide guidance as to which activities to pursue (an if/then-logic is applied). The sequence of activities is broken down into four phases (i. initiation, ii. incubation, iii. acceleration and iv. emancipation), with phases (ii), (iii) and (iv) echoing what is termed matching, mentoring and pitching in the SACHE application form (A.T3.2).



## THE ROLE OF WP T3 LEAD

WP T3 centres around the implementation of the SACHE strategy, drawing upon the material developed under WP T1 and T2. It is therefore a crucial step in the process of incentivising and enabling cultural heritage driven entrepreneurial activity within creative economy arena. The role of the lead of WP T3 more specifically is ...

- 1) to offer a frame (as manifest in the navigator-tool) for such developmental, capacity building activities undertaken both individually by each partner and collectively as a group of inquirers on a transnational level,
- 2) to moderate and document the ongoing process in a results-oriented fashion, and
- 3) to harmonize the outcomes from the use of the navigator with the expected project targets, indicators and outputs.

## THE CONSTITUTIONAL ELEMENTS OF THE NAVIGATOR

In the process scheme two different lenses are brought together: a time lens and an activity lens. It is at the crossing of both lenses that the user of the navigator is given critical cues as to which courses of

action to follow, considering both the partner's local circumstances and the overall SACHE work programme. Those two lenses can be summarised as follows:

### Time lens: project phases (enactive steps)

- 1 INITIATION:** Identifying potential partners and topics; initiating and coordinating dialogue; clarifying subject of inquiry; establishing common understanding of problematic; brainstorming areas of intervention; locating key actors (cf. UNIVE project phase 1: consciousness)
- 2 INCUBATION:** Bringing together key actors; refining issues/problem areas to be addressed; forming project teams; defining common goals; developing first ideas; detailing project design (cf. UNIVE project phases 2 and 3: vision and inspiration + workshop/lab)
- 3 ACCELERATION:** Experimenting, elaborating ideas and prototyping possible solutions; mentoring of project teams; pre-commercial development (cf. UNIVE project phase 4: project work + documentation)
- 4 EMANCIPATION:** Ready for market; pitching new venture; growing network; establishing sustainable collaboration structures (cf. UNIVE project phase 5: pitching event)



## ACTIVITY LENS: RESPONSE REPERTOIRE

The realisation of cross-sectoral partnerships is helped by a series of orchestrated activities. Those activities do not necessarily follow a particular sequence (for that they are to be designed and organised in response to the local circumstances each partner/organisation is faced with) nor are they in any way fixed in terms scale and scope, and yet they are likely to show certain degrees of regularity in their appearance along the process of enacting the kind of environments conducive to cross-sectoral work. They may best be understood as a set of tools that are available to be employed if needed across the different phases of the project, i.e. initiation, incubation, acceleration and emancipation. To be clear, those activities are not compulsory and by no means limited to the list provided but they are to be understood as possible courses of actions that might help to realise what can be described as SACHE core activities: matching, mentoring and pitching (cf. A.T3.2). Featuring in the scheme (SACHE-Navigator) are the following activities:

**Scouting & research:** Gathering insight critical to the initiation and/or advancement of talks between potential collaboration partners. Such insight may include information on existing networks and collaborative links, issues of common interest, places and spaces, socio-cultural and technological developments etc.

**Stakeholder mapping:** Becoming entangled in social situations (communities of interest, inquiry and/or practice), developing a sense of people's agency in the process and making sure that critical competences and levels of representation are aligned.

**Curation of settings:** The stimulation of cross-sectoral, entrepreneurial activity requires some form of place- and space-making (be it in the physical or non-physical realm). Those spaces ought to be defined by their purpose (ranging from informal exchanges to large-scale prototyping events) to accommodate the individuals/organisations involved and the very practices that are to be staged.

**Rules of engagement:** As people come together, subscribing to a process of shared inquiry, these encounters are guided by a set of locally established principles and rules of engagement. These organising frames may take various forms and are constructed through materials such as invitations, briefings, agendas, introductory notes etc.

**Managing expectations:** Given the polyphonic character of cross-boundary projects with a range of perspectives being typically brought together and organised around a shared process of inquiry, deliberation and/or work, managing expectation (such as clarifying the entrepreneurial character of SACHE) and establishing some ground is crucial activity throughout the common scheme.

**Invitation of project ideas:** It is typically a particular subject matter, a particular problematic/concern or opportunity that brings people together and drives them to embark on a shared path of inquiry, leading to the formation of social structures mentioned above. Finding out what those are, how to respond and which ideas to take forward, is a crucial step that ought to be facilitated (for instance through different ideation tools such as brainstorm cards, opposite thinking, collaborative sketching etc.)

**Forming coalitions:** Building relationships is instrumental to the realisation of entrepreneurial endeavours. Starting a new venture is a collaborative effort which requires the purposeful combination of resources and competences. This is typically accomplished by forming multidisciplinary project teams and becoming gradually entangled in what might be understood as communities of interest. Such formation of project teams should be facilitated by means of curation.

**Allocation of resources:** In the absence of central funding or support, the potential collaborators may be required to organise alternative resources to fuel the project and development of ideas. Such alternative resources might include financing, knowledge,



equipment, spaces or indeed any other form of commitment, invested on the premise of a likely return in the future.

**Coaching:** Building on activity T2.3 (within SACHE) and insight gathered from interactions with key target audiences (cultural operators, creative practitioners/entrepreneurs, public authorities etc.), facilitators are to help the actors trained as well as those unfamiliar with the general thrust of the cross-sectoral undertaking (be it SACHE or any other cross-sectoral project) understand the scope of the project and how it might work out.

**Mediation:** Shared processes of work across boundaries (be they systemic, sectorial, functional, culturally or otherwise) are often hampered by incongruent forms of communication (resulting from different institutional logics, basic assumptions,

world views etc.). In order to allow for the shared production of insight, knowledge and new ideas (leading to new products, services, processes, ...), it is important to close/reduce such gaps by introducing and employing what one might understand as a multilingual facilitator, competent in those different fields pertinent to the project. That is, people who are able to form linkages between the different actors involved and assist the development of a shared understanding and body of knowledge.

**Management:** With the complexity of projects building up as they mature, it is advisable to establish some preliminary form of organisational and managerial structure early on. This also includes the handling/managing of IP as participants embark on a process of shared exploration, contribute to the production of IP and possibly (ideally) become involved in the formation of a new (business) venture.



NAVIGATOR	SACHE REFERENCE	SACHE TIMEFRAME
<p><b>INITIATION:</b> Identifying potential partners and topics; initiating and coordinating dialogue; clarifying subject of inquiry; establishing common understanding of problematic; brainstorming areas of intervention; locating key actors (cf. UNIVE project phase 1: consciousness)</p>	n/a	March-April 2021
<p><b>Having solid understanding of existing „ecosystems“/networks relevant to the envisaged partner community involved? Having a valid map of stakeholders?</b>            No: Start out (re-)searching and mapping the landscape of potential partners and/or issues to be engaged with.            -&gt; <a href="#">Scouting &amp; Research</a></p>		
<p><b>Are decision makers within the different stakeholder groups known/identified?</b>            No: Make sure that partner structures/institutions are adequately represented by the people you are in contact with.            -&gt; <a href="#">Stakeholder mapping</a></p>		
<p><b>Having knowledge about stakeholders' expectations, interests and situation?</b>            No: Develop a tailored questionnaire and initiate biliteral exchange between you and the different partners.            -&gt; <a href="#">Curation of Settings</a>            -&gt; <a href="#">Rules of engagement</a>            -&gt; <a href="#">Mediation</a></p>		
<p><b>Stakeholder specific key terms defined and mutual understanding of the other's "language" ensured?</b>            No: Create adequate formats and learning opportunities to develop a common language across the project team and possibly wider stakeholder group (workshop, "dictionary" etc.).            -&gt; <a href="#">Mediation</a>            -&gt; <a href="#">Coaching</a></p>		
<p><b>Having sufficient resources (financial/human) for incubation/acceleration period?</b>            No: Clarification of needs and options; clarification of stakeholders' contribution and the process to be acted out.            -&gt; <a href="#">Allocation of resources</a></p>		
<p><b>Focus on business models and regulatory framework/intellectual property issues clarified?</b>            No: Make sure that all partners have a common understanding of the projects entrepreneurial character.            -&gt; <a href="#">Managing expectations</a>            -&gt; <a href="#">Curation of settings</a>            -&gt; <a href="#">Invitation of project ideas</a>            -&gt; <a href="#">Coaching</a></p>		
<p><b>Efficient concept for documentation and process control established?</b>            No: Establish a standardised framework for documentation of meetings, agreements, milestones etc.            -&gt; <a href="#">Management</a></p>		
<p>-&gt; Courses of action: to be defined by the partners/fill in template<sup>2</sup></p>		





NAVIGATOR	SACHE REFERENCE	SACHE TIMEFRAME
<p><b>INCUBATION:</b> Bringing together key actors; refining issues/problem areas to be addressed; forming project teams; defining common goals; developing first ideas; detailing project design (cf. UNIVE project phases 2 and 3: vision and inspiration + workshop/lab)</p>	Matching	March-August 2021
<p><b><i>First project ideas/ideas for collaborative projects existing amongst the partners?</i></b>            No: Organize barcamp/open conference designed to specify/refine issues or problematic areas.            -&gt; Curation of settings            -&gt; Rules of engagement            -&gt; Invitation of project ideas            -&gt; Forming coalitions (project teams)            -&gt; Coaching</p>		
<p><b><i>Adequate space for meetings and ideational activities ensured?</i></b>            No: Identify adequate locations and involve partners – they should make contributions in whichever way possible (provision of space, expert knowledge, funding etc. but also in terms of sharing ideas/thoughts, articulating preferences etc.).            -&gt; Curation of Settings            -&gt; Coaching</p>		
<p><b><i>Mutual interest and curiosity amongst the partners established?</i></b>            No: Organise informal events, “excursions” to partners’ institutions/structures etc.            -&gt; Curation of Settings            -&gt; Mediation            -&gt; Coaching</p>		
<p><b><i>Informal events planned?</i></b>            No: Make sure that enough “informal” exchange between the partners can take place in order to establish trust and an effective as well as efficient form of communication across different “cultures” of thinking and acting.            -&gt; Curation of settings</p>		
<p>-&gt; Courses of action: to be defined by the partners/fill in template<sup>2</sup></p>		



NAVIGATOR	SACHE REFERENCE	SACHE TIMEFRAME
<b>ACCELERATION:</b> Experimenting, elaborating ideas and prototyping possible solutions; mentoring of project teams; pre-commercial development (cf. UNIVE project phase 4: project work + documentation)	Mentoring	August-October 2021
<b>Experimental space available?</b> No: Allocate resources to establish setting that invites experimental work and prototyping of possible solutions. -> Allocation of resources -> Curation of settings		
<b>Management structure clarified?</b> No: Set up operational and organizational structure. -> Management -> Coaching		
<b>Trustful communication established?</b> No: Moderate an open discussion and clarify goals and/or points to consider by the partners. -> Mediation -> Coaching		
-> Courses of action: to be defined by the partners/fill in template <sup>2</sup>		

NAVIGATOR	SACHE REFERENCE	SACHE TIMEFRAME
<b>EMANCIPATION:</b> ready for market; pitching new venture; growing network; establishing sustainable collaboration structures (cf. UNIVE project phase 5: pitching event)	Pitching (read: project presentation day)	October-December 2021
<b>Conclusive and operationalisable knowledge about funding opportunities and structures in different „biotopes“?</b> No: Establish a detailed and project-specific overview of options including descriptions of formats, processes, contact persons etc.; if necessary, put enough effort into research! -> Research & Scouting -> Allocation of resources		
<b>Roles and conditions for long-term co-operations clarified?</b> No: Discuss openly with the partners possible perspectives, forms of involvement, and your/their future role. -> Management -> Coaching		
-> Courses of action: to be defined by the partners/fill in template <sup>2</sup>		



## SACHE-NAVIGATOR APPLIED

In order to help better understand the use of the navigator, the initial phase (Initiation) will be exercised taking the case of BayInno as an example.

NAVIGATOR	SACHE REFERENCE	SACHE TIMEFRAME
<p><b>INITIATION:</b> Identifying potential partners and topics; initiating and coordinating dialogue; clarifying subject of inquiry; establishing common understanding of problematic; brainstorming areas of intervention; locating key actors (cf. UNIVE project phase 1: consciousness)</p>	n/a	March-April 2021
<p><b>Having solid understanding of existing „ecosystems“/networks relevant to the envisaged partner community involved? Having a valid map of stakeholders?</b>            No: Start out (re-)searching and mapping the landscape of potential partners and/or issues to be engaged with.            -&gt; Scouting &amp; Research: BayInno has access to an expansive network of creative practitioners/entrepreneurs, cultural producers, public support agencies, trade associations and policy makers/administrators; yet its connections into the fields of cultural heritage and new technologies were to be further developed. To this end BayInno pursue daheuristic research approach, roamed the intellectual landscape (desk research) and followed up on cues from within the existing network to expand its reach into the other key target audiences.</p>		
<p><b>Are decision makers within the different stakeholder groups known/identified?</b>            No: Make sure that partner structures/institutions are adequately represented by the people you are in contact with.            -&gt; Information: In order to identify key individuals within the target audiences – BayInno undertook a series of exploratory talks to solidify the group of potential partners.</p>		
<p><b>Having knowledge about stakeholders’ expectations, interests and situation?</b>            No: Develop a tailored questionnaire and initiate biliteral exchange between you and the different partners.            -&gt; The emerging group was brought together in the course of a two and half hours a coaching session or rather scoping exercise(setting) to learn more about each other’s interests, expectations and aspirations. The exercise was structured around a code of practice (rules of engagement) and set of questions (What brought you here? How do you relate yourself to the overall topic? What is it that you are hoping to get out of this? Etc.) that helped the participants to gather their thoughts and develop a sense of agency in the process (mediation).</p>		
<p><b>Stakeholder specific key terms defined and mutual understanding of the other’s “language” ensured?</b>            No: Create adequate formats and learning opportunities to develop a common language across the project team and possibly wider stakeholder group (workshop, “dictionary” etc.).            -&gt; Given the participants’ diverse backgrounds (cultural heritage, cultural management, the arts/creative practice, academia, new technology etc.) barriers of different sorts (culture, language, personality etc.) had to be mitigated. Participants were encouraged to subscribe to a process of shared inquiry (working as a boundary object), with the process having been facilitated by a multilingual ambassador able to lift the conversation to a level of shared understanding (mediation).</p>		



NAVIGATOR	SACHE REFERENCE	SACHE TIMEFRAME
<p><b>INITIATION:</b> Identifying potential partners and topics; initiating and coordinating dialogue; clarifying subject of inquiry; establishing common understanding of problematic; brainstorming areas of intervention; locating key actors (cf. UNIVE project phase 1: consciousness)</p>	n/a	March-April 2021
<p><b><i>Having sufficient resources (financial/human) for incubation/acceleration period?</i></b>            No: Clarification of needs and options; clarification of stakeholders' contribution and the process to be acted out.            -&gt; Allocation of resources: Given the absence of tangible resources, the group found that it had to make alternative arrangements for building a suitable cross-sectoral work setting and driving individual projects. Those arrangements are expected to include the provision of space, expert/technical knowledge, materials/equipment etc. How this will materialise is yet to be seen.</p>		
<p><b><i>Focus on business models and regulatory framework/intellectual property issues clarified?</i></b>            No: Make sure that all partners have a common understanding of the projects entrepreneurial character.            -&gt; Participants were sensitised at various stages throughout phase one to the fact that SACHE pursues two aims: enacting the kind of exploratory environments conducive to cross-sectoral work at the junction of cultural heritage and creative industries (+ new tech) and by doing so stimulating entrepreneurial activity manifest in the formation of new, cross-sectoral ventures.</p>		
<p><b><i>Efficient concept for documentation and process control established?</i></b>            No: Establish a standardised framework for documentation of meetings, agreements, milestones etc.            -&gt; Management: In order to capture what was discussed/developed during the workshop, it was agreed that findings were to be written up. Beyond those local arrangements SACHE demands a more structured approach to documentation, which is catered for by the template mentioned that goes along with the navigator.</p>		
<p>-&gt; Courses of action: to be defined by the partners/fill in template<sup>8</sup></p>		

Die Bayern Innovativ GmbH ist seit ihrer Gründung im Jahr 1995 wichtiger Bestandteil der Innovationspolitik des Freistaats Bayern. Vision der Bayern Innovativ GmbH ist ein Bayern, in dem jede tragfähige Idee und Technologie zur Innovation wird.

Neben der Organisation von Netzwerken in fünf Spezialisierungsfeldern – Digitalisierung, Energie, Gesundheit, Material & Produktion und Mobilität – bietet Bayern Innovativ seinen Kundinnen und Kunden ein umfangreiches Beratungsangebot. Dieses umfasst Dienstleistungen für ein erfolgreiches Technologie- und Innovationsmanagement, zum Patentwesen, zu Fragen der Kultur- und Kreativwirtschaft, zur Teilnahme an internationalen Innovations- und Kooperationsprojekten und zur Projektförderung.

Bayern Innovativ ist Projektträger mehrerer bayerischer Förderprogramme und navigiert als Förderlotse zu weiteren Förderprogrammen des Freistaats Bayern, des Bundes und der EU.

Für einen optimalen Wissenstransfer organisiert Bayern Innovativ hochkarätige Kongresse, Arbeitskreise, Workshops, Coachings und weitere Events. Der „Gemeinschaftsstand Bayern Innovativ“ öffnet Unternehmen und Forschungseinrichtungen kostengünstig das Tor zu internationalen Leitmesse.

Im Fokus unserer Aktivitäten stehen insbesondere kleine und mittlere Unternehmen (KMU) und Start-ups.

[www.bayern-innovativ.de](http://www.bayern-innovativ.de)