

Coming Together

NAVIGATING THE INNOVATION JOURNEY

This 'How to Guide' explores the co-innovation process from the inception of an idea. An idea can be generated in response to an opportunity or challenge that requires action.

The multi-actor project LIAISON (Better Rural Innovation: Linking Actors, Instruments and Policies through Networks) has been studying ways of speeding up innovation in agriculture, forestry and related sectors. This How to Guide explores the early phases of **ideas generation**, ways of **accessing networks** to form relationships in order to create a co-innovation partnership, and relevant considerations around **funding**.

IT BEGINS WITH AN IDEA

What might the trigger be for a novel idea that would benefit from co-innovation?

An idea for a co-innovation activity does not appear out of nowhere but until now insufficient attention has been given to the processes that precede idea formation. For example, an idea may originate from:

- An individual actor (person or organisation)
- A formal partnership such as a project consortium
- An informal partnership such as a cluster or network
- A call for proposals on a certain subject by a funding

In other words, the formation of the idea may precede or follow that of the partnership. LIAISON

found in the case studies it explored that ideas can be triggered as a result of the following circumstances:

- Identified by an individual stakeholder in response to their own need or a technical/societal need/challenge or opportunity (e.g. a farming business such as [Magners Farm](#))¹
- Identified by more than one stakeholder through sharing information and knowledge on a topic of common interest (e.g., [Arena Skog](#))²
- Brokered between stakeholders by an innovation support programme such as the [RISS Programme](#)³
- As the next steps in an existing or completed co-innovation activity (including commercialising an 'invention' such as in the H2020 project [TRUE](#))⁴

Whatever the impetus for the idea, it is how the group agrees to act on the idea which is key. Before taking an idea forward time is likely to be spent on evolving the idea and discussing potential options to take it forward with others. This initial stage of interrogating an idea will present internal challenges that can help refine the idea and identify better outcomes or the way forward. At this stage it is also possible to scope out who else is already

¹ liaison2020.eu/casestudy/magners-farm/

² liaison2020.eu/casestudy/arena-skog

³ liaison2020.eu/casestudy/riss/

⁴ liaison2020.eu/casestudy/true/

interested in this topic, active in this area and the potential of joining in with an existing group.

How can others be engaged around the idea?

The start of any co-innovation activity requires motivation and a shared degree of curiosity, desire to co-operate, and/or wish to make a change or profit in business. Coming together around shared goals will help actors agree on the best way to proceed. This will require developing a strategy and considering the necessary infrastructure to make it happen. There is a wealth of knowledge and expertise that can be drawn upon in the following ways (depending on the desires of the individual or group):

- Developing a partnership from existing networks or via innovation brokerage
- Buying in knowledge and expertise to help with developing the idea
- Formalising an existing informal partnership to co-operate more efficiently
- Accessing facilitation support to bring an idea to fruition and develop or formulate a plan

EXPLORING NETWORKS TO FIND THE RIGHT PARTNERS

How best to connect with innovation networks

There are numerous benefits to joining in with co-innovation projects and collaborating with innovation networks in a range of ways. Innovation networks exist in rural development, sustainable agriculture and forestry. They bring together various stakeholders to share knowledge and jointly develop solutions to the challenges and opportunities experienced. These networks take many forms of scale and formality and consist of 'producers, customers, experts, NGOs, SMEs, local administrations, as well as official researchers and extension officers/advisors, that are mutually engaged with common goals for sustainable

agriculture and rural development – co-operating, sharing resources and co-generating new knowledge.

Gaining access can sometimes be difficult as you firstly need to identify and find the right networking opportunities. When a consortium is formed around a funded project it can be challenging for smaller organisations or less connected individuals to hear about opportunities or get inside the circle when planning funding applications. LIAISON found examples of proactively seeking opportunities through funding calls to access networks. In the instance of one partner in the [Food Heroes⁵](#) project they specifically decided to engage as a way to gain access to other networks for future larger collaboration opportunities. One way to help identify upcoming opportunities that could lead to engaging with networks that develop consortium for funding applications is to liaise with National Contact Points for certain funding calls such as Horizon Europe. This funder also has a 'find a partner' section on its website to help with matchmaking around each call topic.

What are the benefits of participating in multi-actor projects?

Turning an idea into reality is hard work and – especially in complex projects such as Horizon Europe – identifying and engaging the right partners to develop an initial concept into a workable plan can make or break a project. Therefore, the first step will be to assess the benefits for any individual or organisation that wants to join in with a co-innovation projects both from their participation but also what they could bring to the group. LIAISON identified the following which apply across most multi-actor project scenarios:

- Access to broad networks (of people and organisations), including to other projects, as well as a diverse range of stakeholders across Europe (and globally)
- Smaller or less established organisations can benefit from participation in multi-actor projects through access to external funding, larger stakeholder networks, capacity building and enhanced reputation.

⁵ liaison2020.eu/casestudy/food-heroes/

What is the best way to define and identify who to engage with?

Identifying and connecting with the expected beneficiaries of the project or innovation at the outset will help to define the networks which need to be involved in the co-innovation activity for the best outcomes. Gaining insights from beneficiaries as part of the planning process will help to understand both the issues they want to address and their expectations, as well as any potential role they could have within the project to co-create outputs.

Measures need to be in place or action must be taken to ensure effective participation and patience with each other through the learning and co-innovation processes. The partnership, as well as the evaluators and funders, might consider actively including new and less experienced partners and stakeholders in consortium in to gain new insights and try new ways of working. Developing links with advisors in the agriculture, forestry and related sectors can be enormously beneficial in making connections and forging new relationships. The group will want to assess which connections will benefit the project most, especially where costs may be incurred – for example in working with advisors.

What are the most effective ways to engage with 'hard to reach' groups?

This can be challenging and there are reasons why certain groups are hard to reach. Finding a trusted broker or grassroots organisations can help to address and breakdown barriers for engagement. Fully exploring contacts within the wide range of networks forming around the co-innovation idea can help to find new collaborators who have never formally engaged in this type of activity before. If successful, it will require patience and clear processes to help these groups navigate and understand a potentially unfamiliar way of collaborating and engaging with others. It will also help to explore and understand how or if their motivations are different.

In the case of the [Tous Paysans⁶](#) project it was found that the trust that resulted from open, relational, structured and managed facilitation was an essential element to the healthy functioning of the group. It is from trust that the rest of the project was built and that difficulties were overcome.

The [Biokutatás⁷](#) project found that the benefits of innovative methods are that they motivate people. Dependency requires trust and compliance. Among committed stakeholders co-operation helps build trust and reduce risks.

Developing a strategy that commits to being fully inclusive from the outset can help to secure active participation of members that otherwise could be left behind or missed out and their crucial input never realised.

Accessing through another project can often depend on the openness or requirements of that group for broader engagement. In the case of an activity where a group is seeking competitive advantage they may be closed to outside input. In the case of some research projects there may be a real willingness or appetite to collaborate. For example the [ORGANIC PLUS⁸](#) project collaborated with the RELACS project on a webinar.

What is the best way to ensure effective partner engagement?

LIAISON has identified three specific layers of engagement to ensure the successful establishment of multi-actor consortium or project groups:



Figure 1 Elements to establishing a project group

⁶ liaison2020.eu/casestudy/tous-paysans/

⁷ liaison2020.eu/casestudy/biokutatas/

⁸ liaison2020.eu/casestudy/organic-plus/

In reality these three levels of interaction overlap during the co-innovation process as they are mutually dependent. LIAISON also identified that different types of funding affect and shape the way partnerships form; for example there may be criteria around eligibility of partners and/or activities, opportunities for commercialisation of the innovation, or obligations to disseminate. It is important to be alert to the impact funding requirements have on the forming, and ways of working, within the consortium.

How this can be effectively managed is explored in more detail in the *Connected Partnerships How to Guide*.

ACCESSING FINANCE AND INTERACTING WITH FUNDERS

What is the role (or function) of the funding body within multi-actor co-innovation projects?

LIAISON discovered differing experiences of case studies in their relationship, and level of engagement with, the funders (or funding bodies). For national or regional managing authorities, grant giving and paying agencies had a direct contact point for the group. For smaller scale projects LIAISON found that often a closeness developed with the funder and the group that extended beyond administrative and financial concerns to making a more proactive contribution to the project outcomes.

Building a relationship with the funder from the outset and maintaining good communication can help to enhance co-innovation projects and improve their ways of working. As a recipient of funding there will be requirements and guidance that needs to be met. Taking time to understand the internal structures of a funding body (agency) will help throughout and be particularly useful during a conflict or occasion when planned activities need to change. Gaining a mutual understanding of the

funder's requirements and vice versa can help create an effective working relationship.

What is the best funding option for the planned activity?

Not all multi-actor partnerships secure external funding to progress an idea or project. In LIAISON we found a wide range of examples including:

- a micro-finance business loan – [Magners Farm](#)⁹
- private or self-funding – [10Frame Beehive](#)¹⁰
- help from an innovation brokerage service to find a funding source which suited their capacities – [24hour hops](#)¹¹

This can be attractive to groups that do not readily have access to the resources needed to manage the reporting and measurement requirements of public and private funding sources especially as some funders have considerable requirements that can be difficult for organisations with less capacity or resources for reporting and evaluation measurement to access.

Alternatively, a member may be explicitly included in a partnership because they contribute funding. Funding via a bank or other loan sources may be sought, a public or private funding source may be lobbied for funding, or an offer of funding may be received from a funding programme (not in response to a call for proposals).

In other instances, a specific funding call is announced that matches the idea sufficiently to mobilise a partnership around a funding application. In fact, many ideas are only operationalised after funding has been awarded following their submission in the form of a project proposal that responds to published calls on general topics to which innovative ideas can be adapted. This can make it possible for the necessary infrastructure and resources to be put in place for the co-innovation activity to proceed.

⁹ liaison2020.eu/casestudy/magners-farm/

¹⁰ liaison2020.eu/casestudy/10-frame-beehive/

¹¹ liaison2020.eu/casestudy/24-hour-hops/

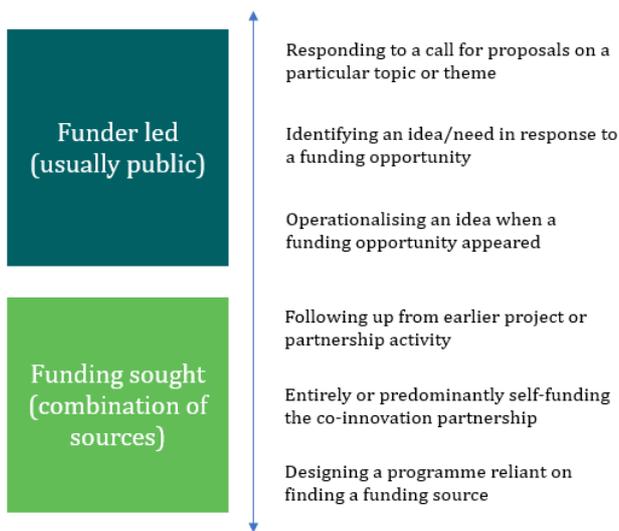


Figure 2 Factors influencing funding sources accessed for co-innovation projects

There can sometimes be a requirement to secure co-financing for the activity which also needs to be factored in and properly planned for. Choosing the right funder and funding conditions can have a significant impact on the success or otherwise of co-innovation partnerships.

Taking time to understand what is needed before applying for funding is important. Applications can be complex and time consuming, so making sure to take the time to interpret what is required and how it fits with the idea is time well invested. Sometimes this will require adaptation of the initial idea or making the decision to split the activity into stages while retaining a focus on the long-term goal. Groups should be careful not to sacrifice the project to match the funding; it might impact on the partnership's ability to deliver, including its composition, or constrain certain activities.

What support is available when seeking and identifying funding opportunities?

Multi-actor groups may be able to access a range of support to assist with identifying and accessing funding. The level and type of support, advice and guidance however differs significantly between funding bodies, funding periods and between regions.

The range of support available to access assistance might include:

- Funding brokerage to help to find the best suitable funding or funding mix
- Feedback on the design of the methodology or the workplan
- Pre-project administrative support
- Administrative support during the application process
- Communication and dissemination support
- Identifying and reaching out to networks to exchange ideas between projects
- Moderation in case of a conflict and evaluation of impact or evaluation of the innovation process

The level of support and access to funding varies across regions and funding type, so it is important to take time to understand what is available in a particular area. The funding conditions and eligibility criteria can also vary from one location or sector to the next so any funding source should be thoroughly investigated.

Getting the right process in place

When applying for a grant or drafting a business plan the consortium needs to consider who is best placed to lead the application. This individual may or may not be the same person who coordinates the co-innovation activity, it is a matter of finding the best fit for each role. Previous grant application know-how tends to be very useful for more complex grants and a successful grant application track record can result in trust from funding bodies. Participants will therefore want to look at the consortium members and evaluate the best people to take the lead, and if necessary look for experience from outside the group to support. Previous relations and good communication with the funding body, especially amongst lead partners, will give the consortium a better position when applying.

Do not assume that a first rejection means the end: the project proposal can be improved and resubmitted, especially if supported by a good contact point, or if good relations are in place with the funder.

TAKING THE LEAD

How to prepare for leadership roles in co-innovation

In taking on the role as leader for any multi-actor activity it is important to take into consideration the following factors when forming the best group for co-innovation:

- Recognise the resource and capacity differences between members, and be aware of how these might affect partners' performance as well as the performance of the consortium as a whole
- Identify how to most effectively pool existing resources
- Explore how to create opportunities for learning and capacity building among partners
- Consider how weaker collaborators might be able to benefit from the skills and experience of others to fully mobilise their own unique capacities
- Where appropriate, share the privileges and opportunities to take responsibility for tasks, as well as divide the role(s) of co-ordination among partners
- Establish a clear and realistic timeframe for the implementation of the delegation of co-ordination tasks
- Be alert to the potential impact of events or happenings external to the project might have on activities – positive or negative – and develop strategies to address them

It can be helpful to develop a framework for collaboration from the start (this is a requirement of some funders). This can be helpful in establishing a shared commitment among all participants to achieve the desired level of cohesion of the group at later stages. Good planning and coordination of the project, especially in the early development and funding application stage, is crucial to avoid or reduce the potential for later conflicts. It may also help to identify other opportunities and assets (e.g. opportunities for collaboration, additional funding sources) and anticipate bottlenecks (legal and bureaucratic barriers; stakeholders' lack of resources, capacities, or motivation) to project activities.

To find out more see the *Good Planning How to Guide*.

What are the likely bottlenecks to be prepared for?

Multi-actor partnerships should be prepared to encounter challenges and bottlenecks along the way. These include:

Funder requirements	<ul style="list-style-type: none"> ▪ Inflexibility of the grant agreement ▪ Unavailable project or policy officers ▪ Demanding reporting duties ▪ Administrative burden
Capacity to deliver	<ul style="list-style-type: none"> ▪ Performance issues ▪ Conflicting workloads ▪ Lack of confidence ▪ Staff changes ▪ Limited resources and capacities
Consortium dynamics	<ul style="list-style-type: none"> ▪ Failure to address differences/disagreements ▪ Lack of confidence by some partners ▪ Lack of motivation of some participants ▪ Diversity and inclusion challenges

MONITORING AND EVALUATION

When is it best to start measuring impact?

In terms of co-innovation, where the process is complex and dynamic, evaluation plays a central role in assisting decision-making at every stage. Evaluation activities are fundamental and useful beyond measuring the success or failure of an initiative: if these activities are carried out on a continuous basis, they can assist the group's decision-making, especially if there is a need to make changes to the plan or activities to ensure the desired impacts.

For the multi-actor partnership to demonstrate their success (either to themselves or to prove their value to funders) it is important to consider evaluation as a necessary aspect of innovation and to embed it into the planned activity. It is worthwhile being clear from the beginning what the consortium is aiming to achieve and the desired impact it wants to have, and

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to develop evaluation strategies to measure that impact throughout the lifetime of the project, so as to adjust its tactics if needed to meet its goals. Core partners should keep the necessity for evaluation throughout the activity in mind from the start. Establishing a clear monitoring and evaluation framework as a first co-ordination task helps to make sure it is embedded across all activity.

For more information on this topic see the *Coming Together How to Guide*

Evaluation is also an integral part of the funding process. A project's potential lead partners should examine the evaluation requirements of the funding bodies they intend to apply to, and give consideration from the outset into how they will meet these obligations and ensure the necessary resources are available.



LIAISON has compiled a handbook on participatory methods for co-innovation initiatives, and a Tool Box of evaluation and impact assessment tools.

About the LIAISON 'How to Guides'

LIAISON has developed five 'How to Guides' to support practitioners taking part in co-innovation initiatives. For the purposes of this guide a 'practitioner' is any actor seeking to take part in or provide direct support for partners in co-operation initiatives or projects which innovate through a participatory processes.

LIAISON (Better Rural Innovation: Linking Actors, Instruments and Policies through Networks) is a multi-actor project which has been funded within the EIP Agri, an initiative launched by the European Commission in 2012 with its goal of fostering competitive and sustainable agriculture and forestry that *"achieves more and better from less"*.

The interactive innovation approach brings together a diverse range of public and private innovation actors (farmers, advisors, researchers, businesses, NGOs etc.) with complementary knowledge and experience to appraise, gather, co-create and disseminate practical solutions to the real needs of farmers and foresters. These needs are driven by and derived from the real opportunities and day-to-day challenges faced by farmers, foresters and rural businesses. The innovations generated with an interactive approach can deliver solutions that are well adapted to circumstances and which are easier to implement.

- **Coming Together**
- **Good Planning**
- **Healthy Partnerships**
- **Connected Partnerships**
- **Achieving Impact**

These guides highlight what we have learned from **LIAISON's** activities and data collection. The aim is to help all that use them enhance the way they co-innovate in farming, forestry and rural development.

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