Best practices, lessons learnt and the next phase of ClusterXchange

09/11/2021

ClusterXchange Support Office

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Welcome and introduction

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Introduction of the ClusterXchange Support Office team

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Agenda

Time (CET)	Agenda
15:00 – 15:05	**Welcome & introduction** • Introduction of the speakers and moderators by the SO • Presentation of the agenda by the SO • Key opening notes from the European Commission
15:05 – 15:15	**A brief update on ClusterXchange** • Initial objectives and expected impact • Physical versus virtual exchanges
15:15 – 15:25	**Lessons learnt and best practices about CXC**
15:25 – 16:10	**Testimonials from CXC participants and Partnerships** • Success stories from a virtual exchange: *SMART4NZEB* • Success stories from a physical exchange: *EXTRATEX*
16:10 – 16:15	**Next phase: post-pilot phase of CXC**
16:15 – 16:25	**Q&A**
16:25 – 16:30	**Feedback survey and wrap-up**

Housekeeping rules

- Your **microphone will be turned off during the presentation** and you will be given the option to unmute when the floor is opened in the Q&A session.

- We encourage **oral participation** instead of using the Q&A option. **Please raise your hand before speaking.**

- This event is **recorded**. If you do not wish to appear on the recording, please do not raise any questions orally. You can use the **anonymous setting** to pose questions.

- If you have any comments or remarks for the SO, please **contact us by email** so we can answer your query / set up a meeting.

- This presentation by the SO will be made available to all the participants after the webinar.

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Key opening notes

Benoit Esmanne, DG GROW

A brief update on ClusterXchange

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ClusterXchange in brief

- Pilot phase to run from 2019 to 2021 through the support of 13 European Cluster Partnerships | Excellence

- Due to COVID-19 outbreak, only virtual exchanges were implemented until August 2021. If a participant takes part in a virtual exchange, he/she can still take part in a physical exchange and receive financial assistance for the physical exchange

- Thus far, 228 exchanges have been confirmed

- Exchanges to continue until the KPIs for each Partnership have been met

ClusterXchange in brief (cont.)

- CXC Support Office (SO) has been functional since February 2020

- CXC SO has been mostly accessible through email. Support Office can now be reached by phone as well.

- The SO is responsible for running the CXC Help Desk, management of the IT Tool, support the implementation of exchanges, development and dissemination of communication materials, promotion of the scheme and conducting capacity-building activities

- SO keeps track of exchanges conducted by all Partnership and thus, it is essential to maintain constant communication with the SO

Virtual exchanges

- Virtual exchanges period ended on 31 August 2021

- No financial support was provided to VOs

- There have been 169 reported virtual exchanges

- Majority of the exchanges are on the IT Tool (only up to the matching phase) but some are yet to be created.

  - *Partnerships that have completed virtual exchanges should send all related necessary documents such as CTQs and Final Activity Reports to the SO*

  - *Partnerships and participants are required to create the matches on the IT Tool*

- Materials developed for virtual exchanges should not be used anymore, e.g., templates for Commitment to Quality and Final Activity Reports

Virtual exchanges

Performed exchanges

Exchanges	Figures/Info
Type of exchanges	Networking; Group event; Pitch training; Exploring new markets
Duration	165 3-day exchanges; 4 4-day exchanges
Partnerships	All 13 Partnerships
Exchanges	17 grouped; 2 single

Figures last retrieved: 08/11/2021

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Strengthening the European economy through collaboration

11

Physical exchanges

- 59 confirmed exchanges

- Participants who have done virtual exchanges can do physical exchanges

- The Final Activity Reports should be completed and submitted within 7 days after completion of the exchange and the eligible VOs should receive the reimbursement within 10 working days after the closure of the Final Activity Reports

- All the templates for physical exchanges are on the IT Tool

- Good examples of CTQ (action plan and agenda) from past exchanges were presented in the fourth network webinar(available in the repository)

Physical exchanges
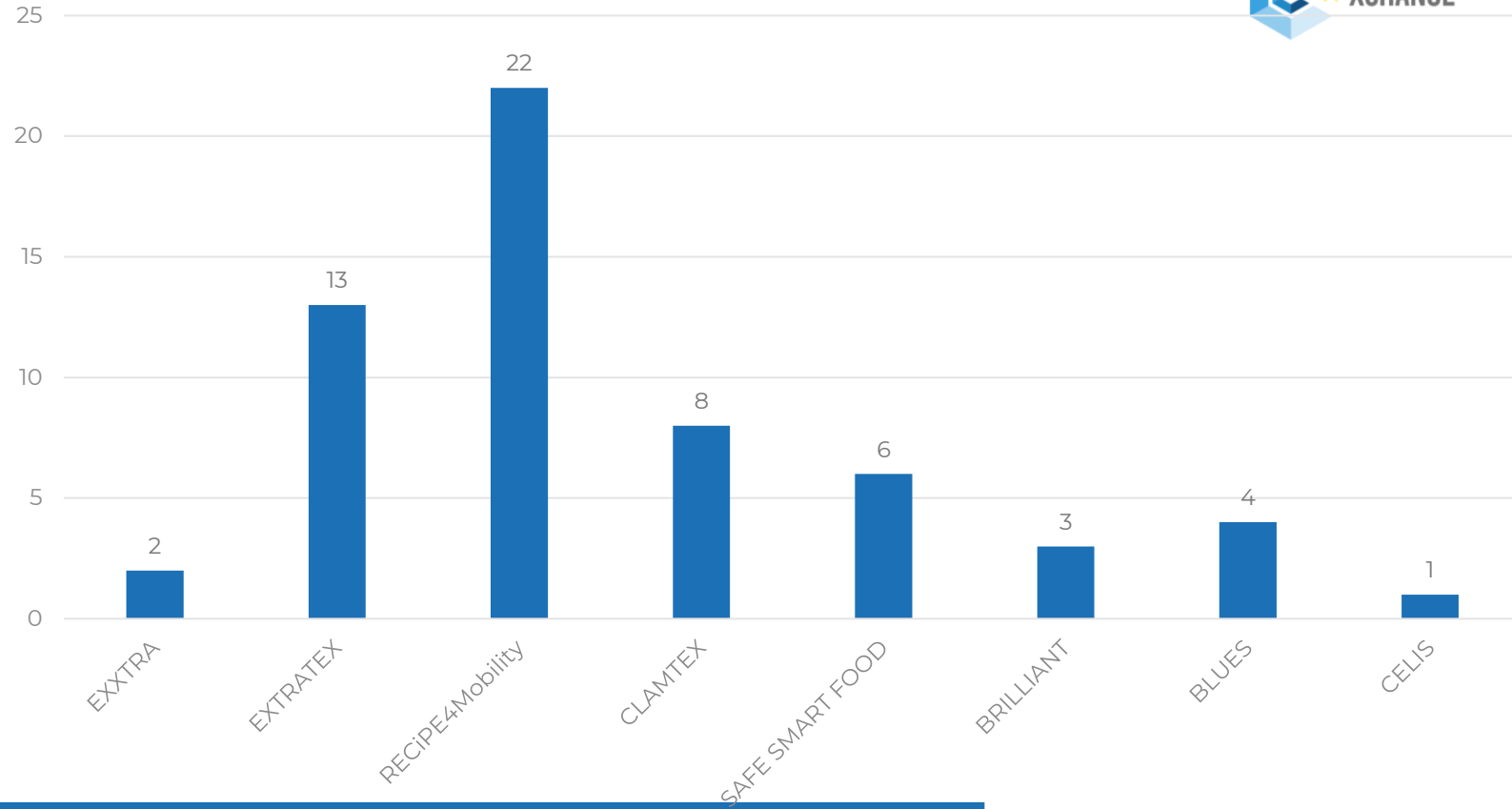
XCHANGE

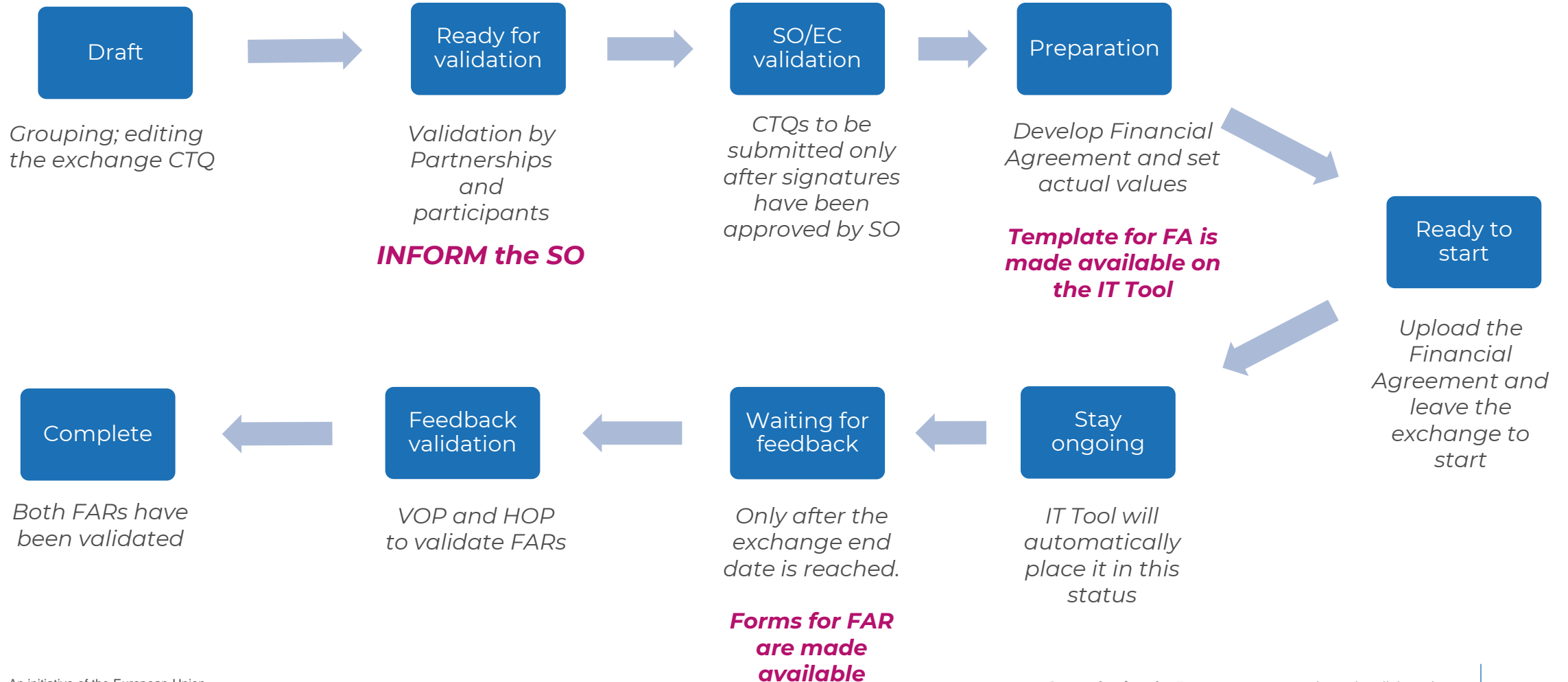| Exchanges	Figures/Info
Type of exchanges	Networking and events; Group event; Research, development and innovation; Exploring new markets
Duration	52 3-day exchanges; 7 5-day exchanges
Partnerships	8 Partnerships
Exchanges	7 grouped; 5 single

Figures last retrieved: 08/11/2021

Physical exchanges on the IT Tool

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Status on the IT Tool

```
Draft  →  Ready for validation  →  SO/EC validation  →  Preparation
```

Draft
Grouping; editing the exchange CTQ

Ready for validation
Validation by Partnerships and participants

INFORM the SO

SO/EC validation
CTQs to be submitted only after signatures have been approved by SO

Preparation
Develop Financial Agreement and set actual values

Template for FA is made available on the IT Tool

Ready to start
Upload the Financial Agreement and leave the exchange to start

Complete
Both FARs have been validated

Feedback validation
VOP and HOP to validate FARs

Waiting for feedback
Only after the exchange end date is reached.

Forms for FAR are made available

Stay ongoing
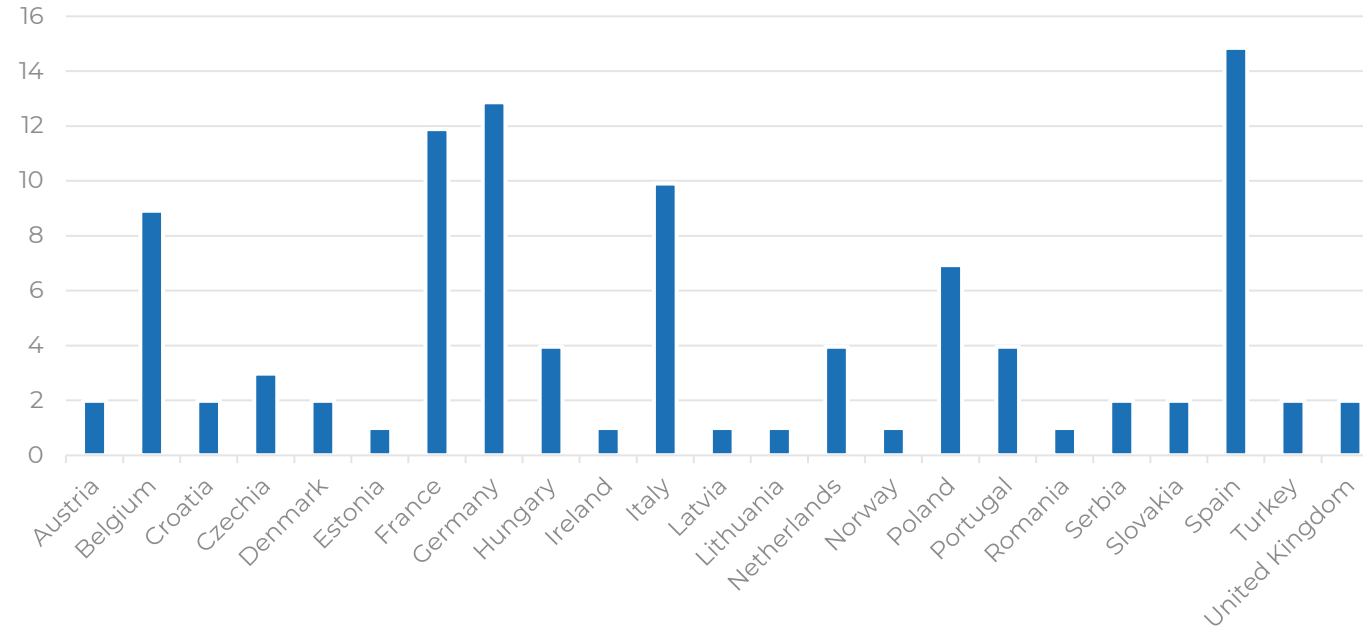*IT Tool will automatically place it in this status*

Physical exchanges on the IT Tool (cont.)

- Take note:
  - The CTQ and Final Activity Reports are generated in a form on the IT Tool
  - The Financial Agreement is downloaded from the IT Tool when an exchange is in 'Preparation' phase
  - The sector of exchange and actual figures (start/end date, duration and lump sum) should be indicated before the exchange is set as 'Ready to start'
  - SO is checking all CTQs beforehand, however, to save time, send the CTQ to the SO by email (word format) or create the CTQ on the IT Tool and set it as 'Ready for validation' and inform the SO by email
  - Send CTQs to the SO at least 2 weeks before the exchange begins

CXC statistics

% HO published profiles per country

% of matches initiated by different parties

- VOs 29.9%
- HOs 5.4%
- SO 4.8%
- Partnerships 59.9%
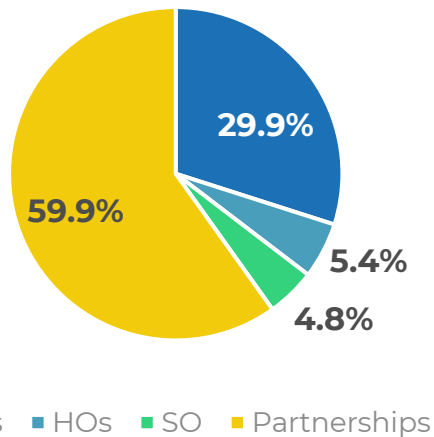
Host countries - physical exchanges

- Cz 13
- DE 13
- DK 1
- ES 4
- FR 10
- IT 2
- LV 5
- NL 3
- PL 1
- PT 6
- TR 1
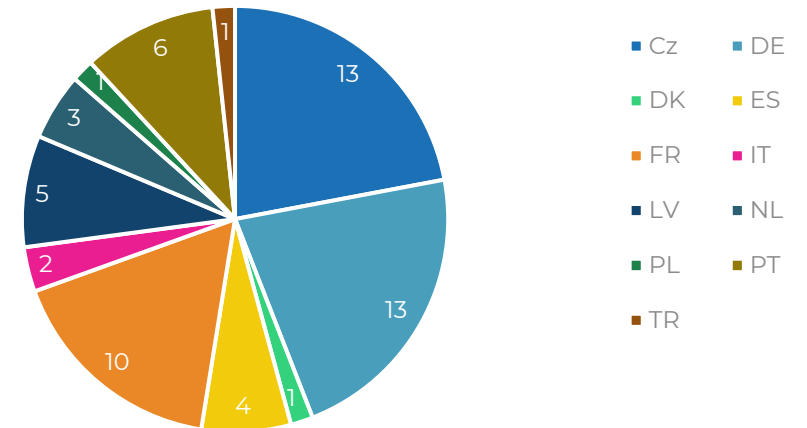
CXC IT Tool

- CXC IT Tool has been updated and will be continuously monitored, tested and improved

- **All physical exchanges** should be performed on the IT Tool

- New functionalities have been added to the IT Tool: for the Partnerships
  - Ability to send published profiles back to draft
  - New repository for admin personnel on the IT Tool
  - Insert the actual figures for an exchange (start/end date, duration and lump sum)
  - Insert sector of the exchange

CXC IT Tool (cont.)

- Take note:

  - All CTQs and FAs should be completed, validated by the SO, signed and uploaded on the IT Tool before the exchange starts

  - The exchanges that are ready to start should be put on 'Ready to start status'

  - The IT Tool automatically start exchanges that are on 'Ready to start' status once the 'start date' is reached

  - If the start date of an exchange passes, the actual figures for the exchange will need to be inserted by the SO

  - All IT Tool Manuals are currently being updated

  - Stagnant draft profiles on the IT Tool are regularly eliminated by the SO (profile holders are notified accordingly)

CXC IT Tool (cont.)

New features

Type: Exploring new markets

Planned dates: August 10th, 2021 to August 20th, 2021

Planned stay duration: 3 working days

Max Lump Sum: 830 €

Host country: Belgium

Actual Lump Sum Paid: Not set

Set actual dates

Sector of the exchange ⓘ

Crop and animal production, hunting and relat...

Set Actual Dates ✕

Actual start

10/08/2021

Please provide the date of the first day of the exchange

Actual end

20/08/2021

Please provide the date of the last day of the exchange

Actual Duration

3 working days

Please indicate the number of actual working days the exchange will have.

Actual Lump Sum Paid

0 €

Cancel   Save

XCHANGE   My Profiles   My Matches   My Exchanges   ECCP   Partnerships   Admin   Logout

Visiting Organisation SO Test 2

Unpublish   Go Back

Partnership

Boosting excellence in the European lighting value chain   Profile

✓ Is Partner

Organisation

Business Network

SO Test 2
📍 Rome - Italy
http://www.bing.com/
Sector   Crop and animal production, hunting and related service activities

Member of: Technology Enabled Construction Cluster - TEC

Description / Mission

Profile

XCHANGE   My Profiles   My Matches   My Exchanges   ECCP   Partnerships   Admin   Logout

Profiles   Matches   Exchanges   Statistics   **Repository**

CXC communication and capacity building

- Communication tools for Partnerships to use and promote CXC

  - CXC and Excellence Partnerships branding (logos)

  - Communication guidelines

  - Templates – Press and presentation

  - Excellence Partnership leaflet

  - Excellence Partnership Quality Manual

  - CXC Certificates for participants

  - 4 Network webinars and 4 Satisfaction surveys

- Informative materials have been developed for Partnerships and participants

  - CXC brochure for hosts and visitors

  - CXC IT Tool Manuals

  - CXC portal and Frequently Asked Questions

  - CXC webinars for participants

CXC communication and capacity building

- The SO is currently developing:

  - IT Tool tutorial multimedia materials to show how to use the IT Tool

  - Success stories to be published on the ECCP

  - CXC introduction video with testimonials and success stories video

  - Best practices guidelines

  - Updated IT Tool Manuals and FAQs

Lessons learnt and best practices about CXC

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Lessons learnt and best practices

Eligibility and background check:

- All participants should carefully check their eligibility on the CXC portal, CXC brochure and IT Tool Manuals or contact the representative of their organization

- Briefly go through the IT Tool Manuals and <u>IT Tool tutorial videos</u> (will be made available soon) before creating a profile/matches/exchange on the IT Tool

- The Partnership that is assigned should take the lead in contacting the profile holders and directly communicating about the eligibility of their profiles outside the IT Tool

Lessons learnt and best practices (cont.)

Communication with the SO:

- Direct interaction with the SO is highly recommended. If you have a handful queries (3+), please collect the queries, send to the SO at once, and request for a guidance call. The SO will organise a bilateral call with you (individually or in a group) to address queries

- For simple queries, contacting the SO by phone is recommended

Promotion of CXC:

- Partnerships should use the Communication Guidelines and promote CXC through their own channels and networks of CXC participants

- Partnerships should use the most recent CXC and Excellence visual identity

Lessons learnt and best practices (cont.)

Before the exchange:

- *General:* Partnerships should check in advance the signatories that are authorized to sign on behalf of the Partnership (Grant Agreement for the Excellence Partnership)

- *Registration:* The tool will automatically save your profile when you create one on the tool, thus, in case of interruption, avoid creating new profiles. Instead log in to the **IT Tool > IT Tool Dashboard > Click on 'Edit' for a profile**

- *Registration:* If you encounter problems on the IT Tool, contact the SO and send a screenshot(s) of the error or problem in order to facilitate the communication

- *Matching:* Recreating a cancelled/rejected match with the same counterparts needs the SO's intervention – please carefully check before you cancel or reject a match

Lessons learnt and best practices (cont.)

Before the exchange (cont.):

- *Exchange building:* double check all is in order before creating an exchange – when an exchange is created and has to be deleted, the respective VO's profile is removed from the database and will need to be recovered by the IT Team to match again (this would require time and cause delays).

- *Exchange building:* Partnerships should lead the CTQ development process and use the good examples from the 4th Network webinar

- *Exchange building:* Partnerships should take the lead to ensure the participants sign the CTQs and FAs following the signature guidelines in the FAQs (this will be made available for participants)

ClusterXchange – Network webinar IV

29/09/2021

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Lessons learnt and best practices (cont.)

During the exchange:

- *Exchange execution:* Partnerships should remind the participants to gather evidence of the exchange (hotel invoice, rent contract, boarding passes, letter from the HO)

After the exchange:

- *Exchange finalisation and closure:* Partnerships are responsible to ensure the personal/other details on the FA are accurate and the SO only checks the lump sum is correct

- *Exchange finalisation and closure:* if an organisation other than the VO pays for the exchange (to be reimbursed), the VOP and VO should internally check how to approach the reimbursement process. However, what is stipulated in the Quality Manual, FA and CTQ should precede.

- *Follow-ups:* Following up with past participants (after 2-12 months) is recommended. It is ideal for the "Expected outcomes" of the CTQ to detail follow-up plans as well.

Lessons learnt and best practices (cont.)

Other observations from past exchanges

- Planning of the exchange programme in advance is critical

- Each Partnership should plan a communication campaign in order to attract participants and disseminate the invite beyond the close circles of the Partnerships and their members - use any opportunity to inform (fairs, webinars, seminars, group and B2B meetings)

- Organise an introductory session with all the VOs (for grouped exchanges) to explain the technicalities of the exchange (focus on aim, eligibility, added-value, financial sustainability)

- Partnerships need to anticipate and dedicate time to developing CTQs and helping the participants in each step of the process

Lessons learnt and best practices (cont.)

Other observations from past exchanges (cont.)

- Exchange feedback time should always be planned after each visit to give opportunity to the participants to reflect and discuss jointly

- Promote in advance the exchange among other SMEs to attract more participants (VOs) and use action plans from successful past exchanges as basis/examples for new exchanges

- Ensure the agenda of the exchange fosters mutual learning from the HO and VO (not unilateral) and if the exchange is grouped, the action plan should have strategy to encourage/allow inter-VO learning/transfer/interactions

- Integrating an external event e.g., fair, conference, workshops, can provide the participants a wider range of stakeholders to interact with and provide the VOs higher chances of having B2B interactions

Testimonials from CXC participants and Partnerships

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Success stories from virtual exchanges

o *Excellence Partnership:* **Andrei Laurentiu Popescu**, *Coordinator of Strengthening clusters Management Activities and Running Trans-national for implementation of nearly Zero Energy Buildings (SMART4NZEB)*

o *CXC participant – Host Organisation:* **Katarzyna Korczak**, *Project manager at RIC Pro-Akademia*

o *CXC participant –Visiting Organisation:* **Primož Zorec,** *CEO of CoGreen d.o.o.*

Success stories from physical exchanges

o Excellence Partnership: **Enrico Venturini**, Coordinator of European TEXtile-
TRAnsport-Sustainability paradigm for industrial clusters EXcellence in cross-
sector innovation (EXTRATEX)

o CXC participant – Host Organisation: **Petra Dufkova**, Project manager at
CLUTEX - klastr technicke textilie, z.s.

o CXC participant – Visiting Organisation: **Gilberto Biliotti**, General Manager at
BIPIER SRL

Next phase: post-pilot phase of CXC

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Next phase of CXC – next generation

- The next generation of the CXC will be implemented by Excellence Partnerships selected under the European Cluster Excellence Programme 2020 (COS-CLUSTER-2020-3-03) call for proposals.

- Some of the current Excellence Partnerships will extend their project duration and continue to implement exchanges

- Physical exchanges will continue to be implemented in December 2021

- A dedicated Support Office will support the implementation of the next phase of CXC

Next phase of CXC – CXC rules

Current eligibility criteria states:

- *cluster organisations profiled on ECCP or similar business network organisations*

- *scaling-up support organisations (technology centre, research institute, fab-lab, resource-efficiency service provider, [digital] innovation hub, creative hub, incubator or accelerator) that are members of cluster organisations profiled on the European Cluster Collaboration Platform (ECCP); or*

- *small and medium-sized enterprises (SMEs) that are members of cluster organisations profiled on ECCP*

Next phase of CXC – CXC rules

Updates:

- The eligibility criteria for host organisations is expanded (e.g. large companies will be able to act as hosts)

- Those visiting organisations (e.g. an SME) that participated in a physical exchange under this generation/pilot phase, can again participate in the second generation of CXC implemented by the ESCP-4x 2020 projects

Next phase of CXC – current status and reminders

- The last CXC Satisfaction Survey will be launched from 10 to 24 November 2021.

- Registration for Partnering side-event on 23 November 2021 is still open. Two representatives from the Partnerships should be present in the event. The format of the event is hybrid.

- The documentations for virtual exchanges and matches on IT Tool should be finalized.

- The SO will clean draft profiles on the IT Tool at the beginning of December 2021.

- CXC SO is still collecting success stories – please share your stories with us!

Q&A

Feedback Survey & Wrap-up

- You will receive the event <u>presentation</u> in a follow-up email sent by the SO.

- We have 5 min to fill-in the **Feedback Survey** – you can click on the link or scan the QR code.

- The aim of the survey is to collect your overall evaluation regarding the event. **Please do fill in the survey**, your feedback is important to improve the organisation of upcoming events.

- The link to the Feedback Survey will also be sent to you via email after the event.

- Thank you!

Get in contact with the CXC SO

- Phone queries: +351 22 607 64 07
- Written queries (in English): clusterxchange@clustercollaboration.eu

Open 10:00-14:00 (CET) Monday to Friday on working days

More information

Contact the ClusterXchange Support Office
for queries and guidance at
ClusterXchange@clustercollaboration.eu

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Thank you for your attention!