

# ClusterXchange IT Tool user manual

## 30 September 2020

[www.clustercollaboration.eu](http://www.clustercollaboration.eu)

## Table of Contents

1. Introduction.....	7
1.1. Purpose of the Document .....	7
1.2. Structure and Methodology .....	7
2. General Information .....	9
2.1. ClusterXchange in brief .....	9
2.2. IT Tool .....	10
2.3. Support Office (SO).....	14
3. Registration guide for Host Organisations (HO).....	16
3.1. STEP 1 – Eligibility check.....	16
3.2. STEP 2 – My profile.....	20
3.3. STEP 3 – Submission and Validation.....	26
4. Registration guide for Visiting Organisations (VO).....	28
4.1. STEP 1 – Eligibility check.....	28
4.2. STEP 2 – My profile.....	33
4.3. STEP 3 – Submission and Validation.....	39
5. Participation .....	41
5.1. Matching.....	41
STEP 1 – View the matches.....	43
STEP 2 – Search for matches .....	43
STEP 3 - Perform and conclude matches.....	44
5.2. Exchange Building.....	48
STEP 1 – View the exchange .....	49
STEP 2 – Edit the exchange (Draft status) .....	50
STEP 3 – Approve the exchange by the VO/HO (Ready for Approval status).....	51
STEP 4 – Approve the exchange by the Partnership(s) (Partnership approval status) .....	53
STEP 5 – Approve the exchange by the EC (EC approval status).....	53
STEP 6 – Prepare the exchange (Preparation status).....	54
STEP 7 – Start the exchange (Ready to start status) .....	54
5.3. Exchange Execution.....	54
STEP 1 – Perform the exchange (Stay ongoing status).....	55
STEP 2 – Report on the exchange (Waiting for feedback status).....	56

STEP 3 – Complete the exchange (Feedback Validation status) .....	57
6. Annexes .....	58
Annex 1 – Lump sums paid to the VOs.....	58
Annex 2 – List of COSME countries .....	60
Annex 3 – Matching Score Formula .....	61
Annex 4 – Template of the Commitment to Quality.....	63
Annex 5 – Template of the Financial Agreement.....	67

## Table of Figures

Figure 1: CXC portal login .....	10
Figure 2: IT Tool dashboard - example .....	11
Figure 3: My Profiles menu .....	12
Figure 4: My Matches menu .....	12
Figure 5: My Exchanges menu .....	13
Figure 6: Footer of the CXC IT Tool .....	13
Figure 7: SO's services for CXC participants .....	15
Figure 8: European Union's definition of an SME .....	17
Figure 9: Overview of the processes involved (HO) .....	19
Figure 10: Choose a profile type (HO) .....	20
Figure 11: My Profile - personal Information (HO) .....	21
Figure 12: My Profile - organisational information (1) .....	22
Figure 13: My Profile - organisational information (2) .....	23
Figure 14: My Profile - HO motivation .....	24
Figure 15: My Profile - HO preferences .....	25
Figure 16: My Profile - Partnership in charge of the HO (HOP) .....	26
Figure 17: HO organisation profile overview .....	27
Figure 18: Final confirmation – profile submission for validation .....	27
Figure 19: European Union's definition of an SME .....	29
Figure 20: Overview of the processes involved (VO) .....	32
Figure 21: Choose a profile type (VO) .....	33
Figure 22: My Profile - personal Information (VO) .....	34
Figure 23: My Profile - organisational information (VO) (1) .....	35
Figure 24: My Profile - organisational information (VO) (2) .....	36
Figure 25: My Profile - VO motivation .....	37
Figure 26: My Profile - VO preferences .....	38
Figure 27: My Profile - Partnership in charge of the VO (VOP) .....	39
Figure 28: VO organisation profile overview .....	40
Figure 29: Final confirmation – profile submission for validation .....	40
Figure 30: Matching and Exchange building and execution steps in the IT Tool .....	41
Figure 31: Matching process diagram .....	42
Figure 32: Pending matches for the HO .....	43
Figure 33: Types of filters provided for matching .....	43
Figure 34: List of available organisations .....	44
Figure 35: VO initiating a match with an HO .....	45
Figure 36: Initial validation by the VO .....	46
Figure 37: Chat facility enabled by the IT Tool .....	46
Figure 38: Exchange Building process .....	48
Figure 39: Overview of the exchange .....	49
Figure 40: Creating an Exchange Group .....	51
Figure 41: Sending the exchange back to draft .....	53
Figure 42. Exchange execution process .....	55

Figure 43: Reporting after the exchange..... 56  
Figure 44: HO feedback reporting ..... 57

## Abbreviations

CXC	ClusterXchange
EASME	Executive Agency for Small and Medium-sized Enterprises
EC	European Commission
ECCP	European Cluster Collaboration Platform
HO	Host Organisation
HOP	Partnership in charge of the HO
Partnership	ESCP-4x: European Strategic Cluster Partnerships for Excellence
Partnership EM	Partnership Exchange Manager
SO	ClusterXchange Support Office
VO	Visiting Organisation
VOP	Partnership in charge of the VO

# 1. Introduction

Launched in 2020, ClusterXchange pilot scheme (CXC) aims to support short-term exchanges to better connect Europe's industrial ecosystems. It aims to facilitate transnational cooperation, peer learning, networking and innovation uptake between actors of different industrial clusters. It is implemented with support from cluster organisations that have teamed up in European Strategic Cluster Partnerships for Excellence (ESCP-4x) (referred as Partnerships). The Partnerships are supported by funding from the COSME programme of the European Union (EU).

CXC is implemented by 13 Partnership(s), with the support of the European Cluster Collaboration Platform (ECCP). These partnerships gather 69 cluster organisations from 21 different European countries and they focus on different sectors such as Water, Eco-industries, Smart building, Smart Lighting, Health, Emerging technologies, Advanced manufacturing, Textile, Plastic, Automotive, Railway, Multimodality, Urban Mobility, Packaging, Agro-food services, nearly Zero Energy Buildings, Smart City, Energy, ICT and Sport. The Partnerships accompany the exchange participants all along the processes and serve as contact points for the registration, matching and participation in CXC.

The overall action shall foster SME competitiveness and assist companies to successfully access global markets. The CXC supports European clusters - and more particularly SMEs and scaling-up support organisations that are members of a cluster - to strengthen their strategic cross-regional collaboration activities by spending periods of time in a partner cluster (or SME/scaling-up support organisation member of a cluster) in another country (exchange). The nature of each exchange may follow different specific objectives within a broader approach aiming at the consolidation and/or the creation of new value chains across Europe.

## 1.1. Purpose of the Document

The purpose of the CXC IT Tool user manual is to provide CXC participants (Host Organisations (HOs), Visiting Organisations (VOs)) and other parties interested in the initiative, the necessary information on the IT Tool, in order to ease and facilitate the process of registration (profile creation), matching, and participation (exchange building and execution). The guidelines and instructions provided in this manual are meant to develop a clearer perspective in regards to the IT Tool and other technical specificities of the involved processes in general.

## 1.2. Structure and Methodology

The document has been structured into the following chapters:

- Chapter 1 - Introduction
- Chapter 2 – General information
- Chapter 3 - Registration – guide for Host Organisations (HO)
- Chapter 4 - Registration – guide for Visiting Organisations (VO)
- Chapter 5 - Participation

After an introduction in Chapter 1, Chapter 2 explains about the CXC, the CXC IT Tool and the CXC Support Office in general. The following chapters – 3 and 4 – discuss the registration related specifications for the HO and the VO separately. It is relevant to note that these two chapters have

necessary overlaps of information in order to enhance the ease of readability and comprehension. Both for the HO and the VO, the process of registration follows a three-step protocol. The registered profiles are stored in an online database, accessible to other participants for matching and exchanges.

Chapter 5 is relevant for both HOs and VOs and discusses the matching process and exchange building and execution in detail. The text provided in this document is supported by preview screenshots extracted from the IT Tool itself and additional flowcharts and diagrams to enhance the familiarity with the steps involved – registration (profile creation), matching, exchange building and execution.

The HO and VO profiles created in the IT Tool for the purpose of the screenshots in Chapters 3 and 4 have been carried forward in Chapter 5 so as to build a link and ensure consistent flow of information.



## 2. General Information

### 2.1. ClusterXchange in brief

CXC supports the implementation of transnational short-term exchanges between actors of different industrial clusters. An exchange CXC constitutes a stay abroad by a VO at a HO to explore collaboration and growth opportunities. Partnership(s) financially contribute to exchanges by providing a lump sum to VOs to partly cover their travel and accommodation expenses for the stay. Maximum lump sum amounts are predefined per country of destination and are included in Annex 1.

An exchange can be minimum three working days and maximum one month, excluding travel time.

The pre-defined lump sum is paid in full for each exchange except in the following non-cumulative cases:

- The duration of the stay is shorter than five working days (excluding travel time);
- The distance between the two involved organisations is shorter than 200 kilometres.

In these cases, the lump sum is reduced by half. The lump sum is paid to the VO after the exchange takes place successfully. Each eligible organisation may benefit from the pilot scheme only **once as a VO per cycle (i.e. once under each call for proposals of the European Cluster Excellence Programme)**. However, an organisation can host an exchange multiple times and simultaneously (group of exchanges).

Eligible organisation types include:

- Cluster organisations and business network organisations<sup>1</sup>;
- Scaling-up support organisations (technology centre, research institute, fab-lab, resource-efficiency service provider, [digital] innovation hub, creative hub, incubator and accelerator) that are cluster members;
- Small and medium-sized enterprises (SMEs) that are cluster members.

Eligible participants must have their permanent residence (i.e. the place where the organisation is registered) in a country participating in the [COSME programme](#)<sup>2</sup> of the EU. More details on eligibility are in Chapter 3 and 4.

The activities to be implemented during the exchange may include:

- Individual or grouped capacity building;

---

<sup>1</sup> Eligible applicants are **cluster organisations and business network organisations** that are involved in supporting the enhancement of collaboration, networking and learning in innovation clusters to **stimulate innovative activity** by promoting or channelling specialised and customised business support services especially to SMEs and/or promoting the sharing of facilities and exchange of knowledge and expertise, in compliance with the coverage of 'innovation clusters' as described in the sections 1.2 and 1.3 and Annex I of the "[EU Framework for State Aid for Research and Development and Innovation](#)".

<sup>2</sup> COSME is the EU programme for the Competitiveness of Enterprises and Small and Medium-sized Enterprises running from 2014 - 2020 to promote entrepreneurship and improve the business environment for SMEs to allow them to realise their full potential in today's global economy.

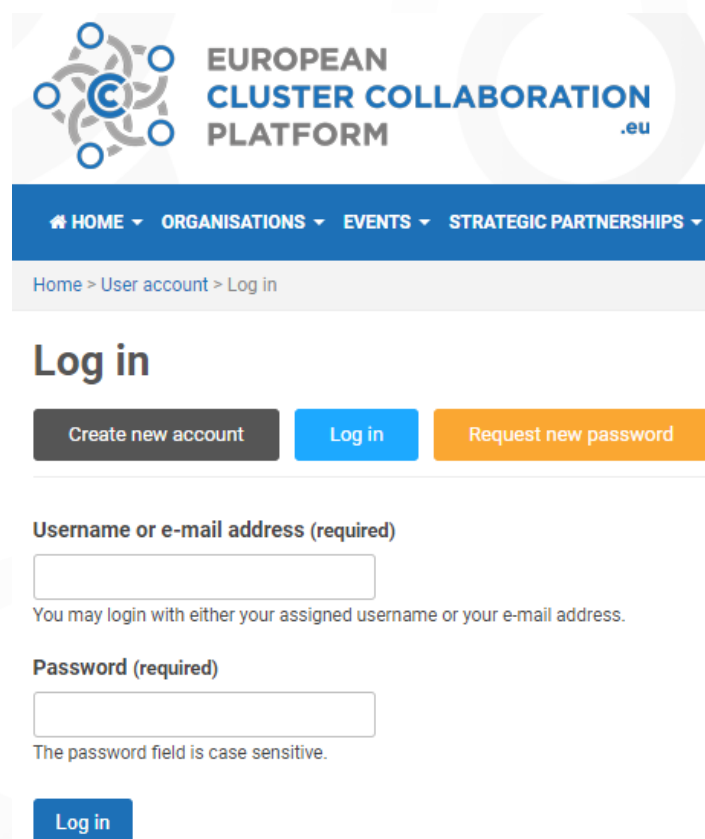
- Sharing of knowledge, experience and information in specific areas;
- Project development, innovation and research and development;
- Market research;
- Networking, identification of new partners and creation of business opportunities.

Registration and participation (matching, exchange building, and exchange execution) are regarded as the two main phases of taking part in CXC and are administered via a dedicated CXC IT Tool.

## 2.2. IT Tool

The CXC IT Tool (also referred as IT Tool) aims to facilitate the exchanges from an administrative perspective. The IT Tool is part of the [CXC portal](#) on the ECCP website. The structure of the IT Tool is in line with the structure of this manual and includes features for registration, matching, exchange building and execution.

To enter the IT Tool, it is necessary to have a user account on the ECCP website (<https://www.clustercollaboration.eu/>). This can be created by clicking on the 'Login' button and then on 'Create a new account'. The same login details can then be used to access the IT Tool. Preview of the login page of the CXC portal is provided in Figure 1.



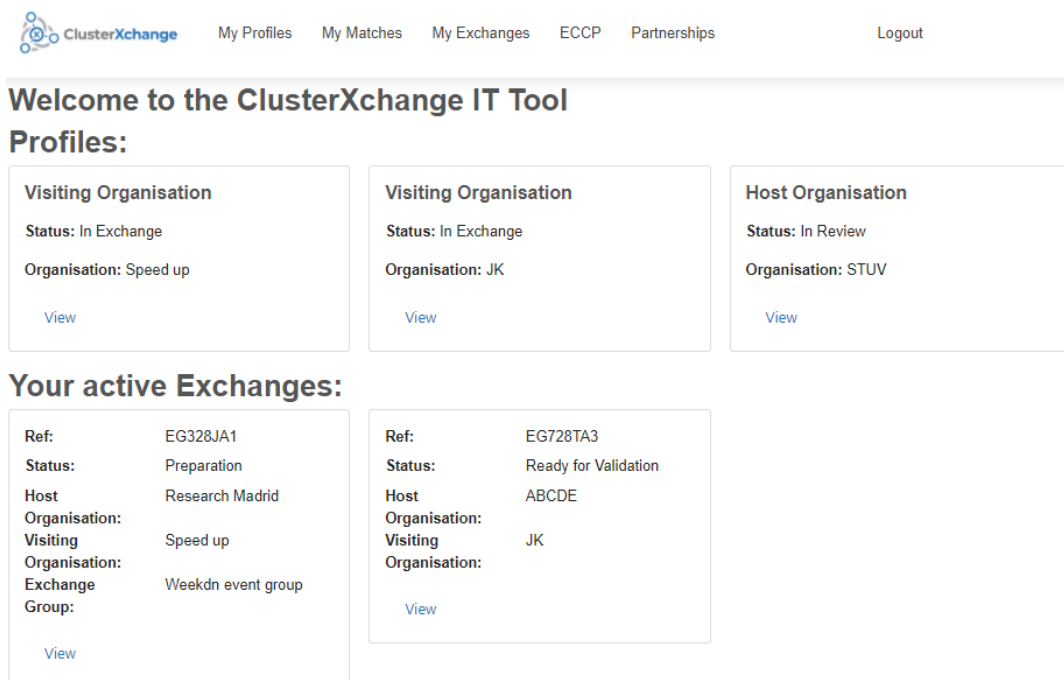
The screenshot shows the login page of the European Cluster Collaboration Platform. At the top left is the ECCP logo. To its right is the text 'EUROPEAN CLUSTER COLLABORATION PLATFORM .eu'. Below this is a blue navigation bar with links: 'HOME', 'ORGANISATIONS', 'EVENTS', and 'STRATEGIC PARTNERSHIPS'. Underneath the navigation bar is a breadcrumb trail: 'Home > User account > Log in'. The main heading is 'Log in'. Below the heading are three buttons: 'Create new account' (dark grey), 'Log in' (blue), and 'Request new password' (orange). There are two input fields: 'Username or e-mail address (required)' and 'Password (required)'. Below the first field is a note: 'You may login with either your assigned username or your e-mail address.' Below the second field is a note: 'The password field is case sensitive.' At the bottom left of the form is a blue 'Log in' button.

Figure 1: CXC portal login

[www.clustercollaboration.eu](http://www.clustercollaboration.eu)

## Dashboard

After logging in, the user is directed to the home page/dashboard of the IT Tool. This provides an overview of the features of the IT Tool and displays all HO and VO profiles created by the user, as shown in the example preview (Figure 2). The user can create two types of profiles – HO and VO (more information on profile creation is included in Chapter 3 and 4). The user can create only one HO and a VO profile for an organisation. HO and VO profiles on the dashboard can be easily distinguished (Figure 2).



**Welcome to the ClusterXchange IT Tool**

**Profiles:**

<p><b>Visiting Organisation</b></p> <p>Status: In Exchange</p> <p>Organisation: Speed up</p> <p><a href="#">View</a></p>	<p><b>Visiting Organisation</b></p> <p>Status: In Exchange</p> <p>Organisation: JK</p> <p><a href="#">View</a></p>	<p><b>Host Organisation</b></p> <p>Status: In Review</p> <p>Organisation: STUV</p> <p><a href="#">View</a></p>
--	--	--

**Your active Exchanges:**

<p>Ref: EG328JA1</p> <p>Status: Preparation</p> <p>Host: Research Madrid</p> <p>Organisation: Speed up</p> <p>Visiting Organisation: Weekdn event group</p> <p>Exchange Group:</p> <p><a href="#">View</a></p>	<p>Ref: EG728TA3</p> <p>Status: Ready for Validation</p> <p>Host: ABCDE</p> <p>Organisation: JK</p> <p>Visiting Organisation:</p> <p><a href="#">View</a></p>
--	---

Figure 2: IT Tool dashboard - example

As far as the exchanges are concerned, the dashboard also lists all active exchanges of the user. In addition to the above, the following menus have been linked to the dashboard.

- **My Profiles:** The profiles created by the user are showcased in this section. Each profile can be viewed or edited by accessing this menu (Figure 3).

Create new profile

## Visiting Organisation Profiles

<p><b>Visiting Organisation</b></p> <p>Status: In Exchange</p> <p>Organisation: Speed up</p> <p><a href="#">View</a></p>	<p><b>Visiting Organisation</b></p> <p>Status: In Exchange</p> <p>Organisation: JK</p> <p><a href="#">View</a></p>
--	--

## Host Organisation Profiles

<p><b>Host Organisation</b></p> <p>Status: Published</p> <p>Organisation: STUV</p> <p><a href="#">View</a> <a href="#">Find Matches</a></p>
---

Figure 3: My Profiles menu

- My Matches: This menu enables the users to search for matches for the profiles that the user created. All existing matches the user have are also displayed here (Figure 4).

### Matches for VO Organisation: Speed up

The profile is involved in an exchange. [My exchanges](#)

### Matches for VO Organisation: JK

The profile is involved in an exchange. [My exchanges](#)

### Matches for Host Organisation: STUV

No matches at the moment. [Find Matches](#)

Figure 4: My Matches menu

- My Exchanges: This menu enables the users to view exchanges associated with the profiles that the user created. (Figure 5).

### Exchanges for Visiting Organisation Speed up

Ref: EG328JA1  
 Status: Preparation  
 Organisation: Research Madrid

[View](#)

### Exchanges for Visiting Organisation JK

Ref: EG728TA3  
 Status: Ready for Validation  
 Organisation: ABCDE

[View](#)

### Exchanges for Host Organisation STUV

No exchanges with this profile

Figure 5: My Exchanges menu

The footer (Figure 6) displays a library of resources relevant for the user. By clicking on the names, the user is redirected to the CXC IT Tool user manual, the CXC portal, and the SO.

The ClusterXchange IT tool is part of the European Cluster Collaboration Platform

**Resources:**

- [User guidelines documentation](#)
- [ClusterXchange Portal](#)
- [Support Office](#)

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Figure 6: Footer of the CXC IT Tool

### Communication in different phases

In the **registration phase**, if the user has queries or needs specific guidance, the SO should be contacted<sup>3</sup> as no Partnership contact point is yet assigned.

**In the participation phase** (matching, exchange building and execution) the assigned Partnership can be contacted through the contact details indicated through the IT Tool. The profile of the assigned Partnership is indicated in the user profile overview (see Figure 17). During matching (once the user profile is validated and published but is not yet in an exchange), the participants (HOs and VOs) can directly contact each other through the chat facility provided by the IT Tool. Each of these parties receive an email notification of the sent messages. The contact point should be contacted by email /phone.

In addition, and particularly to facilitate **exchange building and execution**, once an exchange is created, an Exchange Forum is made available for communication within each individual exchange web section. Participants and the Partnerships receive notifications for messages posted. This Forum is exclusively reserved to involved parties and can therefore be used for all communications on an exchange. Email/phone communication can still be used, if necessary.

## 2.3. Support Office (SO)

The ECCP assists in the execution of CXC by providing a dedicated Support Office (SO) for general information and guidance on the participation in CXC and by developing the CXC IT Tool to facilitate the execution of the scheme for all participants. Both these aspects are meant to support and facilitate the participation in CXC and are discussed in the following sections.

The SO provides general and specialised assistance to the Partnerships and to the participants. However, it is relevant to note that the first contact points for the participants about CXC are the Partnerships. The contact details of the Partnership contact point for each participant will be available in the IT Tool after the registration in the IT Tool is performed. The SO has various responsibilities within the framework of ECCP tailored to address the needs of the Partnerships and the participants. For the participants, there are five main types of activities of support conducted by the SO. These can be seen in Figure 7.

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<sup>3</sup> Phone queries: +351 22 607 64 07; Written queries (in English): [clusterxchange@clustercollaboration.eu](mailto:clusterxchange@clustercollaboration.eu); Open 10:00-14:00 (CET) Monday to Friday on working days

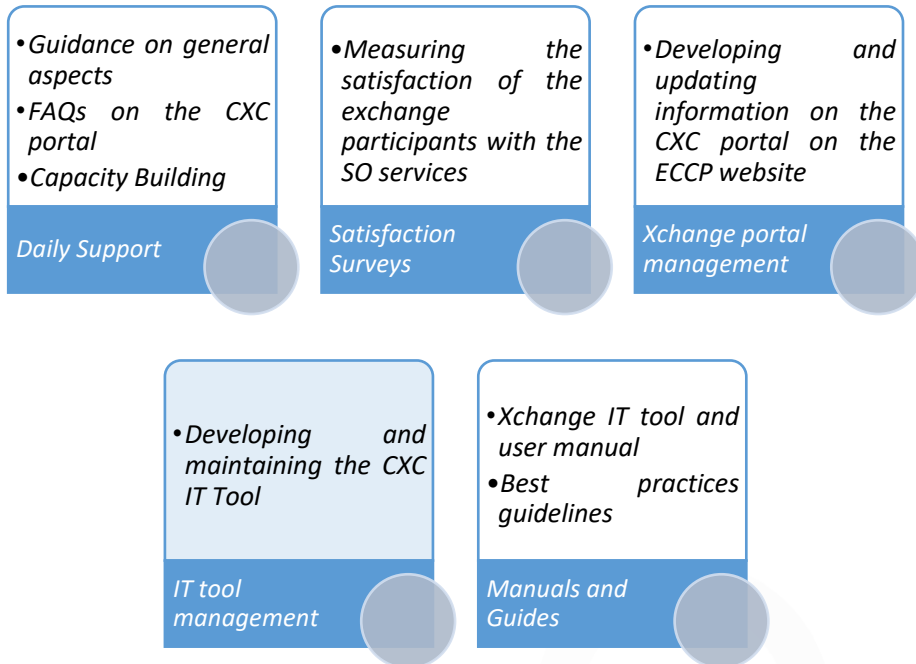


Figure 7: SO's services for CXC participants

### ClusterXchange Support Office contact

Phone queries: +351 22 607 64 07

Written queries (in English): [clusterxchange@clustercollaboration.eu](mailto:clusterxchange@clustercollaboration.eu)

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



## 3. Registration guide for Host Organisations (HO)

### 3.1. STEP 1 – Eligibility check

It is important to make sure that the user complies with the CXC eligibility criteria and meets the minimum quality standards set by the scheme. It is the responsibility of the user to submit, complete comprehensive and accurate data in the IT Tool, and to assess if his/her application(s) is in line with the eligibility criteria described in this chapter. In the event of doubt, additional information may be requested from the SO. However, it should be noted that the European Commission (EC) - DG GROW and the EASME reserve the right to exclude applicants that are ineligible as per the established criteria or are not in line with the objectives of CXC.

#### Eligibility criteria

The first step before registering in the IT Tool is to check your eligibility as a participant in CXC. The eligibility criteria have been categorised into three types: A. Legal; B. Age; and C. Geographical.

#### A. Legal Criteria - The types of eligible organisations are:

- All cluster organisations<sup>4</sup> and business network organisations<sup>5</sup> from COSME participating countries (full list of COSME participating countries in Annex 2)
- SMEs from a COSME participating country that are cluster members. SME definition as per the EU is explained below

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<sup>4</sup> 'Innovation clusters' are defined in the Framework for State aid for research and development and innovation (2014/C 198/01) as "structures or organised groups of independent parties (such as innovative start-ups, small, medium and large enterprises, as well as research and knowledge dissemination organisations, non-for-profit organisations and other related economic actors) designed to stimulate innovative activity by promoting sharing of facilities and exchange of knowledge and expertise and by contributing effectively to knowledge transfer, networking, information dissemination and collaboration among the undertakings and other organisations in the cluster".

<sup>5</sup> See footnote 1 on page 9



### The European Union's SME definition

The European Union defines an SMEs as enterprises which fulfil the below criteria:

- Enterprise category: Small and medium-sized
- Head count < 250
- Turnover ≤ € 50 million Or Balance sheet total ≤ € 43 million

Besides the staff headcount ceiling, an enterprise will also qualify as an SME if it meets either the turnover ceiling or the balance sheet ceiling, but not necessarily both. Specific rules are applicable when calculating ceilings for enterprises which are not autonomous (partner or linked enterprises) and for publicly owned enterprises, which do not qualify as SMEs.

Further information about the EU's SME definition at: [http://ec.europa.eu/growth/smes/business-friendly-environment/sme-definition\\_en](http://ec.europa.eu/growth/smes/business-friendly-environment/sme-definition_en)

The SME definition document includes a model declaration that can be requested for enterprises whose qualification as SME is not clear.

Figure 8: European Union's definition of an SME

- Scaling-up support organisations from COSME participating countries that are cluster members: These include scaling-up support organisations<sup>6</sup>, research institutes, fab labs, [digital] innovation hubs<sup>7</sup>, creative hubs, resource-efficiency service providers<sup>8</sup>, incubators and accelerators. They comprise any public or private organisation that is providing access to the testing and validation of technologies and concepts, market intelligence as well as business incubation and acceleration support services in relation to the uptake of advanced technology, digitalisation, new business models, low-carbon and resource-efficient solutions, creativity and design and skills upgrading.

**Note: To take part in the scheme, all participants have to be linked to a validated Cluster Organisation profile on the ECCP, with the exception of Business networks. Participants profiling as Cluster Organisations on the CXC IT Tool need to use an ECCP user account associated as an administrator with the organisation's ECCP profile. Participants profiling as organisations that are members of a Cluster Organisation need to indicate the name of such Cluster Organisation in the**

<sup>6</sup> Numerous terms are used for "technology centres", such as innovation centres, science parks, technology parks, fab labs, co-working centres and so on. See also European Commission (2014) Setting up, managing and evaluation EU Science and Technology Parks: An advice and guidance report on good practice, [https://ec.europa.eu/regional\\_policy/sources/docgener/studies/pdf/stp\\_report\\_en.pdf](https://ec.europa.eu/regional_policy/sources/docgener/studies/pdf/stp_report_en.pdf) The European Commission has defined and mapped technology centres that provide services to SMEs to innovate with Key Enabling Technologies (KETs) as any public or private organisation capable of delivering research and innovation close-to-market services to SMEs from Technological Readiness Level (TRL) 3 to 8, but with at least one TRL >5. See <https://ec.europa.eu/growth/tools-databases/kets-tools/kets-tc/map>. For an explanation of TRL, see [https://ec.europa.eu/research/participants/data/ref/h2020/wp/2014\\_2015/annexes/h2020-wp1415-annex-g-trl\\_en.pdf](https://ec.europa.eu/research/participants/data/ref/h2020/wp/2014_2015/annexes/h2020-wp1415-annex-g-trl_en.pdf)

<sup>7</sup> Digital Innovation Hubs act as one-stop-shops where companies –especially SMEs, startups and mid-caps– can get access to technology-testing, financing advice, market intelligence and networking opportunities in relation to digital transformation and uptake of digital technologies. See also <https://ec.europa.eu/digital-single-market/en/digital-innovation-hubs> and <http://s3platform.jrc.ec.europa.eu/digital-innovation-hubs-tool>

<sup>8</sup> <https://www.resourceefficient.eu/en/support-organisations>

***"Cluster Organisation I am a member of" field of the Organisational Information step of the registration process.***

### **B. Age Criteria**

The user that represents the HO must be minimum 18 years old in order to have the legal capacity to sign agreements and to participate.

### **C. Geographical Criteria**

HOs must have their **'permanent residence'** in an EU Member State or in any of the other COSME participating countries to participate in CXC.

'Permanent residence' is defined as:

- The place where the applicant organisation is registered;
- If an organisation has several registered establishments in different EU Member States or other participating countries, the user should choose the country where he/she is based as his/her permanent residence.

Participation in CXC is not based on nationality or legal residence, therefore holding a specific nationality or legal residence status does not grant or deny a user the right to participate in CXC.

#### Third country nationals

Users representing eligible organisations who are not nationals of an EU Member State or of any of the COSME participating countries can participate in CXC provided that they have spent 183 days in a participating country with a residence permit or equivalent document that allows them to reside in the country, and that they have the official capacity to represent an eligible organisation in the EU or any other participating country. If this condition is not fulfilled, they cannot participate in CXC.

Sections 3.2 and 3.3 discuss in detail the process of profile creation, submission, and validation. Figure 9 presents a scheme to simplify and graphically explain these processes.

Partnership validation / action needed is highlighted in orange

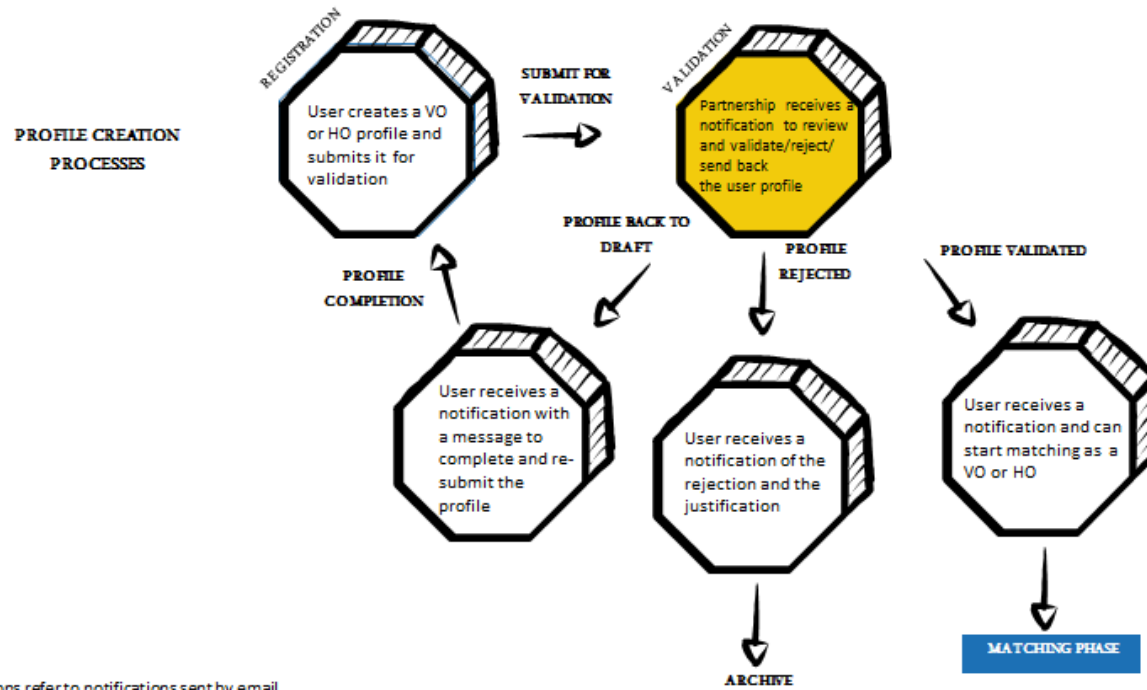
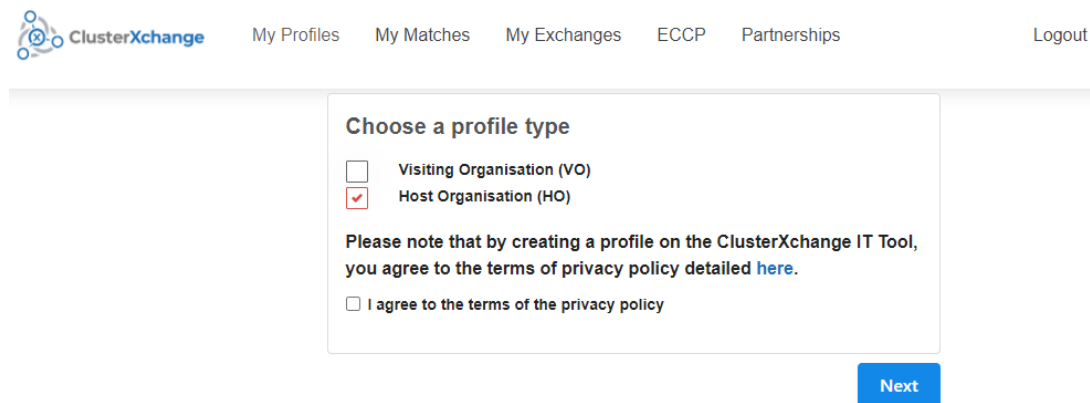


Figure 9: Overview of the processes involved (HO)

## 3.2. STEP 2 – My profile

Profile creation involves filling in a form that request information on aspects relevant for participation in CXC and for communication with the Partnership contact point (HOP/VOP) and the SO. These are presented further below in Figure 11. As a first step of profile creation, select the type of profile you wish to create on the IT Tool dashboard (Figure 10).



The screenshot shows the ClusterXchange IT Tool dashboard. The navigation menu includes: My Profiles, My Matches, My Exchanges, ECCP, Partnerships, and Logout. The main content area is titled 'Choose a profile type' and contains the following options:

- Visiting Organisation (VO)
- Host Organisation (HO)

Below the options, there is a note: 'Please note that by creating a profile on the ClusterXchange IT Tool, you agree to the terms of privacy policy detailed [here](#).' Below the note is a checkbox:  I agree to the terms of the privacy policy. A blue 'Next' button is located at the bottom right of the form.

Figure 10: Choose a profile type (HO)

### Personal Information

As can be seen in Figure 11, the fields on Page 1 of profile creation include biographical details, contact information, nationality, spoken language portfolio, and CV upload. The users are requested to upload their full personal CVs with a maximum admissible size up to 1MB. There is an option towards the end of the page to tick mark if the user has a disability with space for a short explanation. At the end of the form filling, the user must cross-check the information provided and complete the cells marked in Red.

## Edit profile

1

Personal Information

2

Organisational Information

3

HO Motivation

4

HO Preferences

5

Partnership

### Personal Information

Please fill in the personal details of the person that will represent the organisation and participate in the exchange.

First Name \*

John

Last Name \*

McCarthy

Email address \*

sbtest11@test.test

Phone \*

123456789

Spoken Languages \*

English x French x

Maximum 5

Nationality \*

France x

Select up to 2

CV \*

Test document.pdf

Browse

Test document.pdf

Max. file size is 1MB. Only PDFs accepted.

Please provide your CV with your application form (Europass format and English language are preferred)

I have a disability

I am over 18 \*

Figure 11: My Profile - personal Information (HO)

## Organisational Information

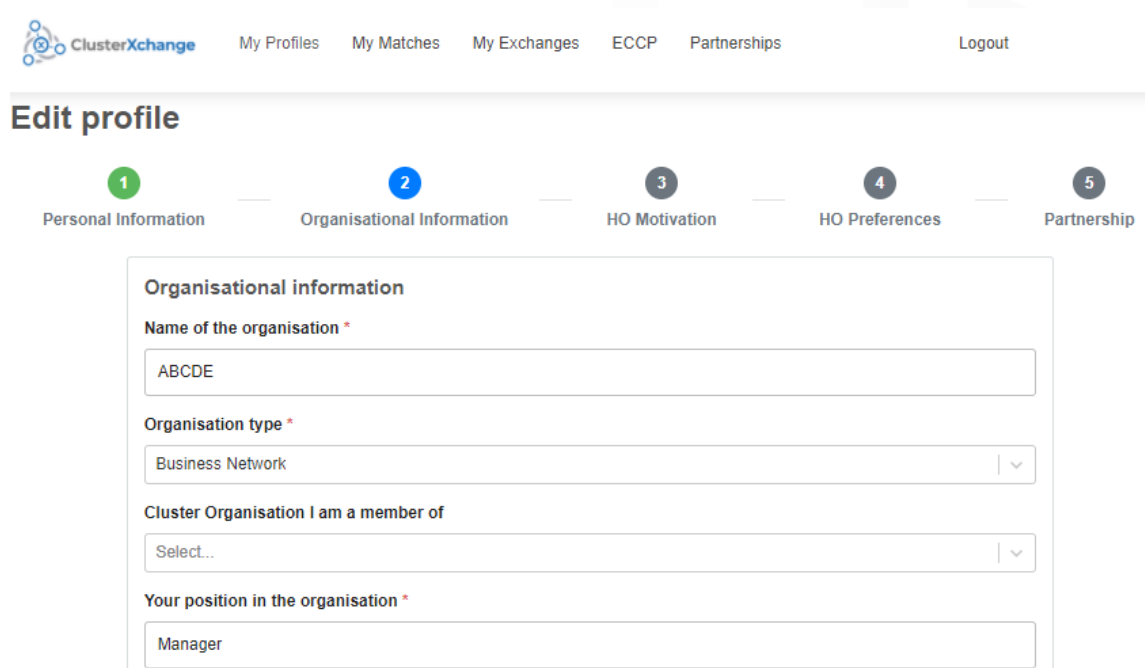
After submitting the personal information page, the system will take you to the organisational information. Here you are requested to fill in data about your organisation. Please note that the IT Tool is synchronised with the ECCP platform. In case your organisation does not have a profile on ECCP, by creating your profile on the IT Tool, your organisation will automatically be also profiled on ECCP.

In case your organisation has a profile on ECCP, the IT Tool will identify it and add it to your CXC profile. This may not happen in case your user account (email address and password you are logged in with on

the IT Tool) is not associated to your organisation’s ECCP profile. In such a case you will need to request the association of your user account first to your organisation’s ECCP profile. This can be done by requesting the administrator of the profile<sup>9</sup>. Contact details are generally included as part of the organisation profiles.

It is to be noted that a CXC profile (HO/VO) created on the IT Tool can be associated to only one user account (email and password). However, one user account enables the creation of several CXC profiles (for example in case the user is affiliated with more organisations). It is therefore, not possible to associate another user account to an already published CXC profile. Instead, the current CXC profile would need to be deleted in order to create a new one using the new user account.

The organisational form is included in Figure 12 and Figure 13. In addition to type, name, legal form, and address of the organisation, this is the place where you may indicate to which cluster organisation your organisation is a member of. If your cluster organisation is profiled on the ECCP, automatic filling will be proposed in related sections. The field on the sector of focus of the organisation allows to choose from over 50 options. The IT Tool allows selecting multiple sectors. However, it is suggested that the participants select only the most relevant ones. The last question is about the mission of the organisation to be entered in a maximum of 2500 characters. At the end of the form filling, the user must cross-check the information provided and complete the cells marked in Red.



The screenshot shows the 'Edit profile' page on the ClusterXchange platform. The navigation bar includes 'ClusterXchange', 'My Profiles', 'My Matches', 'My Exchanges', 'ECCP', 'Partnerships', and 'Logout'. The main heading is 'Edit profile'. Below it are five tabs: '1 Personal Information', '2 Organisational Information', '3 HO Motivation', '4 HO Preferences', and '5 Partnership'. The 'Organisational Information' tab is active. The form contains the following fields:

- Organisational information**
- Name of the organisation \***: Text input field containing 'ABCDE'.
- Organisation type \***: Dropdown menu with 'Business Network' selected.
- Cluster Organisation I am a member of**: Dropdown menu with 'Select...' selected.
- Your position in the organisation \***: Text input field containing 'Manager'.

Figure 12: My Profile - organisational information (1)

<sup>9</sup> You can read about the process here: <https://www.clustercollaboration.eu/user-guidelines#add-member>

**Legal Address**

**Street address \***

**City \***

**Postal Code \***

**Country \***

 ▼

**Sector(s) of activity - primary and secondary \***

Crop and animal production, hunting and related service activities x
Fishing and aquaculture x
x | ▼

Select maximum 2

**Legal Form**

**Description / Mission \***

2500 characters maximum, 2496 characters left

**Website (or any other official web link for the company)\***

**Brochure**

 Browse  

Max. file size is 1MB. Only PDFs

Previous
Next

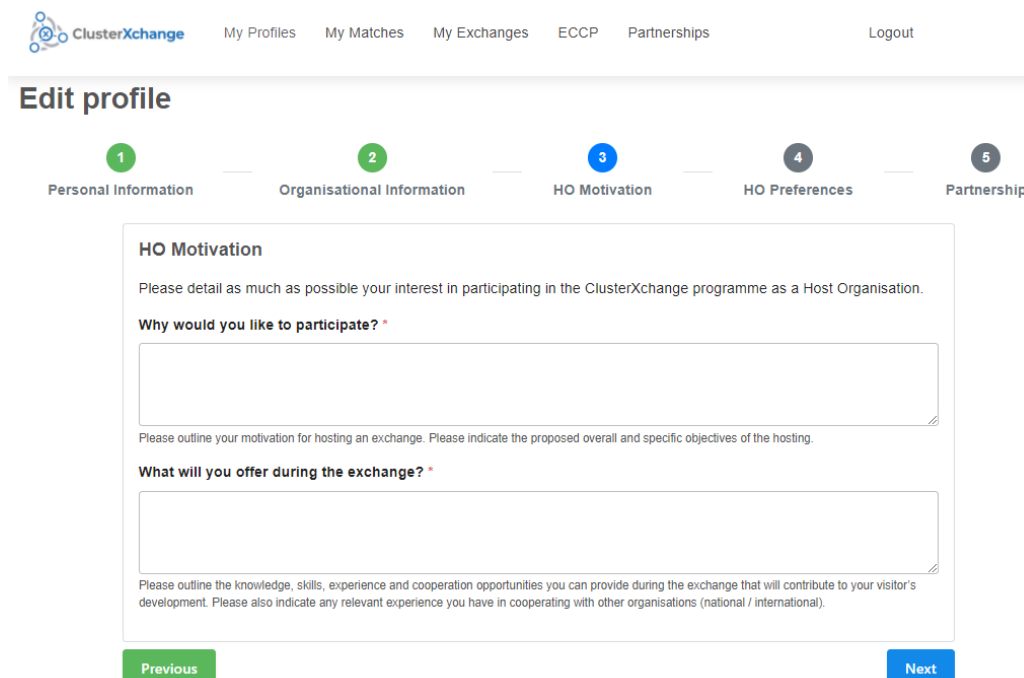
Figure 13: My Profile - organisational information (2)

## HO Motivation

A set of two questions (Figure 14) assess the motivation of the users to become HOs in an exchange under CXC. Users in their answers should cover aspects such as overall and specific objectives of the hosting, and the knowledge and skills foreseen to be provided during the exchange. Any prior relevant experience in cooperating with other organisations (national / international) should be shared and elaborated. A maximum of 2500 characters is allowed for each answer. Please note that this information is relevant for matching with a VO for an exchange (see Chapter 5) as these details will be visible by the VO profile owners that are registered in the IT Tool. This information, therefore, can be helpful for the counterpart VO in the matching phase to take a decision on whether to initiate/accept



a match with your HO profile. At the end of the form filling, the user must cross-check the information provided and complete the cells marked in Red.



**Edit profile**

1 Personal Information    2 Organisational Information    3 **HO Motivation**    4 HO Preferences    5 Partnership

**HO Motivation**

Please detail as much as possible your interest in participating in the ClusterXchange programme as a Host Organisation.

**Why would you like to participate? \***

Please outline your motivation for hosting an exchange. Please indicate the proposed overall and specific objectives of the hosting.

**What will you offer during the exchange? \***

Please outline the knowledge, skills, experience and cooperation opportunities you can provide during the exchange that will contribute to your visitor's development. Please also indicate any relevant experience you have in cooperating with other organisations (national / international).

Previous    Next

Figure 14: My Profile - HO motivation

## HO Preferences

The fourth page (Figure 15) of the profile is about visit related preferences and preferred VO characteristics from the HO's point of view. Here the user can select one of more types of preferred exchange types. The options available in the drop-down menu are:

- Learning
- Exploring new markets
- Common project/research
- Networking
- Group event
- Other

In this step you should also indicate your time availability for an exchange / for exchanges. Users are requested to fill the details such as the preferred duration of stay, timeframe of availability with as much precision as possible. It is advisable to enter a wide timeframe (example: from 1/02/2021 to 31/03/2021) to indicate that the VO can visit in that time period but not before or after. On the VO characteristics, you can indicate your preference of the spoken languages, countries of origin, organisation types and sectors. You can add multiple preferences in all these fields. At the end of the form filling, the user must cross-check the information provided and complete the cells marked in Red.



## Edit profile

1 Personal Information    2 Organisational Information    3 HO Motivation    4 HO Preferences    5 Partnership

**HO Preferences**

Please fill in the following fields. They will help us know what type of exchange you are looking for and the type of organisation you are most interested in collaborating with.

**Visit details**

**Preferred exchange types**

Common project/research x

**Preferred duration of the stay**

5 days

Exchanges have to be of at least 3 working days

**Timeframe of availability**    08/10/2020    11/11/2020

**Preferred characteristics of the Visiting Organisation**

**Preferred Languages**

English x German x

**Preferred Country of origin**

Netherlands x

**Preferred Organisation type**

Cluster Organisation x

**Preferred Sectors**

Forestry and logging x

Previous
Next

Figure 15: My Profile - HO preferences

## Partnership

The last step is to select a Partnership as a contact point. This is shown in Figure 16. The contact point will validate your profile and assist in your participation in CXC. The contact point can also be reached for any support. In the dropdown menu, an option, 'Automatic selection' also exists to let the system automatically select a Partnership for you. The selection is done using an algorithm.

## Edit profile

1

Personal Information

2

Organisational Information

3

HO Motivation

4

HO Preferences

5

Partnership

### Choose a Partnership

The European Strategic Cluster Partnerships for Excellence implement the ClusterXchange. Each covers specific sectors of activity and has different expertise.

In the ClusterXchange, the partnerships accompany the participants and serve as contact points during the entire duration of the exchanges.

Please click on this link to find out more about them: [Partnerships on the ECCP](#).

Choose one that you wish to have as your contact point to validate your profile and assist your participation in the ClusterXchange. If you do not know, which partnership to select, select the first option: "Automatic Assignment". This will assign a partnership to you automatically.

#### Select a Partnership \*

CE LIS

Previous

Next

Figure 16: My Profile - Partnership in charge of the HO (HOP)

### 3.3. STEP 3 – Submission and Validation

As the user submits the profile, the IT Tool provides an overview of the information. Figure 17 shows an example.

ClusterXchange My Profiles My Matches My Exchanges ECCP Partnerships Logout

### Host Organisation Profile

[Submit to Validation](#) [Go Back to form](#)

<p><b>Partnership</b></p> <p>TEST <a href="#">Profile</a></p>	<p><b>Organisation</b></p> <p>Business Network ABCDE Nice - France <a href="http://www.abode.in">http://www.abode.in</a> Sector: Crop and animal production, hunting and related service activities, Fishing and aquaculture</p> <p>Description / Mission test</p>
<p><b>Personal Information</b></p> <p>Sounding Board 11 <a href="#">Profile</a> Manager Spoken Languages: French CV: <a href="#">Test document.pdf</a></p>	<p><b>Preferences</b></p> <p>Availability: 08/10/2020 to 11/11/2020 Preferred duration: 5 days Sectors: Forestry and logging Country: Netherlands Spoken languages: English, German Exchange type: Common project/research</p>

**Motivation**

Why would you like to participate?  
test

What will you offer during the exchange?  
test

Figure 17: HO organisation profile overview

It is recommended that you review the entire profile once again in order to maintain consistency of information. The profile preview provides options to either submit the form for validation: 'Submit for validation' or to edit the form further 'Go back to form'. Figure 18 shows the message displayed after the user submits the profile for validation. The status on the IT Tool dashboard will then display that the profile is currently in review status.

ClusterXchange My Profiles My Matches My Exchanges ECCP Partnerships

You submitted your profile to validation successfully. [Back to home](#)

Figure 18: Final confirmation – profile submission for validation

Once a profile is submitted for validation, it can lead to three results:

- **Validation** - the profile gets accepted by the HOP (HO's Partnership contact point) and the user can proceed to matching
- **Rejection** - the profile gets rejected by the HOP and the user receives a reason for it

**Draft and resubmission** – the user will receive a message to complete and resubmit the profile

## 4. Registration guide for Visiting Organisations (VO)

### 4.1. STEP 1 – Eligibility check

It is important to make sure that the user complies with the CXC eligibility criteria and meets the minimum quality standards set by the scheme. It is the responsibility of the user to submit, complete comprehensive and accurate data in the IT Tool, and to assess if his/her application(s) is in line with the eligibility criteria described in this chapter. In the event of doubt, additional information may be requested from the SO. However, it should be noted that the EC – DG GROW and the EASME reserve the right to exclude applicants that are ineligible as per the established criteria or are not in line with the objectives of CXC.

#### Eligibility criteria

The first step before registering in the IT Tool is to check your eligibility as a participant in CXC. The eligibility criteria have been categorised into three types: A. Legal; B. Age; and C. Geographical.

#### A. Legal Criteria - The types of eligible organisations are:

- All cluster organisations<sup>10</sup> and business network organisations<sup>11</sup> from COSME participating countries (full list in Annex 2)
- SMEs from a COSME participating country that are cluster members. SME definition as per the EU is explained below.

---

<sup>10</sup> 'Innovation clusters' are defined in the Framework for State aid for research and development and innovation (2014/C 198/01) as "structures or organised groups of independent parties (such as innovative start-ups, small, medium and large enterprises, as well as research and knowledge dissemination organisations, non-for-profit organisations and other related economic actors) designed to stimulate innovative activity by promoting sharing of facilities and exchange of knowledge and expertise and by contributing effectively to knowledge transfer, networking, information dissemination and collaboration among the undertakings and other organisations in the cluster".

<sup>11</sup> See footnote 1 on page 9

### The European Union's SME definition

The European Union defines an SMEs as enterprises which fulfil the below criteria:

- Enterprise category: Small and medium-sized
- Head count < 250
- Turnover ≤ € 50 million Or Balance sheet total ≤ € 43 million

Besides the staff headcount ceiling, an enterprise will also qualify as an SME if it meets either the turnover ceiling or the balance sheet ceiling, but not necessarily both. Specific rules are applicable when calculating ceilings for enterprises which are not autonomous (partner or linked enterprises) and for publicly owned enterprises, which do not qualify as SMEs.

Further information about the EU's SME definition at: [http://ec.europa.eu/growth/smes/business-friendly-environment/sme-definition\\_en](http://ec.europa.eu/growth/smes/business-friendly-environment/sme-definition_en)

The SME definition document includes a model declaration that can be requested for enterprises whose qualification as SME is not clear.

Figure 19: European Union's definition of an SME

- Scaling-up support organisations from COSME participating countries that are cluster members: These include scaling-up support organisations<sup>12</sup>, research institutes, fab labs, digital innovation hubs<sup>13</sup>, creative hubs, resource-efficiency service providers<sup>14</sup>, incubators and accelerators. They comprise any public or private organisation that is providing access to the testing and validation of technologies and concepts, market intelligence as well as business incubation and acceleration support services in relation to the uptake of advanced technology, digitalisation, new business models, low-carbon and resource-efficient solutions, creativity and design and skills upgrading.

**Note: To take part in the scheme, all participants have to be registered with a validated profile on the ECCP platform. This profile can be created and validated through the CXC IT Tool or through the ECCP user account as these are interlinked. To take part in the scheme, all participants have to be linked to a validated Cluster Organisation profile on the ECCP, with the exception of Business networks. Participants profiling as Cluster Organisations on the CXC IT Tool need to use an ECCP user account associated as an administrator with the organisation's ECCP profile. Participants profiling**

<sup>12</sup> Numerous terms are used for "technology centres", such as innovation centres, science parks, technology parks, fab labs, co-working centres and so on. See also European Commission (2014) Setting up, managing and evaluation EU Science and Technology Parks: An advice and guidance report on good practice, [https://ec.europa.eu/regional\\_policy/sources/docgener/studies/pdf/stp\\_report\\_en.pdf](https://ec.europa.eu/regional_policy/sources/docgener/studies/pdf/stp_report_en.pdf) The European Commission has defined and mapped technology centres that provide services to SMEs to innovate with Key Enabling Technologies (KETs) as any public or private organisation capable of delivering research and innovation close-to-market services to SMEs from Technological Readiness Level (TRL) 3 to 8, but with at least one TRL >5. See <https://ec.europa.eu/growth/tools-databases/kets-tools/kets-tc/map>. For an explanation of TRL, see [https://ec.europa.eu/research/participants/data/ref/h2020/wp/2014\\_2015/annexes/h2020-wp1415-annex-g-trl\\_en.pdf](https://ec.europa.eu/research/participants/data/ref/h2020/wp/2014_2015/annexes/h2020-wp1415-annex-g-trl_en.pdf)

<sup>13</sup> Digital Innovation Hubs act as one-stop-shops where companies –especially SMEs, startups and mid-caps– can get access to technology-testing, financing advice, market intelligence and networking opportunities in relation to digital transformation and uptake of digital technologies. See also <https://ec.europa.eu/digital-single-market/en/digital-innovation-hubs> and <http://s3platform.jrc.ec.europa.eu/digital-innovation-hubs-tool>

<sup>14</sup> <https://www.resourceefficient.eu/en/support-organisations>

*as organisations that are members of a Cluster Organisation need to indicate the name of such Cluster Organisation in the "Cluster Organisation I am a member of" field of the Organisational Information step of the registration process.*

## B. Age Criteria

The user that represents the VO must be minimum 18 years old in order to have the legal capacity to sign agreements and to participate.

## C. Geographical Criteria

VOs must have their '**permanent residence**', as defined by CXC, in an EU Member State or in any of the other participating countries to participate CXC.

'Permanent residence' is defined as:

- The place where the organisation of the applicant is registered;
- If an organisation has several registered establishments in different EU Member States or other participating countries, the user should choose the country where he/she is based as his/her permanent residence.

Participation in CXC is not based on nationality or legal residence, therefore holding a specific nationality or legal residence status does not grant or deny a user the right to participate CXC.

### Third country nationals

Users representing eligible organisations who are not nationals of an EU Member State or of any of the participating countries can participate in CXC provided that they have spent 183 days in a participating country with a residence permit or equivalent document that allows them to reside in the country, and that they have the official capacity to represent an eligible organisation in the EU or any other participating country. If this condition is not fulfilled, they cannot participate in CXC.

Representatives of VOs in an exchange must ensure that they are allowed to stay in the HO's country and should themselves take care of complying with procedures linked to their visa/residence permit, where needed.

### EU outermost regions and Overseas Countries and Territories (OCTs)

Participants coming from or travelling to an outermost region, referred to in Article 349 TFEU<sup>15</sup>, or an OCT in the frame of CXC, will receive the maximum monthly lump sum allowance (as stipulated in Annex 1) to cover the extra costs incurred.

**NOTE: It should be noted that an organisation can participate as a VO only once per cycle (i.e. once under each call for proposals of the European Cluster Excellence Programme).** However, an organisation can host an exchange multiple times and simultaneously (group of exchanges).

---

<sup>15</sup> Article 349 of the Treaty on the Functioning of the European Union (therein Part 7 - General and Final Provisions) refers to the structural social and economic situation of Guadeloupe, French Guiana, Martinique, Réunion, Saint-Barthélemy, Saint-Martin, the Azores, Madeira and the Canary Island (the EU's outermost regions).

Sections 4.2 and 4.3 discuss in detail the process of profile creation, submission, and validation. Figure 20 presents a scheme to simplify and graphically explain these processes.

[www.clustercollaboration.eu](http://www.clustercollaboration.eu)



Partnership validation / action needed is highlighted in orange

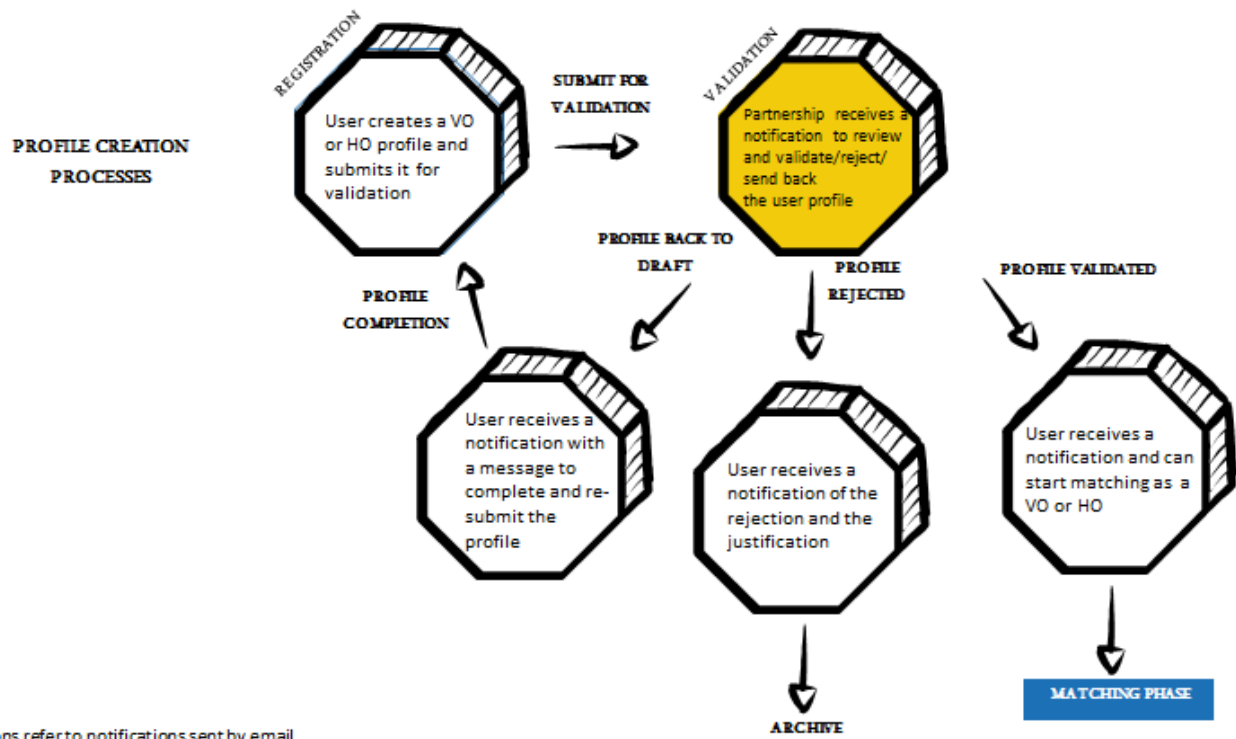
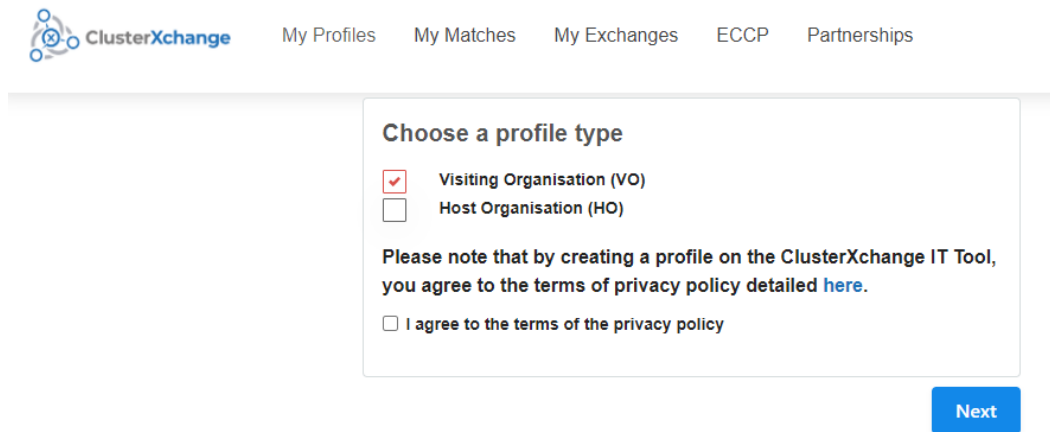


Figure 20: Overview of the processes involved (VO)



## 4.2. STEP 2 – My profile

Profile creation involves filling in a series of forms that request information on aspects relevant for the participation in CXC and for the communication with the Partnership contact point and the SO. These are presented further below in Figure 22. As a first step of profile creation, select the type of profile you wish to create on the IT Tool dashboard (Figure 21).



The screenshot shows the 'Choose a profile type' form. At the top left is the ClusterXchange logo. To its right are navigation links: 'My Profiles', 'My Matches', 'My Exchanges', 'ECCP', and 'Partnerships'. The main form area contains the following text and options:

**Choose a profile type**

- Visiting Organisation (VO)
- Host Organisation (HO)

Please note that by creating a profile on the ClusterXchange IT Tool, you agree to the terms of privacy policy detailed [here](#).

I agree to the terms of the privacy policy

[Next](#)

Figure 21: Choose a profile type (VO)

### Personal Information

As can be seen in Figure 22, the fields on Page 1 of profile creation include biographical details, contact information, nationality, spoken language portfolio, and CV upload. The users are requested to upload their full personal CVs with a maximum admissible size up to 1MB. There is an option towards the end of the page to tick mark if the user has a disability with space for a short explanation. Please note that VOs with a disability have different rules for the amount of the financial assistance under CXC. Information regarding any disability may also be important for the preparation of the visit as an HO.

#### Financial assistance rules for VOs with a disability

VOs with disabilities may benefit from the maximum monthly allowance to compensate for the extra costs linked to their specific situation - for example, a VO who requires to have a carer with them or a VO who has an increased cost for the transport as they need to transfer their wheelchair to the host country.

The VOP in-charge will assess visitors with disabilities on a case-by-case basis compiling an explanation on the decision to grant maximum amount of financial support. The VOs with disability should note that an official certificate for disability is not required and the submission of such a document does not automatically grant maximum financial support either.

At the end of the form filling, the user must cross-check the information provided and complete the cells marked in Red.

ClusterXchange My Profiles My Matches My Exchanges ECCP Partnerships Logout

### Edit profile

1 Personal Information 2 Organisational Information 3 VO Motivation 4 VO Preferences 5 Partnership

**Personal Information**

Please fill in the personal details of the person that will represent the organisation and participate in the exchange.

**First Name \***

**Last Name \***

**Email address \***

**Phone \***

**Spoken Languages \***

Maximum 5

**Nationality \***

Select up to 2

**CV \***

Test document.pdf

Max. file size is 1MB. Only PDF is accepted.

Please provide your CV with your application form (Europass format and English language are preferred)

I have a disability

I am over 18 \*

Figure 22: My Profile - personal Information (VO)

## Organisational Information

After submitting the personal information page, the system will take you to the organisational information. Here you are requested to fill in data about your organisation. Please note that the IT Tool is synchronised with the ECCP platform. In case your organisation does not have a profile on ECCP, by creating your profile on the IT Tool, your organisation will automatically be also profiled on ECCP.

In case your organisation has a profile on ECCP, the IT Tool will identify it and add it to your CXC profile. This may not happen in case your user account (email address and password you are logged in with on the IT Tool) is not associated to your organisation's ECCP profile. In such a case you will need to request the association of your user account first to your organisation's ECCP profile. This can be done by requesting the administrator of the profile<sup>16</sup>. Contact details are generally included as part of the organisation profiles.

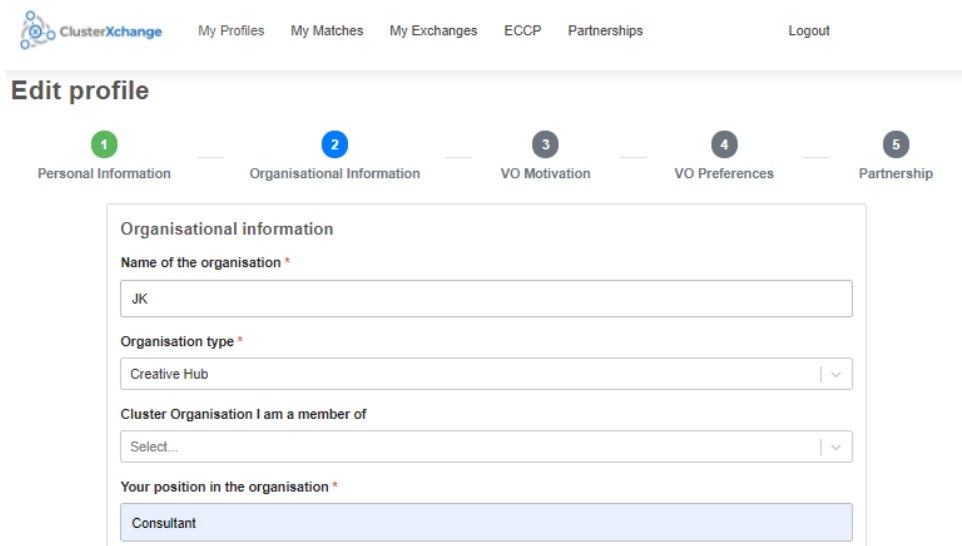
It is to be noted that a CXC profile (HO/VO) created on the IT Tool can be associated to only one user account (email and password). However, one user account enables the creation of several CXC profiles (for example in case the user is affiliated with more organisations). It is therefore, not possible to

<sup>16</sup> You can read about the process here: <https://www.clustercollaboration.eu/user-guidelines#add-member>

associate another user account to an already published CXC profile. Instead, the current CXC profile would need to be deleted in order to create a new one using the new user account.

The organisational form is included in Figure 23 and Figure 24. In addition to type, name, legal form, and address of the organisation, it is also the place where you may indicate which cluster organisation you are a member of.

The field on the sector of focus of the organisation allows to choose from over 50 options. The IT Tool allows selecting multiple sectors. However, it is suggested that the participants select only the most relevant ones. The last question is about the mission of the organisation to be entered in a maximum of 2500 characters. At the end of the form filling, the user must cross-check the information provided and complete the cells marked in Red.



**Edit profile**

ClusterXchange My Profiles My Matches My Exchanges ECCP Partnerships Logout

1 Personal Information    2 **Organisational Information**    3 VO Motivation    4 VO Preferences    5 Partnership

**Organisational information**

**Name of the organisation \***

JK

**Organisation type \***

Creative Hub

**Cluster Organisation I am a member of**

Select...

**Your position in the organisation \***

Consultant

Figure 23: My Profile - organisational information (VO) (1)

Legal Address

**Street address \***

**City \***

**Postal Code \***

**Country \***

 ▾

**Sector(s) of activity - primary and secondary \***

Fishing and aquaculture × ▾

Select maximum 2

**Legal Form**

**Description / Mission \***

2500 characters maximum, 2496 characters left

**Website (or any other official web link for the company)\***

**Brochure**

Browse

Max. file size is 1MB. Only PDFs

Previous
Next

Figure 24: My Profile - organisational information (VO) (2)

## VO Motivation

A set of four questions (Figure 25) assess the motivation of participants planning to be involved as VOs in an exchange under CXC. Users in their answers should cover aspects such as overall and specific objectives of participation, and the knowledge and skills foreseen to be provided during the exchange. Any prior relevant experience in cooperating with other organisations (national / international) should be shared and elaborated. A maximum of 2500 characters is allowed for each answer. Please note that this information is relevant for matching with an HO for an exchange (see Chapter 5) as these details will be visible by the HO profiles profile owners that are registered in the IT Tool. This information, therefore, can be helpful for the counterpart HO in the matching phase to take a decision on whether

to initiate/accept a match with your HO profile. At the end of the form filling, the user must cross-check the information provided and complete the cells marked in Red.

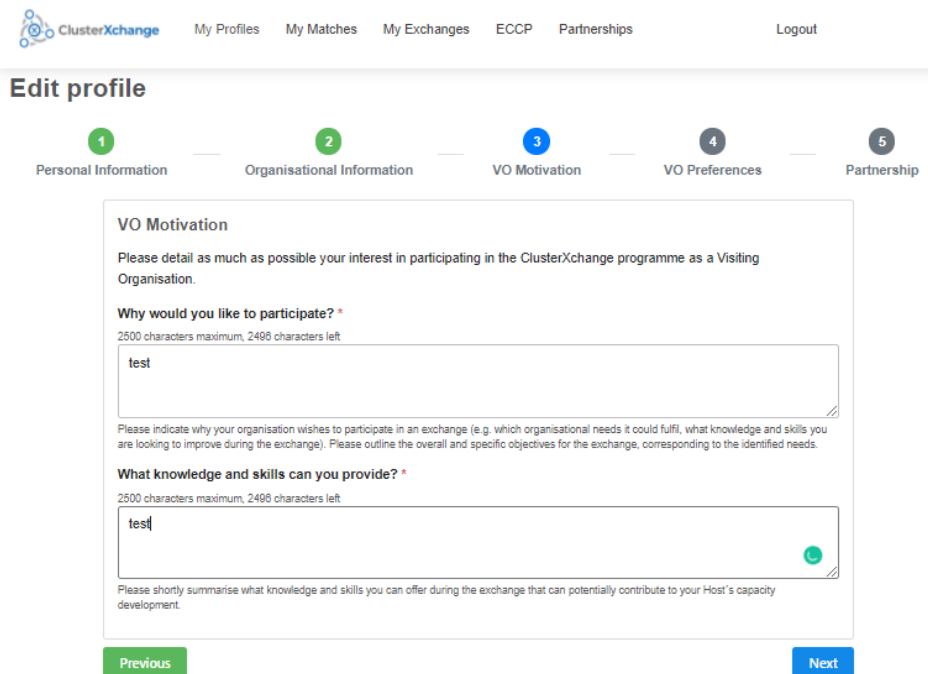


Figure 25: My Profile - VO motivation

## VO Preferences

The fourth page (Figure 26) of the profile is about visit related preferences and preferred HO characteristics from the VO's point of view.

Here the user can select one or more types of preferred exchange types. The options available in the drop-down menu are:

- Learning
- Exploring new markets
- Common project/research
- Networking
- Group event
- Other

In this step you should also indicate your time availability for an exchange / for exchanges. Users are requested to fill the details such as the preferred duration of stay, timeframe of availability with as much precision as possible. It is advisable to enter a wide timeframe (example: from 1/02/2021 to 31/03/2021) so that the HOs can have more scope to suggest and schedule their time periods accordingly. On the HO characteristics, you can indicate your preference of the spoken languages, countries of origin, organisation types and sectors. You can add multiple preferences in all these fields.

At the end of the form filling, the user must cross-check the information provided and complete the cells marked in Red.

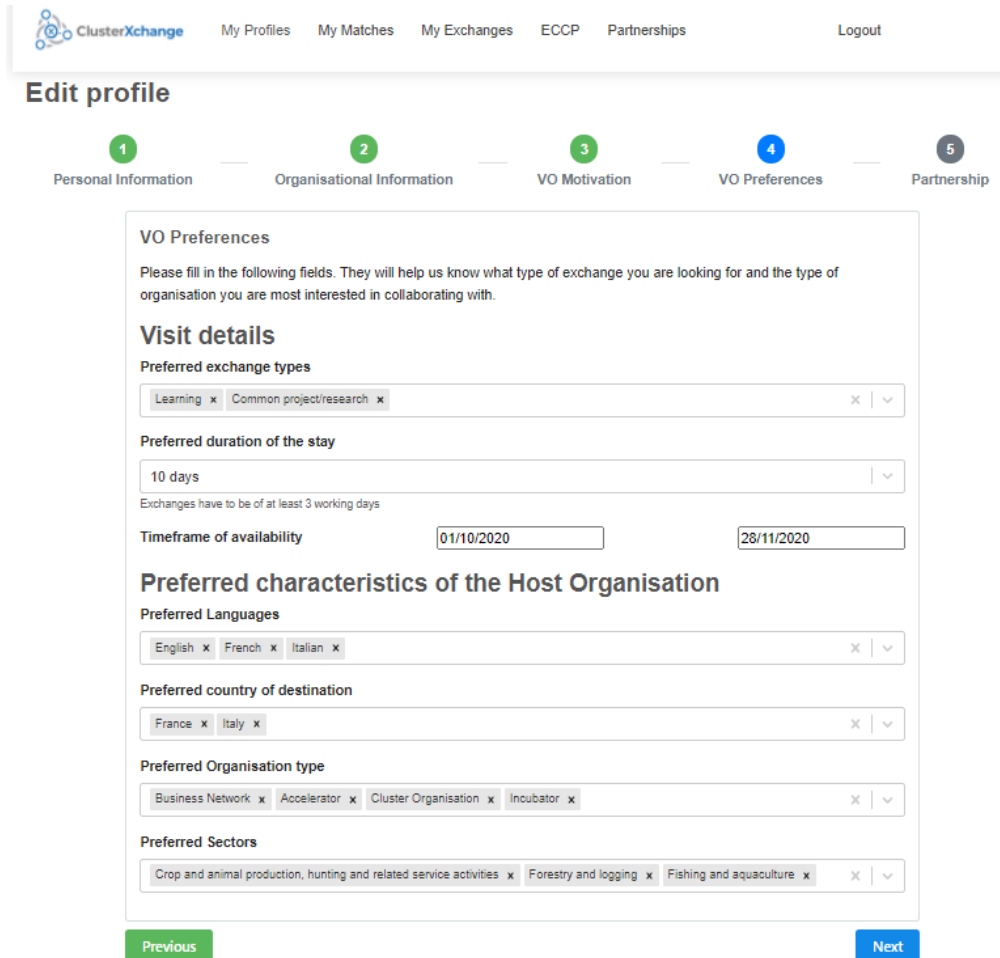


Figure 26: My Profile - VO preferences

## Partnership

The last step is to select a Partnership as a contact point. This is shown in Figure 27. The contact point will validate your profile and assist in your participation in CXC. The contact point can also be reached for any support. In the dropdown menu, an option, 'Automatic selection' also exists to let the system automatically select a Partnership for you. The selection is done using an algorithm.

## Edit profile

- 1 Personal Information
- 2 Organisational Information
- 3 VO Motivation
- 4 VO Preferences
- 5 Partnership

### Choose a Partnership

The European Strategic Cluster Partnerships for Excellence implement the ClusterXchange. Each covers specific sectors of activity and has different expertise.

In the ClusterXchange, the partnerships accompany the participants and serve as contact points during the entire duration of the exchanges.

Please click on this link to find out more about them: [Partnerships on the ECCP](#).

Choose one that you wish to have as your contact point to validate your profile and assist your participation in the ClusterXchange. If you do not know, which partnership to select, select the first option: "Automatic Assignment". This will assign a partnership to you automatically.

#### Select a Partnership \*

BRILLIANT

Previous

Next

Figure 27: My Profile - Partnership in charge of the VO (VOP)

## 4.3. STEP 3 – Submission and Validation

As the user submits the profile, the IT Tool provides an overview of the information. Figure 28 shows an example.

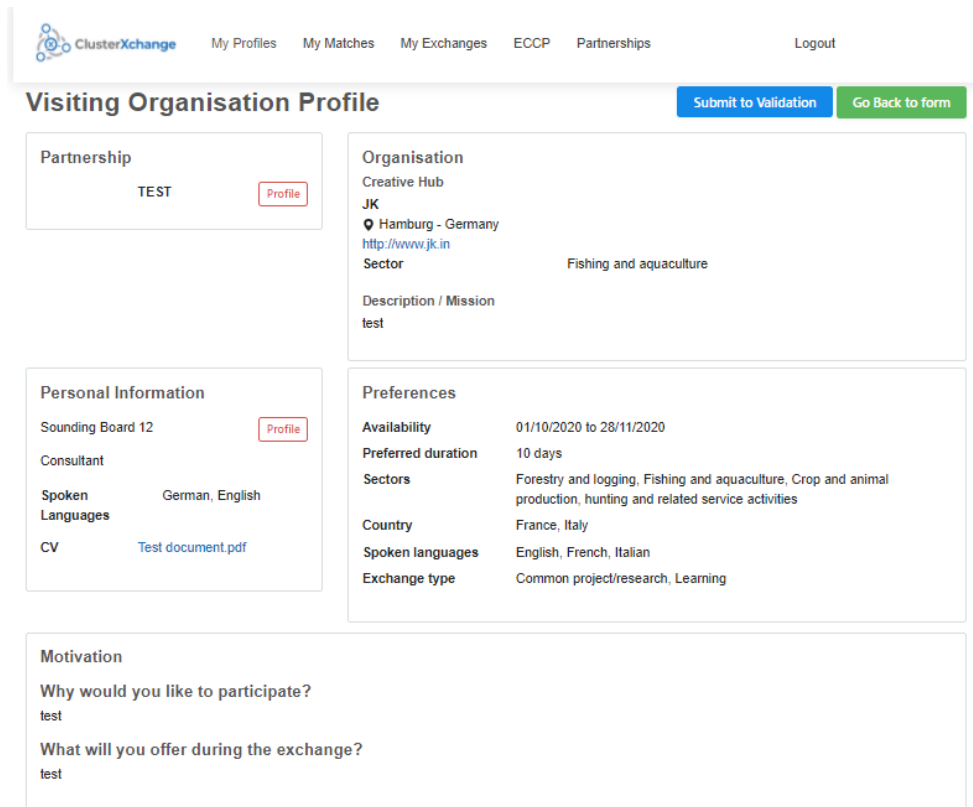


Figure 28: VO organisation profile overview

It is suggested that you review the entire profile once again in order to maintain consistency of information. The profile preview provides options to either submit the form for validation: 'Submit for validation' or to edit the form further 'Go back to form'. Figure 29 shows the message displayed after the user submits the profile for validation. The status on the IT Tool dashboard will then display that the profile is currently in review status.

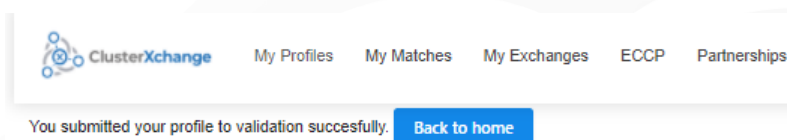


Figure 29: Final confirmation – profile submission for validation

Once a profile is submitted for validation, it can lead to three results:

- **Validation** - the profile gets accepted by the VOP (VO's Partnership contact point) and the user can proceed to matching
- **Rejection** - the profile gets rejected by the VOP and the user receives a reason for it
- **Draft and resubmission** – the user will receive a message to complete and resubmit the profile



## 5. Participation

This chapter explains in detail the process of participation in CXC (matching and exchange building and execution) after the user profiles are created, submitted and validated. The Partnership contact points intervene to validate certain milestones and move the process forward.

As depicted by Figure 30, the process involves several checkpoints requesting information or validation regarding certain aspects. The validated user profiles initiate a match with other user profiles. After a match is validated (accepted) by both the HO and VO profiles, exchange building starts. As part of exchange building, an exchange is prepared for approval. After the final approval of the VO and HO, the HOP and VOP review and validate it. The EC may also randomly review and validate a built exchange. Once the exchange gets validated, the exchange moves to the exchange execution phase. Under this phase, the main checkpoint is reporting after the exchange concludes. All these will be discussed in detail in the sections to follow.

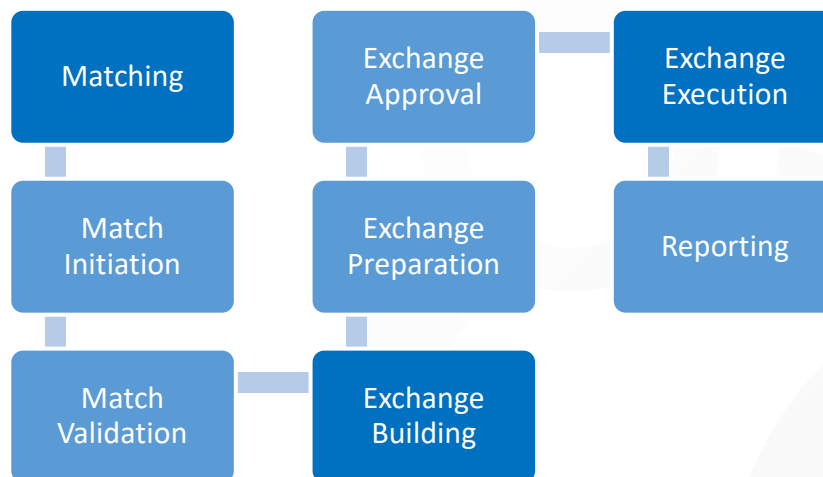
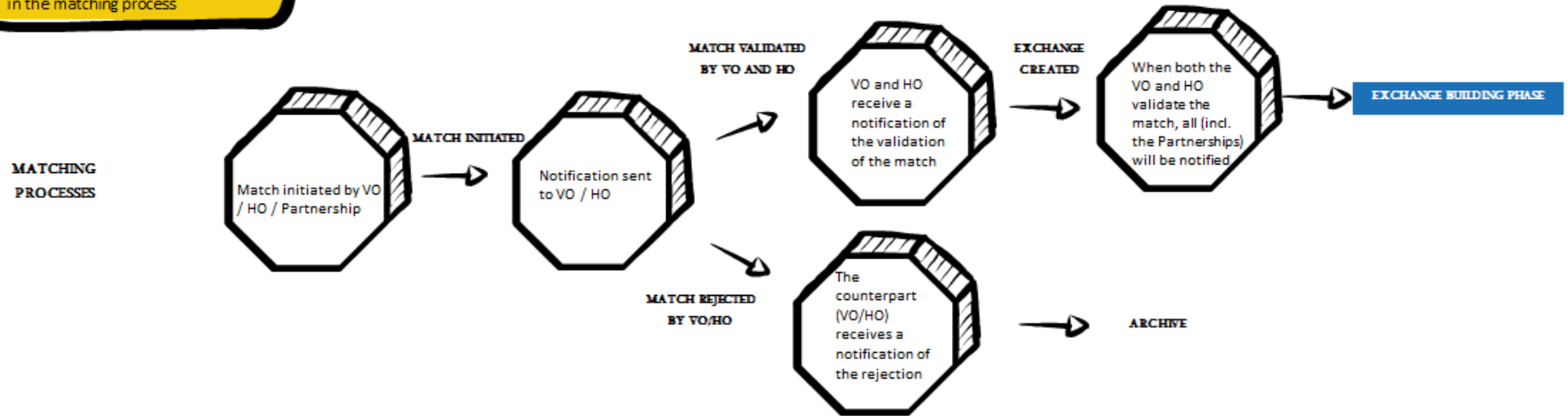


Figure 30: Matching and Exchange building and execution steps in the IT Tool

### 5.1. Matching

After the HO or VO profile is validated by the Partnership contact point, you will receive an email notification conveying that you can proceed to search for a suitable match. The processes involved in the matching phase are included in Figure 31.

No Partnership validation is required in the matching process

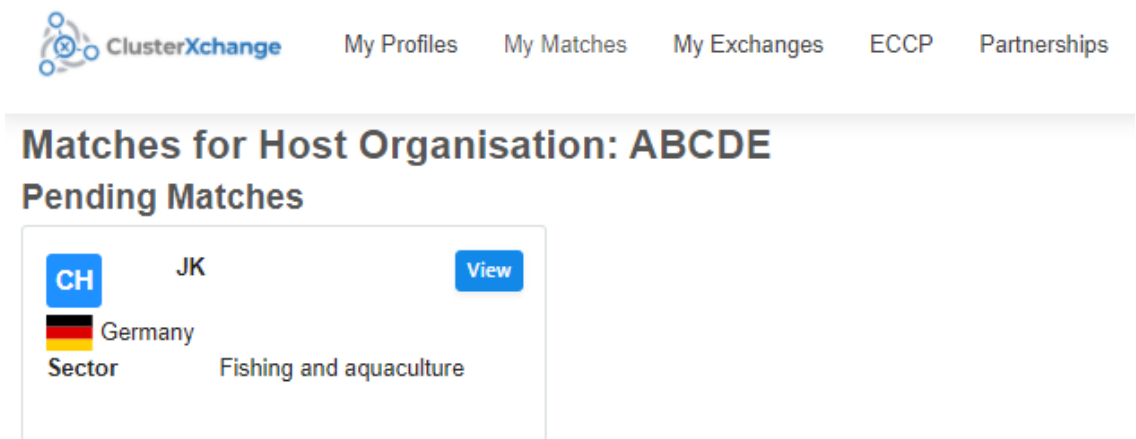


\*All notifications refer to notifications sent by email

Figure 31: Matching process diagram

## STEP 1 – View the matches

To view all matches for all user profiles, click on the 'My Matches' menu. The list shows pending matches as well regarding those for which no actions were taken yet. An example is presented in Figure 32. In order to go back to the database of all counterpart profiles for a user profile (HO/VO), please click on the “Find Matches” button.

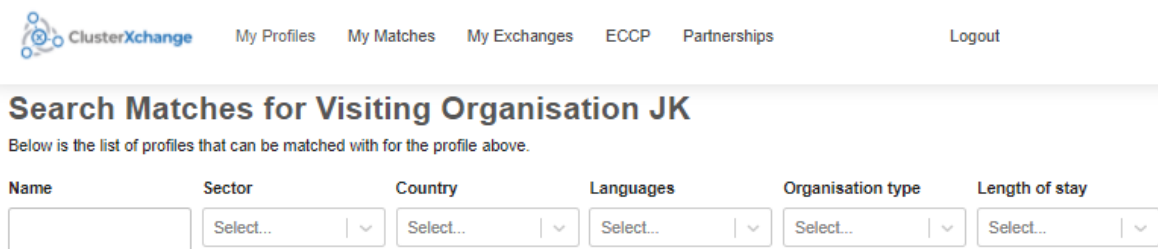


The screenshot shows the 'My Matches' section of the ClusterXchange platform. At the top, there is a navigation bar with 'ClusterXchange', 'My Profiles', 'My Matches', 'My Exchanges', 'ECCP', and 'Partnerships'. Below this, the main heading is 'Matches for Host Organisation: ABCDE' with a sub-heading 'Pending Matches'. A single match card is displayed, featuring a blue 'CH' flag icon, the name 'JK', and a 'View' button. Below the name, it shows the German flag and the text 'Germany', and further down, 'Sector Fishing and aquaculture'.

Figure 32: Pending matches for the HO

## STEP 2 – Search for matches

When a profile is published in the CXC IT Tool, the system will perform an automated calculation to give it a score in relationship with other profiles of the IT Tool. As the user clicks on the validated profile (View Button), the IT Tool displays a button with the name 'Find Matches'. The webpage to search matches appears that allows the user to view a list of organisations registered in the IT Tool for the opposite profile with designated scores (matching score formula in Annex 3). For example, an HO will be able to see only the VO profiles registered in the IT Tool and vice versa. The types of filters that exist in the IT Tool to search for matching according to the participant's preferences are shown in Figure 33.



The screenshot shows the 'Search Matches for Visiting Organisation JK' page. It features a navigation bar with 'ClusterXchange', 'My Profiles', 'My Matches', 'My Exchanges', 'ECCP', 'Partnerships', and 'Logout'. Below the navigation bar, the heading is 'Search Matches for Visiting Organisation JK' with a sub-text: 'Below is the list of profiles that can be matched with for the profile above.' There are six filter categories, each with a dropdown menu: 'Name' (empty text input), 'Sector' (Select...), 'Country' (Select...), 'Languages' (Select...), 'Organisation type' (Select...), and 'Length of stay' (Select...).

Figure 33: Types of filters provided for matching

After the search is performed, the preview page lists information about the organisations with their respective match scores based on the preferences filled in by the HOs or the VOs (Figure 34). The match score rating is calculated automatically by the IT Tool. It is a score out of 100 and a colour coding of Red, Yellow, and Green suggests the suitability of the possible match. The profiles in Red have scores

below 60, the ones in Yellow have scores from 60 to 80 and those in Green from 80 to 100. It should be noted that higher the score, more the profile is considered to be suited.

#### Available matches

Organisation	Organisation Type	Country	Sector	Partnership	Spoken Languages	Match Score *	Actions
ABCDE	Business Network	France	Crop and animal productio...	TEST	French	75	<a href="#">View</a>
Blue Green	Incubator	France	Extraction of crude petrole...	TEST	Croatian	65	<a href="#">View</a>
Research Madrid	Research Institute	Spain	Air transport, Forestry and ...	TEST	English, Spanish	52.5	<a href="#">View</a>
SMEEEE	Small and mediu...	Cyprus	Manufacture of furniture, ...	TEST	Galician	52.5	<a href="#">View</a>
Special lab	Fab-lab	Portugal	Sewerage, Civil engineering	TEST	Portuguese, English	40	<a href="#">View</a>

Rows per page: 10 1-5 of 5

\* The match score is an automatically calculated percentage of affinity with the other profile. It is a score out of 100. The higher is the score, the more the profile is considered to be well suited. For more information, please consult the ClusterXchange IT tool user manual link at the bottom of this page.

Figure 34: List of available organisations

## STEP 3 - Perform and conclude matches

As part of the search process, you can view the complete profiles of the listed organisations by clicking the 'View' button. On the profile page of the selected organisation (Figure 35), you can initiate the match by clicking the 'Initiate Match' button or go back to the list by clicking the 'Go Back' button. In case of clicking the 'Initiate Match' button, the chosen counterpart profile owner will receive an email notification of the initiated match. A HO or VO profile owner can initiate multiple matches.

Visiting Organisation JK

[Initiate Match](#)

[Go Back](#)

<p><b>Partnership</b></p> <p>TEST <a href="#">Profile</a></p>	<p><b>Organisation</b></p> <p>Business Network ABCDE Nice - France <a href="http://www.abcde.in">http://www.abcde.in</a> Sector: Crop and animal production, hunting and related service activities, Fishing and aquaculture</p> <p>Description / Mission test</p>
<p><b>Personal Information</b></p> <p>Sounding Board 11 <a href="#">Profile</a> Manager Spoken Languages: French CV: <a href="#">Test document.pdf</a></p>	<p><b>Preferences</b></p> <p>Availability: 08/10/2020 to 11/11/2020 Preferred duration: 5 days Sectors: Forestry and logging Country: Netherlands Spoken languages: English, German Exchange type: Common project/research</p>
<p><b>Motivation</b></p> <p>Why would you like to participate? test</p> <p>What will you offer during the exchange? test</p>	

Figure 35: VO initiating a match with an HO

After clicking the 'Initiate Match' button in the previous step, a validation screen (Figure 36) appears that provides a synopsis of the match. In this page you have various options. You can accept the match by clicking the 'Accept Match' button. In this case, the match gets approved by you, the initiator. You also have the option to cancel the match by clicking the 'Cancel Match' button.

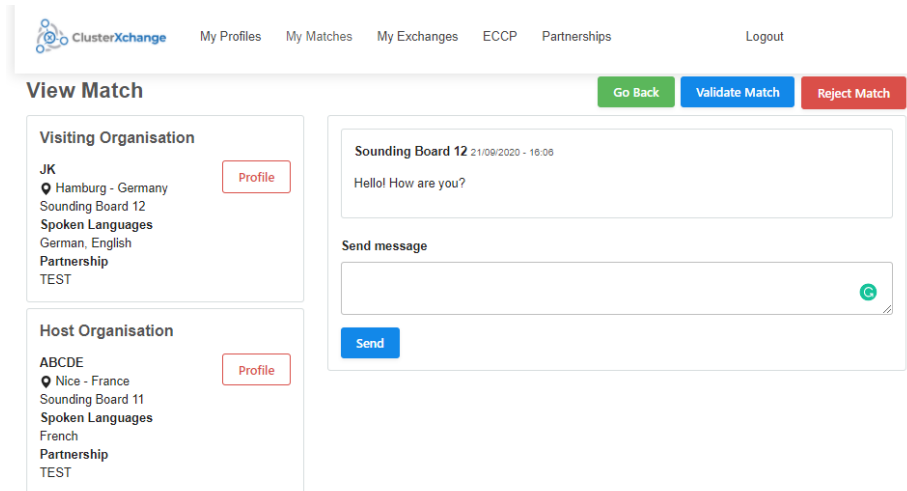


Figure 36: Initial validation by the VO

When accepting a match by clicking the 'Validate Match' button, the counterpart profile owner receives an email notification calling for validation (acceptance). Therefore, if there is a match pending to be validated, the HO/VO will be prompted by the IT Tool to take action. When the counterpart profile owner validates the match, it moves to the exchange building phase and a notification email will be sent to both the HO and the VO, as well as the Partnership(s) in charge.

In case of rejecting the match by clicking the 'Cancel Match' button, the counterpart profile owner will receive an email notification.

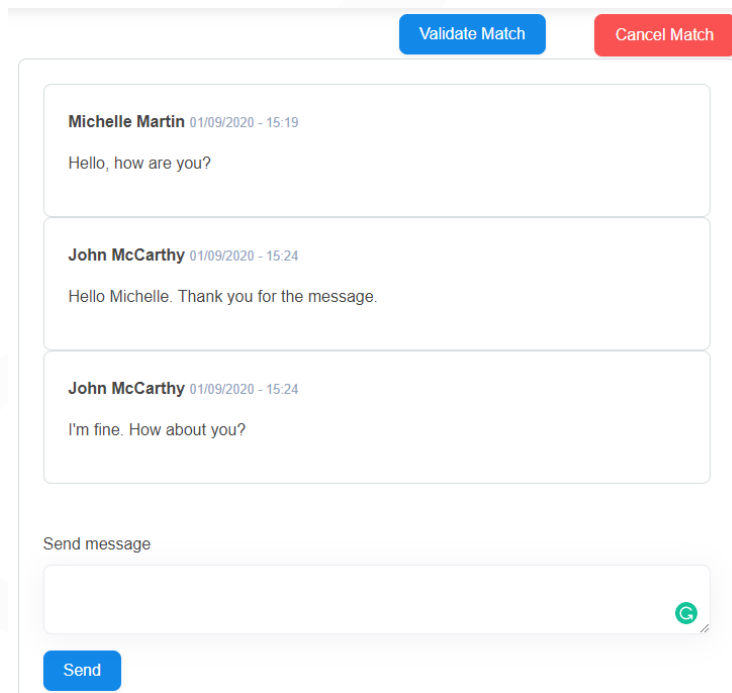


Figure 37: Chat facility enabled by the IT Tool

Figure 37 shows that before accepting or cancelling the match, you can also send a message to the counterpart profile owner through the chat feature of the IT Tool in order to clarify any doubts relevant for the match. Notifications of these messages are sent by email to the counterpart profile owner.

After the match is also accepted by the counterpart profile owner, the match is deleted from the 'My Matches' menu point and moves to the "My Exchanges" menu point as an active exchange.

#### IMPORTANT NOTE

If a VO has multiple matches with different HOs and has validated one or more, the first HO to approve the match will trigger the closing of all the other matches of the VO.

## 5.2. Exchange Building

The exchange building process involves the preparation and approval of physical exchanges (visits). Figure 38 shows the process.

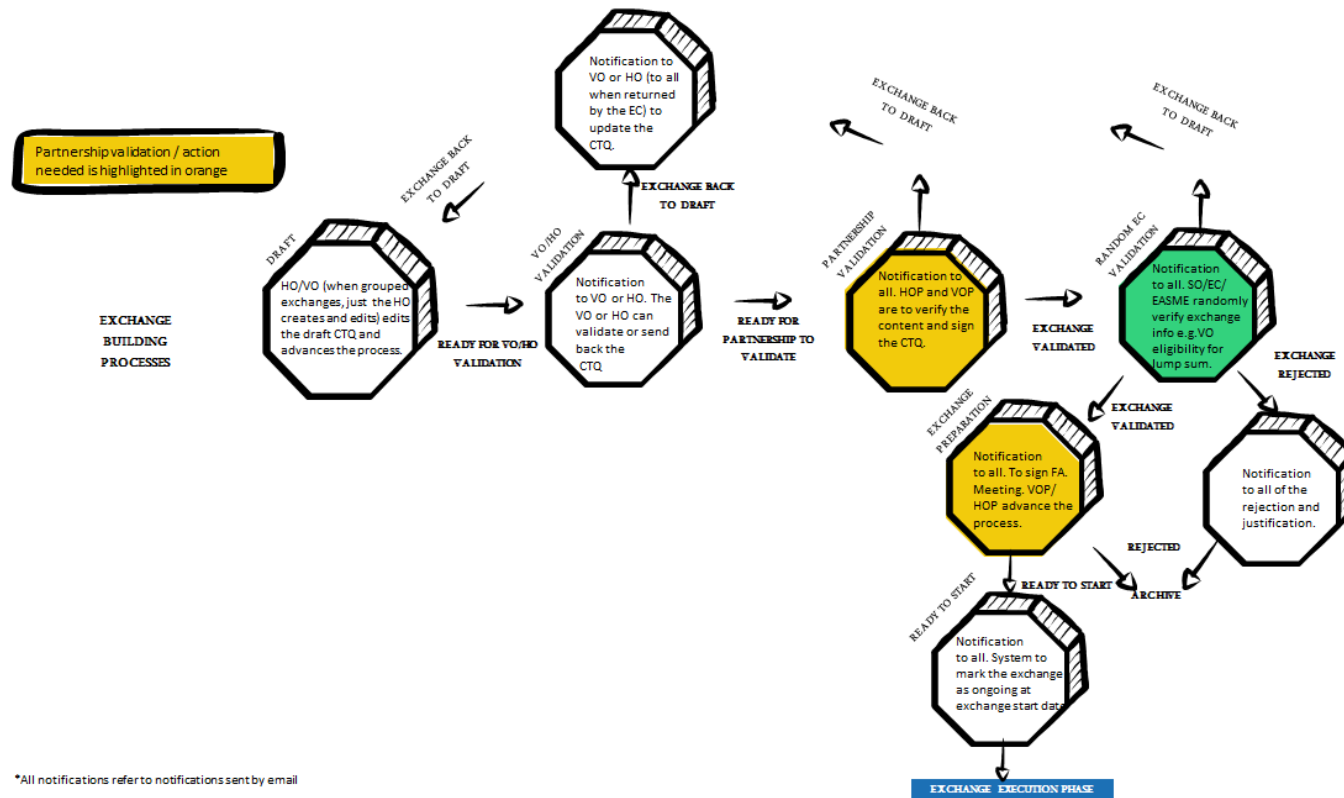


Figure 38: Exchange Building process



## STEP 1 – View the exchange

The exchanges can be viewed under the 'My Exchanges' menu point. By clicking the 'View' button, you can open each individual exchange independently (in case of the VO, only one exchange is available to view). The initial preview of the exchange can be seen in Figure 39. It can be seen that each exchange has a reference number (EG70TA3 in this case).

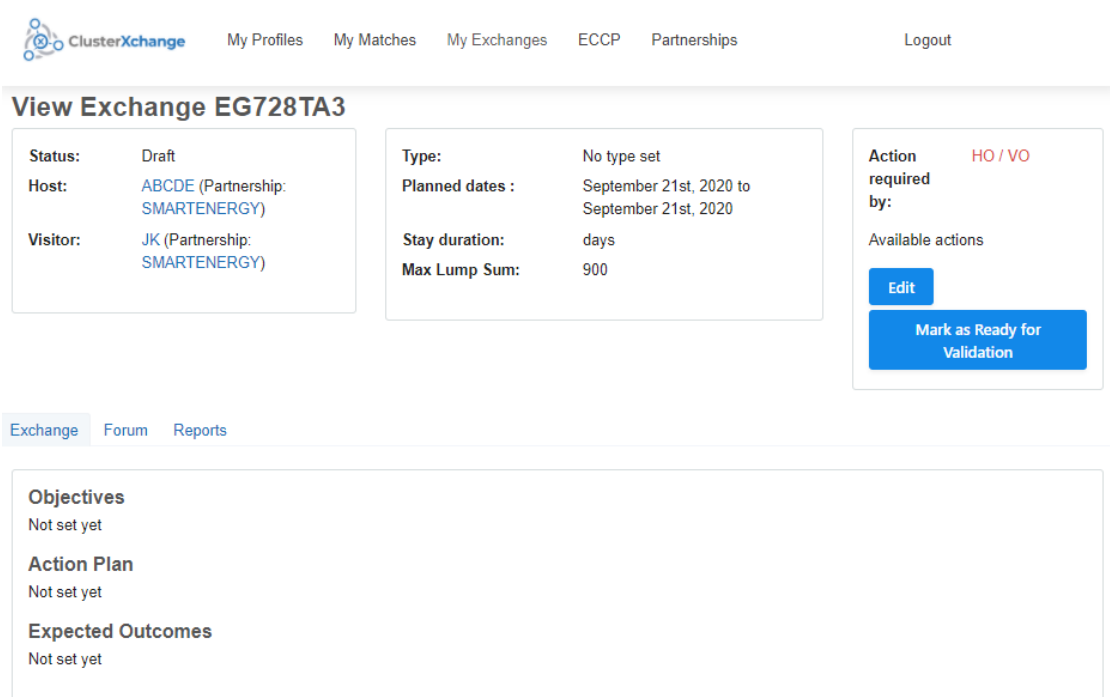


Figure 39: Overview of the exchange

The initial box shows the status of the exchange and the participants. The second box displays the exchange type, dates, duration and the maximum lump sum of the financial assistance the VO is eligible to receive as a reimbursement (the lump sum is not visible for the HO). The lump sum is calculated automatically by the IT Tool based on the indicated exchange characteristics. In case the VO is a Partnership beneficiary, no lump sum is calculated. The third box on the 'View Exchange' page indicates what action is required as a next step and by whom. In this box, all the available actions for the users are also displayed.

The exchange page also provides information through the following tabs:

- **Exchange:** The objectives, action plan and expected outcomes are included in this tab. These are to be established by the participants (e.g. proposed by the HO and approved by the VO) after the match is made. Please note that the information encoded in these sections will be retrieved and transferred in the draft "Commitment to Quality" by the IT Tool.
- **Forum:** Forum includes three different threads - host country information, exchange visit details, and general discussion. It is a chat facility to facilitate exchange building and execution.

The Exchange Forum is available for communication for both the exchange participants and the Partnerships. They receive notifications for the messages posted. It can be used for communication with the involved parties in addition to email/phone communication as necessary.

- **Reports:** All reporting documentation (VO and HO activity report templates) will be available under this tab and can be accessible only after the exchange is concluded.

The steps of building an exchange are described below. The steps include the ones to be implemented by the participants and also others that will be implemented by the VOP, HOP and by the EC services / SO, in case the exchange is selected for a random check. The steps contain indications on where the participants have to intervene and where they do not have actions to perform.

Each step is also correlated with an exchange status as it is displayed in the IT Tool. By moving from one step to the other, the status of the exchange will also move.

## STEP 2 – Edit the exchange (Draft status)

The exchange edit form is available when the exchange is in the 'Draft' status and can be accessed via the 'edit' button in the 'Available actions' section of the exchange view. The exchange can, therefore, be edited on the IT Tool.

It is the responsibility of the HO and VO to develop and cross-check the details of the exchange that will be included as part of the 'Commitment to Quality' document. The 'Commitment to Quality' is an agreement between the parties (HO, VO, HOP, VOP) on the details and terms of the exchange and signed by the representatives of all these parties. An example template is included in Annex 4.

The following fields regarding an exchange must be edited and completed in the Commitment to Quality:

- Type of exchange
- Planned start and end dates
- Objectives
- Action Plan
- Expected Outcomes

### Exchange Group:

An exchange can be bound together with other exchanges. This is called an Exchange Group. In this case, several exchanges will take place at the same time and hosted by the same HO. In this case, the HO is also in charge of creating an Exchange Group on the IT Tool by clicking the 'Add to Exchange Group' (Figure 40). The IT Tool allows to Add/Remove exchanges to/from a group.

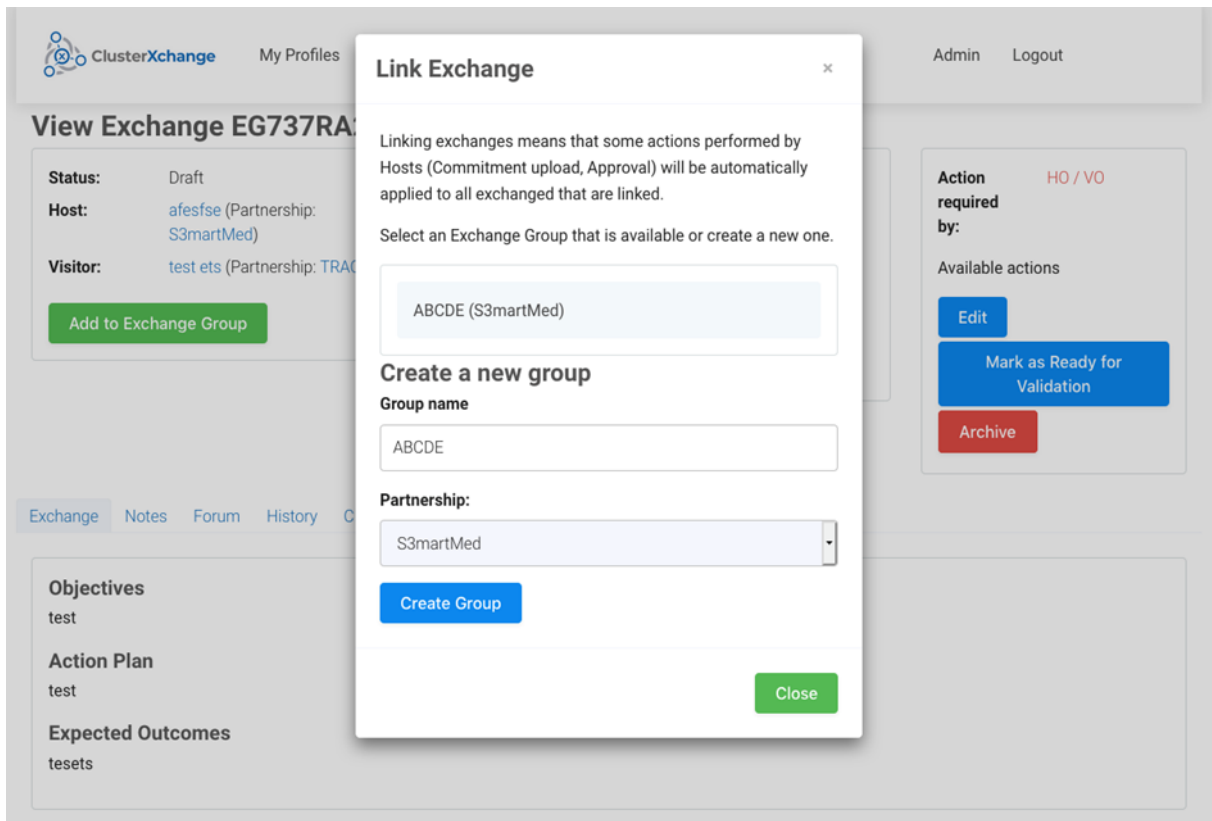


Figure 40: Creating an Exchange Group

If the exchange is in an Exchange Group, only the HO can edit the Commitment to Quality fields. Otherwise, both the HO and the VO have the permission to edit.

After the exchange is edited, it needs to be approved by both participants (HO and VO). When the Commitment to Quality contents are complete, either the VO or HO can send it for approval to the counterpart – VO/HO by clicking 'Mark as Ready for Approval'. In case of an Exchange Group, the HO clicks this button and the action will be applied to all exchanges in the group.

### STEP 3 – Approve the exchange by the VO/HO (Ready for Approval status)

The exchange gets this status from the 'Mark as Ready for Approval' action of the previous step. An email notification will be sent to the counterpart (VO/ HO, or only to the VOs when exchanges are grouped) with a request to review the Commitment(s) to Quality. The counterpart can perform two actions at this stage actions 1) Sign and Approve the Commitment to Quality; 2) Send the Commitment to Quality Back to draft

#### 1) Sign and Approve the Commitment to Quality

If the counterpart agrees with the Commitment to Quality, he/she can download, sign, upload the signed Commitment to Quality (more information on the signature process is below), and then approve it by clicking the 'Approve' action button to move to the next status. For grouped exchanges, the exchanges will have to be approved by all the VOs so to move to the next status. It is possible to

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remove an exchange from a group along the way, **but this action is not reversible**. An exchange can be added / re-added though in case all the other exchanges in the group are in draft status.

It is up to the participants (VO and HO) to decide how they organise the signature of the Commitment to Quality. Below are two possible ways to do the same.

- Signature in one step
  - It is possible to download the document, introduce the scanned signatures of both participants, and upload to the IT Tool a fully signed pdf Commitment to Quality document.
  - If no scanned signatures are available, it is also possible to download the document, print the pages to be signed individually by the participants, sign them, digitalise and add them to the Commitment to Quality, and finally reupload the fully signed pdf Commitment to Quality document to the IT Tool.
  
- Signature in two steps

It is possible to download the document by one participant, introduce the scanned signature (you can also use the print procedure explained above) and then upload the signed pdf Commitment to Quality document to the IT Tool. In this case, the other participant can then download the uploaded and signed Commitment to Quality to add his/ her signature using the same procedure above and then upload it to the IT Tool.

## 2) Send the Commitment to Quality Back to draft

If the counterpart does not agree with the Commitment to Quality, he/she can send the exchange back to draft by clicking the 'Back to draft' action button (notification is sent by email to the counterpart).

If the participant considers that the contents of the Commitment to Quality are not complete and send the exchange back to the Draft status, the IT Tool prompts to submit an explanation on the motivation for why sending the exchange back to draft. Figure 41 shows a preview of the message.

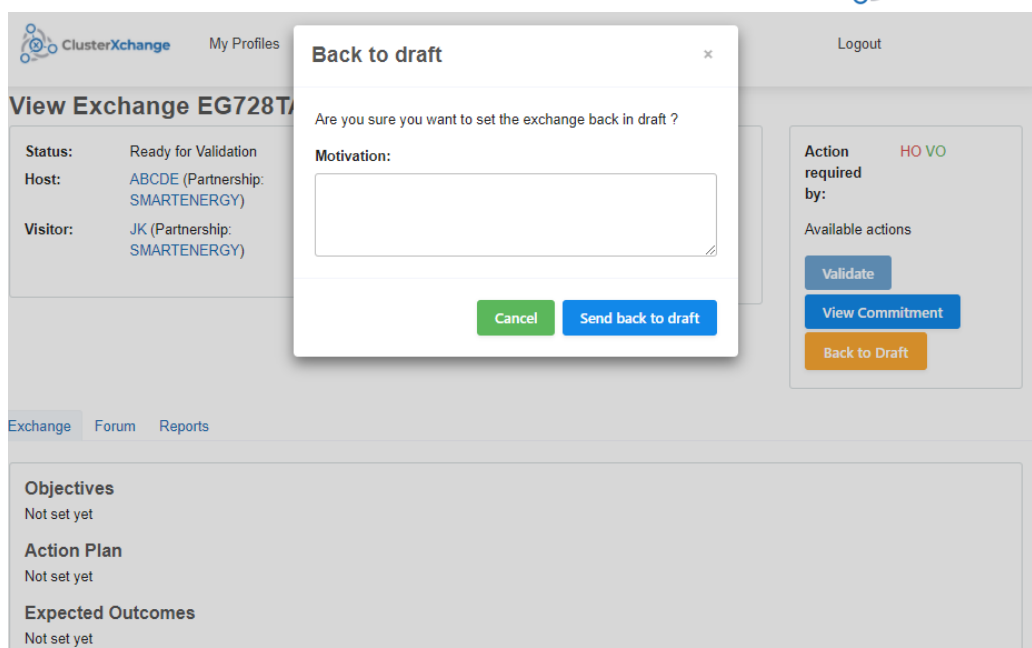


Figure 41: Sending the exchange back to draft

## STEP 4 – Approve the exchange by the Partnership(s) (Partnership approval status)

In this status the HO and VO have no actions to perform on the IT Tool.

The exchange gets this status when both participants click on the 'Approve button' of the previous step. The HOP and VOP have to act in this status. The HOP and VOP will review the data entered by the HO/VO in the Commitment to Quality and verify signatures. They can perform two action in the IT Tool:

1. Send back to draft, if not in agreement with the contents of the Commitment to Quality. In this case, the HO and VO will receive an email notification and a request to implement the modifications. The exchange will get back to Draft status (explained before in the same section). The HO and VO will have to modify, sign again and activate the 'Approve' action button so that the Commitment to Quality is returned to the HOP and VOP in the requested format.
2. Sign the Commitment to Quality, if in agreement with its contents and then approve it to move to the next status.

## STEP 5 – Approve the exchange by the EC (EC approval status)

In this status the HO and VO have no actions to perform on the IT Tool.

The exchange gets this status when both VOP and HOP have approved the exchange and the exchange **is randomly selected** for a check by the EC services and the CXC SO. As a result of the random check:

1. The exchange can be sent back to draft (requesting more details or modifications). In this case, the HO and VO will receive an email notification and a request to implement the modifications.

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The exchange will get back to Draft status (explained before in the same section). The HO and VO will have to modify, sign again and activate the 'Approve' action button so that the Commitment to Quality is returned to the HOP and VOP for their signature and approval.

2. The exchange can be approved and thus moves into the next status (Preparation). An email notification will be sent to the HO and VO.
3. The exchange can be rejected. An email notification will be sent to the HO and VO.

## STEP 6 – Prepare the exchange (Preparation status)

In this status the HO and VO have to act together with the VOP and HOP to prepare the visit. However, the HO and VO have no specific actions to perform on the IT Tool.

The exchange is in this status when approved (validated) by all parties and is ready for the preparatory stage. In case the VO is entitled to receive lump sum financial assistance, the Financial Agreement (example template in Annex 5) document is to be downloaded by the VOP and VO in a word format from the IT Tool. They should customise it offline, sign both if the contents are agreeable, and then create a pdf and upload back to the IT Tool. This procedure will be led by the VOP.

The Financial Agreement is to set the conditions for the provision of financial assistance by the VOP to the VO to cover some of the expenses of participation in an exchange within the framework of CXC at the HO premises.

In this status, the VOP and HOP can mark the exchange as ready to start or archive the exchange, if it is decided that the exchange does not move ahead.

## STEP 7 – Start the exchange (Ready to start status)

In this status the HO and VO have no actions to perform on the IT Tool. The exchange is ready to commence. The IT Tool automatically marks the exchange as ongoing when the exchange date is reached. A notification to all involved parties will be sent by email. The Partnership(s) will verify the status of the exchange in practice. In case the exchange does not take place in reality due to unforeseen circumstances, it should be marked as a failed exchange by the VO and HO in the Final Activity Report feedback form (please see the Exchange execution phase further below). Any other alterations to the exchange (e.g. date change), should also be indicated in the Final Activity Report feedback form (please see the Exchange execution phase further below).

## 5.3. Exchange Execution

The exchange execution process refers to the phase which involves the commencement of and finalisation of physical exchanges (visits). Figure 42 below shows the exchange execution process.



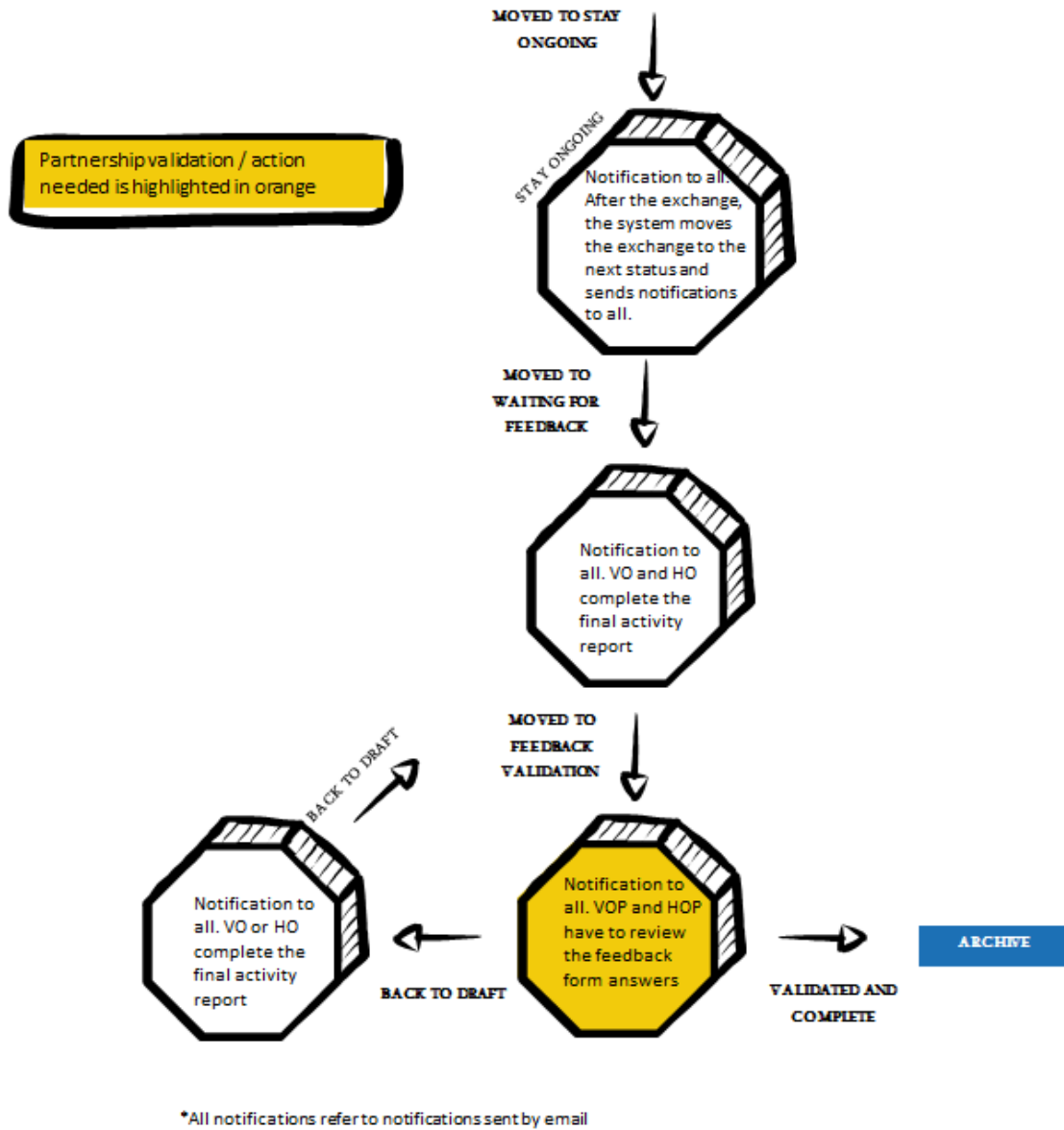


Figure 42. Exchange execution process

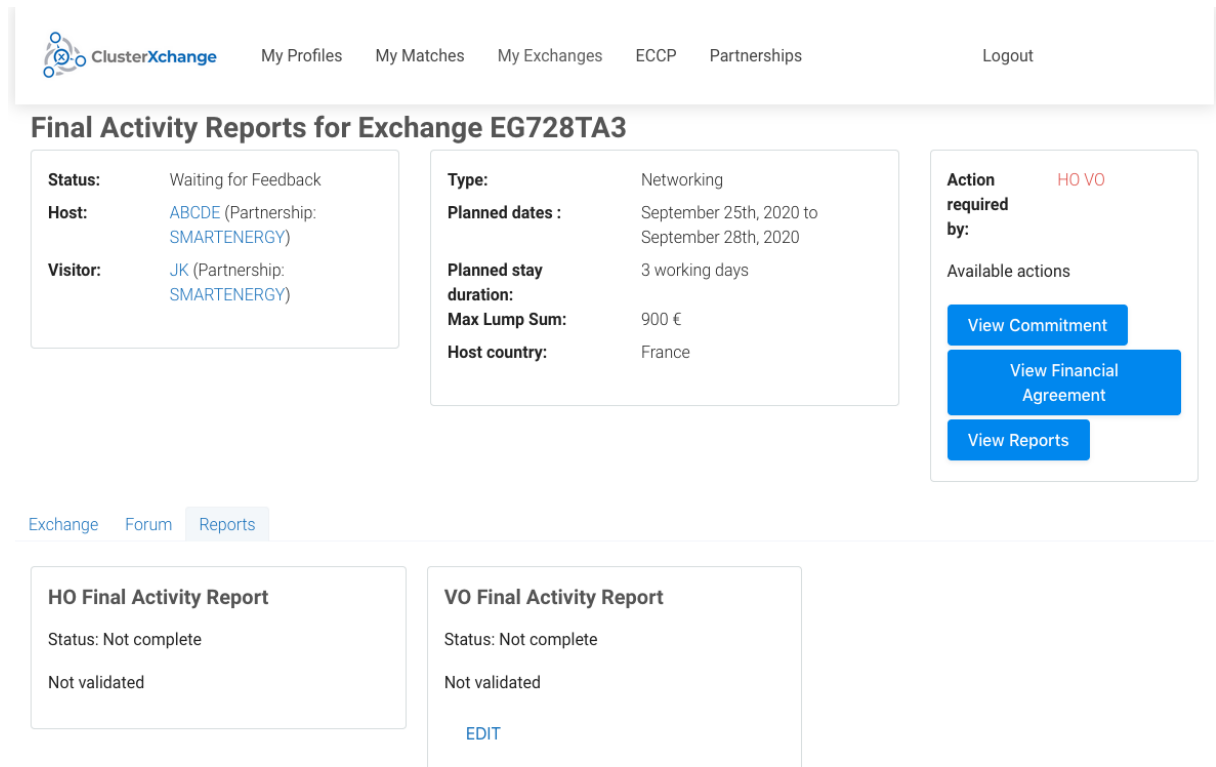
The exchange execution steps and respective exchange statuses are explained below.

### STEP 1 – Perform the exchange (Stay ongoing status)

In this status the HO and VO have no actions to perform on the IT Tool. This refers to an exchange that is currently ongoing. The system will automatically mark the exchange as ‘Waiting for Feedback’ after the planned exchange dates have passed.

## STEP 2 – Report on the exchange (Waiting for feedback status)

After the exchange has taken place, the exchange is set to the 'Waiting for feedback' status and the HO and the VO have to provide feedback regarding the exchange by clicking the 'View Reports' button. In Figure 43 you can see a preview of this.



The screenshot shows the 'Final Activity Reports for Exchange EG728TA3' page. At the top, there is a navigation bar with 'ClusterXchange', 'My Profiles', 'My Matches', 'My Exchanges', 'ECCP', 'Partnerships', and 'Logout'. Below the navigation bar, the page title is 'Final Activity Reports for Exchange EG728TA3'. The main content is divided into three columns:

- Left Column:**
  - Status:** Waiting for Feedback
  - Host:** ABCDE (Partnership: SMARTENERGY)
  - Visitor:** JK (Partnership: SMARTENERGY)
- Middle Column:**
  - Type:** Networking
  - Planned dates :** September 25th, 2020 to September 28th, 2020
  - Planned stay duration:** 3 working days
  - Max Lump Sum:** 900 €
  - Host country:** France
- Right Column:**
  - Action required by:** HO VO
  - Available actions:**
    - View Commitment
    - View Financial Agreement
    - View Reports

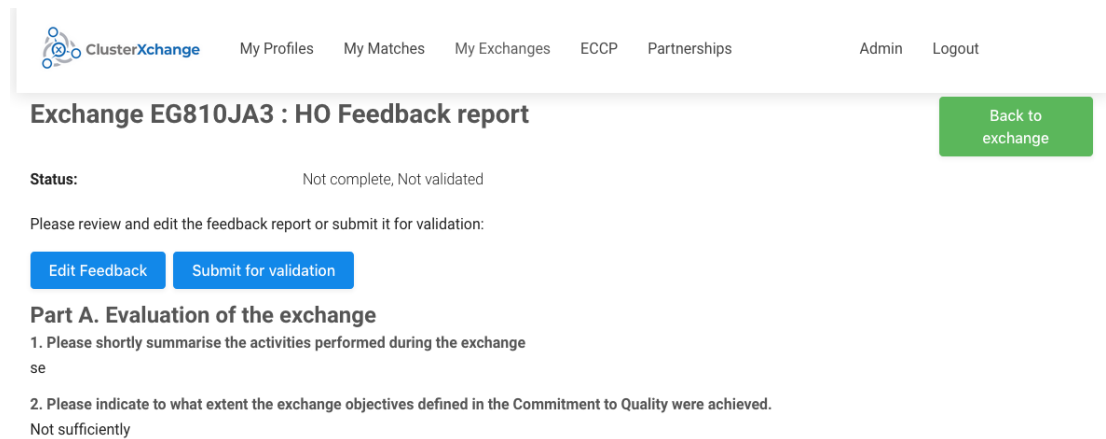
Below the main content, there are two tabs: 'Exchange', 'Forum', and 'Reports'. Under the 'Reports' tab, there are two boxes:

- HO Final Activity Report:** Status: Not complete, Not validated.
- VO Final Activity Report:** Status: Not complete, Not validated, with an 'EDIT' button.

Figure 43: Reporting after the exchange

The feedback report is filled in online on the IT Tool. After completing the feedback report, you will have the opportunity to review/edit the data entered by clicking the 'Edit Feedback' in a review screen and submit the report for validation by the Partnership(s) by clicking the 'Submit for Validation' as shown in Figure 44.





ClusterXchange My Profiles My Matches My Exchanges ECCP Partnerships Admin Logout

**Exchange EG810JA3 : HO Feedback report** [Back to exchange](#)

**Status:** Not complete, Not validated

Please review and edit the feedback report or submit it for validation:

[Edit Feedback](#) [Submit for validation](#)

**Part A. Evaluation of the exchange**

1. Please shortly summarise the activities performed during the exchange
2. Please indicate to what extent the exchange objectives defined in the Commitment to Quality were achieved.

Not sufficiently

Figure 44: HO feedback reporting

After the VO and HO submit their respective feedback reports (final activity reports), the process goes into the feedback validation phase.

### STEP 3 – Complete the exchange (Feedback Validation status)

After the VO and HO submit their respective feedback reports, Partnerships in charge are required to review the reports and provide comments/suggestions.

The HOP and VOP can send the feedback form back to draft. In this case, the HO/VO will receive an email notification and will be requested to update the report and submit again for validation by their Partnership(s). If they consider the feedback reports complete, the HOP and VOP can also validate (approve) the reports. Only the final validated reports are considered approved and are then archived. Also, it is only after the report validation that the VOs are entitled to receive the lump sum reimbursements associated with the exchange.

## 6. Annexes

### Annex 1 – Lump sums paid to the VOs

This list is fixed during the implementation of the projects selected under the European Cluster Excellence programme call for proposals (COS-CLUSTER-2018-03-02).

Monthly Financial Assistance (Lump sum) paid by the Partnership(s) to VOs	
Country of stay (Host country)	Amount per month (€)
Albania	530
Armenia	610
Austria	900
Belgium	830
Bosnia and Herzegovina	560
Bulgaria	560
Croatia	720
Cyprus	780
Czechia	610
Denmark	1100
Germany	830
Estonia	670
Finland	950
North Macedonia	560
France	900
Greece	780
Hungary	670
Iceland	900
Ireland	1000
Italy	900
Kosovo <sup>17</sup>	560
Latvia	610
Lithuania	560
Luxembourg	830
Malta	720
Moldova	530
Montenegro	560
Netherlands	830
Poland	610
Portugal	780

<sup>17</sup> This designation is without prejudice to positions on status, and is in line with UNSCR 1244(1999) and the ICJ Opinion on the Kosovo declaration of independence.

<b>Monthly Financial Assistance (Lump sum) paid by the Partnership(s) to VOs</b>	
<b>Country of stay (Host country)</b>	<b>Amount per month (€)</b>
Romania	560
Serbia	560
Slovakia	610
Slovenia	720
Spain	830
Sweden	950
Turkey	750
Ukraine	530
United Kingdom	1000
Visiting organisations from/to: Outermost Regions of the EU (referred to in Article 349 TFEU) <sup>18</sup> and Overseas Countries and Territories (referred to in Article 198 TFEU) <sup>19</sup>	1100
Visitors with disabilities (regardless of the country of stay)	1100

<sup>18</sup> [http://ec.europa.eu/regional\\_policy/en/policy/themes/outermost-regions/](http://ec.europa.eu/regional_policy/en/policy/themes/outermost-regions/)

<sup>19</sup> [http://ec.europa.eu/europeaid/regions/octs\\_en](http://ec.europa.eu/europeaid/regions/octs_en)

## Annex 2 – List of COSME countries

Albania	Lithuania
Armenia	Luxembourg
Austria	Malta
Belgium	Moldova
Bosnia and Herzegovina	Montenegro
Bulgaria	Netherlands
Croatia	Poland
Cyprus	Portugal
Czechia	Romania
Denmark	Serbia
Germany	Slovakia
Estonia	Slovenia
Finland	Spain
North Macedonia	Sweden
France	Turkey
Greece	Ukraine
Hungary	United Kingdom
Iceland	Outermost Regions of the EU (referred to in Article 349 TFEU) <sup>20</sup>
Ireland	Overseas Countries and Territories (referred to in Article 198 TFEU) <sup>21</sup>
Italy	
Kosovo	
Latvia	

<sup>20</sup> [http://ec.europa.eu/regional\\_policy/en/policy/themes/outermost-regions/](http://ec.europa.eu/regional_policy/en/policy/themes/outermost-regions/)

<sup>21</sup> [http://ec.europa.eu/europeaid/regions/octs\\_en](http://ec.europa.eu/europeaid/regions/octs_en)

## Annex 3 – Matching Score Formula

The score will be based on the similarity between the following common fields in the VO, HO profiles:

- **Objectives of the exchange – two out of five categories (Learning, Exploring new markets, Common project/research, Networking, Others – to specify):** compare the primary and secondary objectives of each profile and the preferred/secondary objectives of the counterpart
  - 100: HO primary objective = VO preferred objective **and** HO preferred objective = VO primary objective
  - 90: HO primary objective = VO preferred objective **or** HO preferred objective = VO primary objective
  - 80: HO primary objective is in the secondary objective list of the VO **and** VO primary objective is in the secondary objective list of the HO
  - 70: HO primary objective is in the secondary objective list of the VO **or** VO primary objective is in the secondary objective list of the HO
  - 40: No matches
- **Country:** compare the origin country of one profile to the preferred/secondary country of origin of the counterpart.
  - 100: HO origin country = VO preferred country **and** VO origin country = HO preferred country
  - 90: HO origin country = VO preferred country **or** VO origin country = HO preferred country
  - 80: HO origin country is in the secondary country list of the VO **and** VO origin country is in the secondary country list of the HO
  - 70: HO origin country is in the secondary country list of the VO **or** VO origin country is in the secondary country list of the HO
  - 40: No matches
- **Sector/Domain:** compare the primary and secondary sectors of activity of each profile and the preferred/secondary sector of the counterpart
  - 100: HO primary sector = VO preferred sector **and** HO preferred sector = VO primary sector
  - 90: HO primary sector = VO preferred sector **or** HO preferred sector = VO primary sector
  - 80: HO primary sector is in the secondary sector list of the VO **and** VO primary sector is in the secondary sector list of the HO
  - 70: HO primary sector is in the secondary sector list of the VO **or** VO primary sector is in the secondary sector list of the HO
  - 40: No matches

- **Expected length and availability:** compare the desired duration of stay and the availability (dates) in both profiles.
  - 100: the duration of the stay is equal in both profiles and their availability overlap completely
  - 90: there is at most one week of discrepancy between the availability/duration of the profiles
  - 70: there is at most 2 weeks of discrepancy between the availability/duration of the profiles
  - 50: there is at most 3 weeks of discrepancy between the availability/duration of the profiles
  - 20: there is more than 3 weeks of discrepancy between the availability/duration of the profiles
- **Communication languages:** compare the spoken languages of the VO and HO
  - 100: both have the same mother tongue
  - 90: one of the secondary languages of one is the mother tongue of the other
  - 80: both have a common secondary language
  - 40: no matches
- **Requested languages:** compare the requested spoken languages with the counterpart
  - 100: the VO speaks one of the languages requested by the HO or the HO did not specify a preferred language
  - 0: the VO does not speak any languages requested by the HO

Matching criteria will be weighed depending on their importance. This ponderation will be changeable by IT administrators in order to make the system more useful based on the data that is entered over time. The following criteria weights:

Criteria	Objectives	Communication languages	Keywords	Requested languages	Sector	Expected length and availability	Country
Weight	3	2	1	2	3	3	2

The formula used to calculate the matching score is as follows.

$$((\text{Score}_1 \times \text{Weight}_1) + \dots + (\text{Score}_N \times \text{Weight}_N)) / \text{SUM}$$

## Annex 4 – Template of the Commitment to Quality

### Details of the Visiting Organisation

Name of the representative participating in the exchange:	
Name of the organisation:	
Name of the Cluster Organisation of which the organisation is a member (if applicable):	
Contact details:	
VOP <sup>22</sup> :	

### Details of the Host Organisation

Name of the representative participating in the exchange:	
Name of the organisation:	
Name of the Cluster Organisation the organisation is a member of (if applicable):	
Contact details:	
HOP <sup>23</sup> :	

### Summary of the proposed exchange

Type of the exchange:	<input type="checkbox"/> Capacity building <input type="checkbox"/> Market research <input type="checkbox"/> Research, development and innovation <input type="checkbox"/> Networking and Events <input type="checkbox"/> Mentoring <input type="checkbox"/> Other: Click or tap here to enter text.
Duration of the exchange (in working days):	
Planned start date:	

<sup>22</sup> European Strategic Cluster Partnership for Excellence in charge of the Visiting Organisation

<sup>23</sup> European Strategic Cluster Partnership for Excellence in charge of the Host Organisation

Planned end date:

### Objectives

Please outline the overall and specific objectives for the exchange (including the individual objectives of the participants) and the related indicators. Please be as specific as possible.

### Action plan

Please outline the detailed action plan (implementation steps) of the exchange. The action plan should detail the tasks and responsibilities of each of the participants. Please also identify actions in the post-exchange period where relevant (mid- and long-term).

### Expected outcomes

Please identify the tangible and intangible expected outcomes of the exchange (e.g. skill development in specific areas, collaboration agreements, new business contacts, etc.) for each of the participants. Please be as specific as possible and refer to the indicators listed under “objectives”.

### Commitment by the parties

By signing this document, the Visiting Organisation, Host Organisation and their Partnership confirm that they will abide by the principles of the commitments below.

### The Visiting Organisation agrees to:

- Comply with the rules and regulations the Host Organisation is subject to.
- Respect the Host Organisation’s rules (house rules, code of conduct, confidentiality rules, etc.).

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- Comply with all arrangements set for the stay in order to achieve the stated objectives. In particular, execute the agreed activity plan within the set timeframe.
- Keep the Host Organisation and the Partnership informed of any circumstances that may affect the implementation of the exchange.
- Seek solutions for any problems/conflicts, jointly with the Host Organisation.
- Submit a report in the specified format within 7 days after the completion of the exchange.
- Be available to provide information on the exchange for the collection of success stories by the Partnership.
- Keep the content of this Commitment to Quality confidential.

**The Host Organisation agrees to:**

- Provide full information about the rules and regulations to which the Visiting Organisation has to comply during the visit.
- Comply with all arrangements set for the visit in order to achieve the stated objectives. In particular, execute the agreed activity plan within the set timeframe and related tasks/responsibilities within the set timeframe.
- Ensure that appropriate equipment, tools, support and facilities are available for the exchange.
- Provide local assistance to the Visiting Organisation during the exchange.
- Keep the Visiting Organisation and the Partnership informed of any circumstances that may affect the implementation of the exchange.
- Seek solutions for any problems/conflicts, jointly with the Visiting Organisation.
- Submit a report in the specified format within 7 days after the completion of the exchange.
- Be available to provide information on the exchange for the collection of success stories by the Partnership.
- Keep the content of this Commitment to Quality confidential.

**The Partnership of the Visiting Organisation agrees to:**

- Provide the Visiting Organisation with an information kit including relevant ClusterXchange scheme and financial rules and procedures, practical information related to the stay, as well as any relevant market information related to the host country/region.
- Be available to answer the questions of the Visiting Organisation concerning the exchange.
- Support the Visiting Organisation if any problems arise during the exchange implementation.
- Monitor the progress of the implementation of the exchange.
- Keep the content of this Commitment to Quality confidential.

**The Partnership of the Host Organisation agrees to:**

- Keep the Host Organisation informed about the ClusterXchange rules and procedures.
- Be available to answer the questions of the Host Organisation concerning the exchange.

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- Support the Host Organisation if any problems arise during the exchange implementation.
- Monitor the progress of the implementation of the exchange.
- Keep the content of this Commitment to Quality confidential.

**The Visiting Organisation:**

I agree with the exchange and applicable commitments in this document.

Name and Signature of the authorised representative(s) of the VO, Date:

**The Host Organisation:**

I agree with the exchange and applicable commitments in this document.

Name and Signature of the authorised representative(s) of the HO, Date:

**The Partnership of the Visiting Organisation:**

I agree with the exchange and applicable commitments in this document.

Name and Signature of the authorised representative(s) of the VO's Partnership, Date:

**The Partnership of the Host Organisation:**

I agree with the exchange and applicable commitments in this document.

Name and Signature of the authorised representative(s) of the HO's Partnership, Date:

## Annex 5 – Template of the Financial Agreement

This is an agreement between:

the Visiting Organisation's European Strategic Cluster Partnership for Excellence:

Partnership name:

Name and organisation of the authorised representative:

Organisation's address:

Phone:

Email:

as first party, hereinafter referred to as "VOP",

AND

the Visiting Organisation:

Name:

Address:

Phone:

Email:

as second party, hereinafter referred to as "VO".

### **Context**

The European Strategic Cluster Partnerships for Excellence (Partnership) are supported by funding from the COSME programme to facilitate cross-cluster networking and learning aiming at the professionalisation of specialised and customised business support services to small and medium-sized enterprises (SMEs).

ClusterXchange, implemented by the Partnership, is a new pilot scheme to support short-term exchanges to facilitate transnational cooperation, peer learning, networking and innovation uptake between actors of different industrial clusters in Europe.

The purpose of this agreement is to set the conditions for the provision of financial assistance by the VOP to the VO to cover some of the expenses of its participation in an exchange within the framework of the ClusterXchange at the Host Organisation (HO) (include here the name and address of the Host Organisation).

The VOP and the VO agree on the following terms and conditions for the provision of the financial assistance.

### **Article 1 – Duration and place**

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- 1.1 This agreement shall enter into force on the date when the last of the two parties signs it.<sup>24</sup>
- 1.2 The dates of the exchange, excluding travel time, will be from [...] to [...]. The exchange will have a total duration of [...] working days. The working day must be in line with the usual practices of the HO.
- 1.3 The exchange will take place in [city, country]
- 1.4 The exchange must be completed within the eligibility period of the VOP's grant agreement concluded with the Executive Agency for Small and Medium-sized Enterprises (EASME) in the framework of the European Cluster Excellence programme.
- 1.5 The VO is obliged to inform without any delay the VOP in case of events or developments that might have any impact on the exchange.

### Article 2 – Financial assistance

- 2.1. The VOP undertakes to pay to the VO the financial assistance as a lump sum of € [...] in one payment within 10 days after the completion of the exchange upon the submission of the relevant closing report of the exchange by the VO and its respective validation by the VOP, and the receipt of relevant evidence from the VO that the exchange has taken place (e.g. boarding passes, travel and accommodation invoices).
- 2.2. The financial assistance corresponds to (please choose from the following options and delete the instructions) [100% OR 75% of the full OR half] of the available total lump sum defined for the HO country and was calculated based on the following criteria: duration of the exchange (please choose from the following options and delete the instructions) [>5 working days OR ≤5 working days] and the distance between the VO and HO (please choose from the following options and delete the instructions) [≥200 km OR <200 km]. Please replace the former criteria and justify, in case the financial assistance was calculated based on the VO's disability with special needs that require the payment of the full amount of the lump sum or if the VO is coming from or going to outermost regions of the European Union or overseas territories (in which case the full amount of the lump sum is applicable).
- 2.3. The financial assistance provided by the VOP to the VO shall cover some of the expenses of its participation in the exchange, such as elements of travel, accommodation and subsistence linked with travel and stay abroad.
- 2.4. No additional financial assistance other than the one defined under Article 2.1 is available under this financial agreement (e.g. including financial assistance for the case of accident or illness).
- 2.5. In case of early termination of the exchange (before the completion of the planned duration), the financial support shall be modified according to the provisions of Article 3.

### Article 3 – Early completion of the exchange

<sup>24</sup> It is recommended that the VOP signs last.

- 3.1. The VO shall stay the full duration of the exchange as indicated in Article 1.2.
- 3.2. Leaving the HO's location before the final date of the exchange shall be considered a breach of the ClusterXchange rules, and consequently of the present agreement. In such a case, the exchange shall be considered unsuccessful and no financial assistance shall be paid by the VOP to the VO. Any payment made by the VOP to the VO under this agreement in such a case shall be reimbursed by the VO to the VOP within 15 working days of receiving a request to do so.
- 3.3. Exceptions to considering an early completion as an unsuccessful exchange include the following circumstances:
  - 3.3.1. The VO has a prior agreement from the VOP to leave the HO's city/country before the completion of the full duration of the exchange.
  - 3.3.2. The VO and HO mutually agree that the exchange can be shorter than initially agreed. In such a case, a justification shall be provided to the VOP that the exchange was nevertheless successful. The justification shall clarify the reasons for the early termination of the exchange and identify why it was nevertheless a success. This justification shall be part of the closing reports of the exchange submitted by the VO and the HO. In such a case, the exchange is considered successful, even if it had a shorter duration than the minimum required by the ClusterXchange (three working days).
- 3.4. In the circumstances as described in Article 3.3, the VO is entitled to the financial assistance (full, if the actual exchange has the duration of five working days or longer; half, if the actual exchange has a shorter duration than five days working days).
- 3.5. The payment conditions in Article 3.4 do not apply to the cases in which the amount of the financial assistance was calculated based on disability with special needs that require the payment of the full amount, nor to the cases in which the VO is coming from or going to outermost regions of the European Union or overseas territories. In these circumstances, the financial assistance remains at the full amount.

#### **Article 4 – Failed exchange**

- 4.1. The exchange shall be regarded as failed in case either the VO or the HO did not fulfil the commitments agreed in the agreement signed for the exchange "Commitment to Quality".
- 4.2. In the case that the VO remains with the HO for the full duration of the exchange or only identifies issues with the exchange after some time of its completion, and not when they occurred, the exchange shall not be considered to have failed.
- 4.3. If the failure is caused by the HO and its non-completion of its obligations, the VO shall be entitled to a financial assistance for the exchange under this agreement corresponding to the actual length of the stay as stipulated in Article 3.4. The exceptions to this are the cases included in Article 3.5
- 4.4. If the exchange failed for reasons of force majeure or reasons outside the control of the VO and HO, the actual expenses incurred by the VO and supported by the corresponding invoices shall be reimbursed by the VOP as a financial assistance, up to the limit of the full lump sum amount.

4.5. When responsibility for the unsuccessful relationship cannot be attributed to either the VO or HO, then the decision on reimbursement to the VO will be taken by the European Commission and EASME.

#### **Article 5 – Liability**

- 5.1 The VOP cannot under any circumstances or for any reason whatsoever be held liable for damage or injury sustained to the property of the VO or the HO while the stay abroad is being carried out or as a consequence of the stay abroad.
- 5.2 The VO shall assume sole liability towards third parties, including liability for damage or injury of any kind sustained by them as a result of an infringement by the VO, or as a result of violation of a third party's rights by the VO while the stay abroad is being carried out, or as a consequence of the stay abroad. The VO shall discharge the VOP of all liability arising from any claim or action brought as a result of an infringement by the VO, or as a result of violation of a third party's rights.

#### **Article 6 – Conflict of interests**

- 6.1. The VO commits to undertake all the necessary measures to prevent any risk of conflict of interests which could affect the impartial and objective execution of the agreement. Such conflict of interests could arise, for instance, as a result of economic interest, political or national affinity, family or emotional reasons, or any other shared interest.
- 6.2. Any situation constituting or likely to lead to a conflict of interests during the execution of the agreement must be brought to the attention of the VOP, in writing, without delay. The VO shall commit to undertake whatever steps are necessary to rectify this situation at once.
- 6.3. The VOP reserves the right to check that the measures taken are appropriate and may demand that the VO take additional measures, if necessary, within a certain time.

#### **Article 7 – Confidentiality**

- 7.1. The VOP and VO undertake to preserve the confidentiality of any document, information or other material directly related to the subject of this agreement that is duly categorised as confidential. The parties shall remain bound by this obligation beyond the closing date of the exchange.

#### **Article 8 – Checks and audits**

- 8.1. The VO agrees that the VOP may carry out an audit of the use made of the financial assistance, either directly by its own staff or by any other outside body authorised to do so on its behalf. Such audits may be carried out throughout the period of implementation of the agreement until the financial assistance is paid and for a period of five years from the date of payment. Where appropriate, the audit findings may lead to reimbursement from the VO to the VOP.
- 8.2. The VO undertakes to allow the VOP staff the appropriate right of access to all the information, including information in electronic format, needed in order to conduct such audits.
- 8.3. The European Court of Auditors and the European Commission shall have the same rights as the VOP, notably right of access, as regards checks and audits.

#### **Article 9 – Bank account**

- 9.1 The payment of the financial assistance shall be made to the following bank account of VO:

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- Name of the bank account holder (VO's bank account):
- Name of the Bank:
- Address:
- Full account number (including bank codes):

BIC:

IBAN:

#### **Article 10 – Applicable law and competent jurisdiction**

- 10.1. The financial assistance is governed by the terms of this agreement, by the applicable Community rules and, on a subsidiary basis, by the law of the VOP's country.
- 10.2. The courts having jurisdiction for matters relating to the financial agreement shall be those of the country of VOP.

#### **Article 11 – Amendment**

- 11.1. Any amendment to this agreement must be the subject of a written supplementary agreement. No oral agreement may bind the parties to this effect.
- 11.2. Extension of the exchange may be allowed up to the maximum duration (one month) without an increase in the agreed financial assistance, if all actors are in agreement (VO, HO, VOP and the of the HO). A written Validation for such an extension must be obtained before the end of the exchange and a written amendment to this agreement must be signed accordingly.

#### **Done in two copies, one for each party**

Done at [Place], [Date]

Signature of the VOP's  
authorised representative

Done at [Place], [Date]

Signature of the VO's  
authorised representative