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Deliverable D3.1

EPIX ClusterXchange induction trainings

Deliverable Control Page			
Deliverable Title	EPIX ClusterXchange induction trainings		
Deliverable Number	D3.1		
WP number	WP3		
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Short Description	An online induction training for all project partners will be organised by SIC in the first 2 weeks from the project start to clarify all issues regarding the ClusterXchange functioning and provide them with all information on its rules and other important EU-related business subjects, such as the Internal Market, European law issues and support services including inter alia the Enterprise Europe Network and SOLVIT. Moreover, information sessions will be organized by SIC and ELCA for project partners (besides the Kick-off meeting), and by project partners for its cluster members (and other actors) interested in the exchange programme within the project's first two months.		
Contributors	-		
Type R = Report, DEC=Websites, videos etc. O = Other,	Other		
Language	English		
Version	Date	Authors	Description
V1	29.04.2022	IŁ., MK	Final version
Dissemination level	<input type="checkbox"/> CO (Confidential, only for members of the consortium and Commission Services) <input checked="" type="checkbox"/> PU (Public)		
Requested deadline (dd/mm/yyyy)	30/04/2022		



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D3.1 EPIX ClusterXchange induction trainings

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Premises

The EPIX ClusterXchange induction trainings are envisaged to provide the project partners, and subsequently, also target stakeholders (potential applicants) with all the relevant information about the new COSME ClusterXchange programme.

The main aim of these information sessions is to outline the main rules and principles of the ClusterXchange pilot scheme, including eligibility criteria and participation guidelines as well as the work of the Support Office and functioning and technical features of the online CxC IT Tool.

In the EPIX projects the following induction training activities are planned:

1. ClusterXchange info session besides the 1° Steering Committee meeting, at the Kick-off meeting coordinated by ELCA (*due to its experience in the other COSME project BRILLIANT, where ELCA coordinates the CxC activities*) and attended by all PPs;
2. CxC Induction online training for all project partners, coordinated by SIC with support of ELCA;
3. Local information sessions organised by EPIX partners for their members and networks.

1. CxC info session beside the 1° SC meeting – 10.02.2022

During the 1st project Steering Committee meeting organised by Coordinator LIV on 10.02.2022, ELCA chaired a short information session about the ClusterXchange mobility scheme, to be activated within the EPIX Work Package 3 *CONNECT*.

Partners have been familiarised with the CxC program's goals, tools and procedures as well as with the EPIX CxC targets and specific tasks to implement and promote this mobility scheme.

ELCA showed and explained to PPs where to find all the information and useful materials and guides on the ECCP platform and also created a specific CxC dedicated folder with all the relevant information and documentation in the EPIX shared dropbox repository.

After the session, all Partners have been asked to read the CxC manuals and explore the IT Tool in order to get familiar with all the rules, requirements and platform functionalities but also to identify problems, issues and questions that will be then discussed and answered during the dedicated EPIX CxC induction training scheduled for 17.03.2022.





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EXCELLENCE EPIX KOM & 1 SC meeting 10.02.2022

Meeting Agenda & objectives

- Get to know each other ☺
- Setting the legal framework (GA+CA) + management provisions
- Outlook of project activities (WPs+tasks) and defining the short-term work plan

Are You Ready?

Time	Topics	Speakers
10:00	Opening and Welcome Welcoming and introduction of the meeting agenda and objectives	RI LIV/ELCA
10:05 – 10:25	WP5 PROJECT MANAGEMENT - Legal framework: Grant Agreement & Consortium Agreement - Project reporting & payments - Management rules & roles	RI LIV & ELCA
10:25- 11:00	WP1 EMPOWER: cluster as smart cities champions T1.1 Cluster Excellence Benchmarking T1.2 Cluster as Smart Cities Champions: Upgrade Skills of Cluster Managers on Smart Cities T1.3 Know How for Connecting SMEs and Cluster Members with the Cities - WP's objective, tasks and responsible partners - Working schedule and deliverables: what, who, when	RI LIV/ELCA MoWIN.net
11:00- 11:25	WP2 ENABLE: cluster as smart cities business networks T2.1 Strategies for Interconnecting Clusters and Cities T2.2 Creating Business Networks for Smart Cities - WP's objective, tasks and responsible partners - Working schedule and deliverables: what, who, when	RI LIV/ELCA HABIC
11:25- 11:50	WP3 CONNECT: Clusters and smart cities for the EPIX ClusterXchange T3.1 ClusterXchange PREPARATION PHASE (3 months) T3.2 Registration, Assessment & Exchange Building T3.3 Ready to Start – Exchange Execution, Monitoring & Validation T3.4 Exchanges Follow-Up - WP's objective, tasks and responsible partners - Working schedule and deliverables: what, who, when	RI LIV/ELCA SIC
11:50	WP4 OUTREACH AND AWARENESS-RAISING ACTIVITIES	
12:15	T4.1 EPIX Outreach and Awareness-Raising Strategy T4.2 EPIX Outreach and Awareness-Raising Tools T4.3 EPIX Outreach and Awareness-Raising Events T4.4 EPIX Outreach and Awareness-Raising Report - WP's objective, tasks and responsible partners - Working schedule and deliverables: what, who, when	
12:15- 12:30	Next steps and closure of the meeting	RI LIV / ELCA

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EXCELLENCE WP1 Feb22 – Jan24 (M1-M24)

WP3 CONNECT: Clusters and smart cities for the EPIX ClusterXchange

WP1 MAIN GOALS:

- WP leader: SIC
- to implement the ClusterXchange professional programme and to boost and facilitate international, intra-regional, sectoral and cross-sectoral collaboration between EPIX clusters and their members, with a particular focus on SMEs, scaling-up organisations and city managers;

ClusterXchange is a new pilot scheme 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 member of a cluster within a similar or from different industrial ecosystems. It is implemented with the support of clusters that have teamed up in ESCP4x Partnerships → like EPIX project.

Exchanges can be used to:

- ✓ Learn from actors in another cluster;
- ✓ Explore growth opportunities in new markets;
- ✓ Take up new technologies, digitalisation and green low-carbon solutions;
- ✓ Invest in strategic interregional collaboration

An exchange can last from **3 working days** (excluding travel days) to **one month**. While eligible participants can host exchanges multiple times and even simultaneously, they can only visit organisations in the scheme once. The stay is partly financed by the European Commission – ESCP4x projects, through a lump sum paid to the Visitors for travel and accommodation expenses. The lump sum must not exceed the threshold defined per host country.

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EXCELLENCE WP1 Feb22 – Jan24 (M1-M24)

XCHANGE WP3 CONNECT: Clusters and smart cities for the EPIX ClusterXchange

Website

<https://clustercollaboration.eu/clusterxchange>

- Provides general information
- Frequently Ask Questions
- Eligibility, participation
- Contact details to get support
- Access to CXC IT tool

ClusterXchange

ClusterXchange is a new pilot scheme to support short-term exchanges to better connect Europe's industrial ecosystems. It facilitates cross-industrial cooperation, peer learning, networking and innovation across different industrial clusters. It is implemented with support from cluster organisations that have teamed up in the European Cluster Partnership (ECP).

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EXCELLENCE WP1 Feb22 – Jan24 (M1-M24)

XCHANGE WP3 CONNECT: Clusters and smart cities for the EPIX ClusterXchange

2) ClusterXchange

Fostering excellence capacity-building + facilitating strategic interregional collaboration + strengthening ties between industrial clusters' ecosystems across Europe

- ✓ Promotion of "ClusterXchange"
- ✓ Enrolment of participants (visiting and host organisations)
- ✓ Assessing applications from visiting and host organisations
- ✓ Building exchanges
- ✓ Management of grant agreements, commitments and financial assistance
- ✓ Preparation of the exchange
- ✓ Follow up of the exchange
- ✓ Management, quality control and evaluation
- ✓ Active outreach, networking and engagement
- ✓ Reporting

Expected number of 80 or more short-term exchanges per Partnership
! 50% of supported exchanges to involve SMEs !

% of exchanges involve participants not being part of a Partnership or not being a member of one of its partners !

Support Office will help the Partnerships running CXC

European Commission

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2. ClusterXchange induction training for project partners – 17.03.2022

A specific ClusterXchange induction training for EPIX Partners was organised by SIC and ELCA on 17.03.2022 via the Zoom platform.

These 2 hours workshop was fully dedicated to the ClusterXchange mobility scheme and learning on how it works, who it is addressed for and how to shall be implemented.

The banner features a blue background with a white geometric shape on the right side. On the left, it says 'EPIX 1° ClusterXchange info session for Partners' and '17.03.2022 10.00 - 12.00 CET Zoom meeting'. On the right, it says 'WP3 CONNECT: Clusters and smart cities for the EPIX ClusterXchange' and lists 'Marta Krakowiak, ELCA' and 'Irena Łobocka, SIC'. Logos for ClusterXchange and EPIX are present.

EPIX
1° ClusterXchange info session for Partners

17.03.2022 10.00 - 12.00 CET
Zoom meeting

WP3 CONNECT:
Clusters and smart cities for the EPIX ClusterXchange

Marta Krakowiak, ELCA
Irena Łobocka, SIC

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The training was divided in 4 sessions covering respectively the following topics:

- ✓ The ClusterXchange scheme, its main rules, management provisions, participants, financial support and procedures;
- ✓ CxC IT Tool: functionalities incl. registration of Vo and Ho profiles, matching, preparation of exchange, related documentation (Commitment to Quality + Financial Agreement), validation of exchange, execution and reporting + including online “journey” through the IT Tool and showcasing of its functions incl. creation of a profile and matching portal;
- ✓ CxC scheme in the EPIX project: main focus, eligible participants, target indicators;
- ✓ CxC good practices from the BRILLIANT project.





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D3.1 EPIX ClusterXchange induction trainings

About ClusterXchange

ClusterXchange is a new pilot scheme to support short-term exchanges to better connect Europe's industrial ecosystems.

It facilitates 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 Cluster Partnerships | Excellence projects → like EPIX.

Exchanges can be used to:

- ✓ Learn from actors in another cluster;
- ✓ Explore growth opportunities in new markets;
- ✓ Take up new technologies, digitalisation and green low-carbon solutions;
- ✓ Invest in strategic interregional collaboration;
- ✓ Other.

<https://clustercollaboration.eu/clusterxchange>

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ClusterXchange specifics

- **Contribution Funding:** lump sums available for visitors for travel and accommodation expenses
- **Period of stay:** exchanges can last from three working days up to one month
- **How to apply:** Through the ClusterXchange IT Tool, hosted on the ECCP Platform and supported by specific Partnerships

What is an exchange?

An exchange in ClusterXchange constitutes a stay abroad by a visiting organisation (visitor) at a host organisation (host) to explore collaboration and growth opportunities.

An exchange can be **minimum 3 working days** and maximum one month executed consecutively, excluding travel time.

All steps that relate to the participation in exchanges (registration, matching, exchange building and exchange finalisation) are managed via the **ClusterXchange IT Tool**.

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Who can participate in ClusterXchange?

You can participate as a VISITOR or HOST if you are representatives of:

- a. Cluster organisations and business network organisations** (project partners and/or organisations external to EPIX Consortium)
- b. Scaling-up support organisations** (i.e. tech centres, research institutes, DIHs, fab labs, resource-efficiency service providers, incubators, accelerators) that are cluster members
- c. Small and medium-sized enterprises (SMEs)** that are cluster members
- d. Training providers** from a COSME participating country that are cluster members,
- e. Large companies** from a COSME participating country that are cluster members,
- f. Public authorities** at both regional and city levels that are active in a cluster from a COSME participating country

All participants must be from countries participating in the COSME programme. These countries include all European Union Member States and other third countries, as listed at: <https://ec.europa.eu/docsroom/documents/3937/>.

To participate, the representatives of eligible organisations must:

- ✓ Be minimum 18 years old
- ✓ Be a national of a participating country or must have spent at least 183 days in a participating country with a residence permit or equivalent document, in case of non-nationals
- ✓ Have the official capacity to represent an eligible organisation in the EU or any other participating country

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CXC benefits

Benefits for VISITING Organisations

A visitor is the travelling party of the exchange, allowing her/him to visit a foreign cluster members active in business areas relevant to his/her organisation.

Main benefits:

- ✓ Broaden your sector- and non-sector specific skills and knowledge through capacity building
- ✓ Gain insights into the operation and techniques used by the host organisation
- ✓ Expand your network of contacts and develop new cross-border partnerships
- ✓ Find innovative solutions to upgrade your business, products and services
- ✓ Create new business opportunities and get involved in new innovative projects
- ✓ Gain knowledge on foreign markets and cultures
- ✓ Benefit from financial assistance for your exchange – lump sum reimbursement of travel & accommodation costs

Benefits for HOSTING Organisations:

A host is the non-travelling party of the exchange. Hosting exchanges will allow to receive short visits of foreign cluster members that are active in business areas relevant to host organisation.

Main benefits:

- ✓ Increase the visibility of your organisation, services and products in relevant communities (this exposure can be increased if you host multiple exchanges)
- ✓ Share your knowledge, experience and information in specific areas
- ✓ Learn new skills and knowledge from your visitors
- ✓ Expand your network of contacts and develop new cross-border partnerships
- ✓ Gain knowledge on visitors' foreign markets and develop business and collaborations with them

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How to be a host or a visitor?

A set of guidelines and support tools are made available for visitors and hosts, by the Support Office to facilitate the registration and all the CxC management phases.

All the support materials are available on the **ClusterXchange Repository** (accessible only upon registration to the ECCP platform) <https://clusterxchange.clustercollaboration.eu/admin/repository>

EPIX Partners, in particular SIC and ELCA, shall support all CxC applicants in the CxC procedures.

Each Partnership is responsible for developing its own **information kit and guidelines to be provided to visitors** (i.e. format and content) once an exchange has been approved by all parties (i.e. the Commitment to Quality has been signed).

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The ClusterXchange portal

The ClusterXchange online portal is housed in the **European Cluster Collaboration Platform (ECCP) website**.

The ClusterXchange portal provides you with access to detailed information on ClusterXchange such as the eligibility criteria, information on the **registration, matching, exchange building and finalisation processes**, financial assistance stipulations for the visiting organisations, background information on the Partnerships and the ClusterXchange Support Office and importantly, access to the **IT Tool** where you can apply to the scheme.

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CXC Commitment to Quality & Financial Agreement

An exchange that is endorsed by two participants (Visitor + Host) should then lead to a Commitment phase. At this stage, all parties involved shall agree on an official **Commitment to Quality** text, and establish the objective(s) of the exchange, the activity plan, the responsibilities, the expected outcomes, the duration of the stay and the planned start and end dates, etc.

The **Commitment to Quality will act as the official agreement between the visitor and the host**, and it must be signed by all parties involved: Visitor(s), Host, Partnership of the Visiting Organisation - VOP (i.e. EPIX Coordinator), Partnership of the Host Organisation - HOP (i.e. EPIX Coordinator)

Agreement for Financial Support to the visitor set the rules, obligations of the financial assistance to the visiting organisation, and reimbursement procedures of the allocated lump sum. Financial Agreement must be signed by the visiting organisation and concerned Partnership (i.e. EPIX Coordinator + Partner financially responsible for the exchange)

Both documents shall be generated through the IT Tool, downloaded, signed digitally or in handwriting (in blue ink) by all parties, and re-uploaded on the IT Tool – for the CxC Support Office official validation
→ At least 7 days before the CxC exchange official start

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1. Details of the Visiting Organisation

Name of the representative participating in the group exchange:	KXN YYYYY CCCC VVVVVV BBBB ANNNNN
Name of the organisation:	SME 1, SME 2, SME 3, SME4, SME5...
Name of the Cluster:	Rede de Impresa Lusa in Veneto, Italy
Organisation of which the organisation is a member (if applicable):	Impresaria Open Innovation Cluster for Construction Industry (MIENK Cluster)
Contact details:	
VOP:	BRILLIANT Boosting excellence in the European lighting value chain

2. Details of the Host Organisation

Name of the representative participating in the exchange:	Angela Labella
Name of the organisation:	CCAT Lighting cluster
Name of the Cluster:	CCAT Lighting cluster
Organisation the organisation is a member of (if applicable):	

part in the thematic round tables' discussion and networking.

Thu 18.11.2021	9:00 - 12:30	Participation in the Tomorrow City and PUZZLE 8 events and showcasing focused on solutions for smart cities (like energy-saving street lights, smart lampposts for WiFi and EV charging, smart buildings) at the Smart City Expo Fair World Congress - events organised at the Smart City Expo Fair in Eira Barcelona
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Strengthening the European economy through collaboration

Financial support to Visitors - lump sum 1/2

A lump sum is defined as a global amount deemed to contribute to cover Visitor's expenses, such as travel, accommodation and subsistence linked with travel and stay abroad. This amount is paid without any formal justification of costs incurred (i.e. visitors do not have to provide financial reports or proofs for their expenses to the Programme).

→ However, Partnerships must gather sufficient evidence that the exchange has taken place abroad (e.g. collecting supporting documents like hotel invoice, rent contract, boarding passes, confirmation from hosts, photos of executed activities, etc.).

The CxC IT Tool also calculates the corresponding amount of the lump sum per exchange. Lump sums per country are defined in CxC Quality Manual (Annex 1), and shall be 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.

Visitors with disabilities and visitors coming from or going to EU outermost regions or overseas territories benefit from the maximum monthly allowance to compensate for the extra costs linked to their specific situation.

Agreed lump sums shall transferred to the Visitor organisation in one payment within 10 working days following the reception and validation of relevant closing report in the CxC IT Tool, and other evidence supporting documents that the exchange has taken place.

Financial support to Visitors - lump sum 2/2

The amount of financial support per third party (visiting organisation) must not exceed EUR 1100.

Visiting organisations can only participate once per cycle (i.e. once under each call for proposals of the European Cluster Excellence Programme) as a **visiting organisation**.

An organisation can participate as a **host organisation (HO)** in multiple exchanges, receiving as many visits as it wish to host.

Only a manager of an organisation or a person directly involved in the organisation processes should apply to the CxC scheme as a visitor and host organisations. Only one person for organisation can apply.

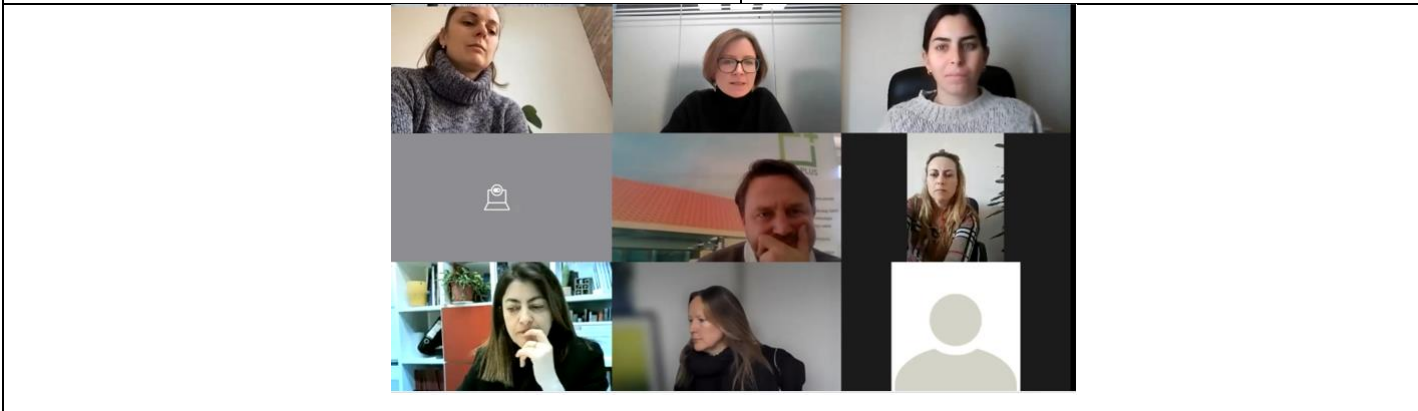
Country of May/Host country	Amount per month (€)
Austria	1100
Belgium	1100
Denmark	1100
France	1100
Germany	1100
Greece	1100
Italy	1100
Japan	1100
Spain	1100
Sweden	1100
Switzerland	1100
UK	1100
USA	1100
Other countries	1100

CxC exchanges in EPIX / project partner

n° 80 exchanges to be executed in EPIX = 13-14 visitors / partner

Partner	Country of the Host country**	Estimated AVERAGE amount per visit	Estimated number of visits	Total in EUR
Partner 1 - Confindere EIT21	COESG	137,14	14	12.000
Partner 2-ELIA	COESG	137,14	11	12.000
Partner 3-FC	COESG	137,14	11	12.000
Partner 4-IBAC	COESG	137,14	11	12.000
Partner 5 - IZ KECHEMART (unselected)	COESG	0	0	0
Partner 6-IMW srl	COESG	137,14	14	12.000
Partner 7-CTEBO	COESG	137,14	11	12.000
Total for coventoria			60	12.000 EUR

Thank you for your attention!
Any questions?





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D3.1 EPIX ClusterXchange induction trainings

3. Local information sessions

Each project partner will organise the first set of the local ClusterXchange information sessions addressed to its own cluster members and other local actors interested in the exchange programme, in the period between May and June 2022.

The local info sessions will be organised in the form of an online seminar or a physical meeting. The agenda and materials used for the info session will be prior consulted with the PP3 SIC and PP1 ELCA, to ensure that the right information is given to the potential applicants.

6 local CxC info sessions are envisaged:

- ✓ 1 local session by RI LIV – planned for 12.05.2022
- ✓ 1 local session by Dutireg – planned for 04.05.2022
- ✓ 1 local session by Habic – planned for mid of May 2022
- ✓ 1 local session by MoWin.net – planned for the end of May 2022
- ✓ 1 local session by SIC – planned for the mid of May 2022
- ✓ 1 “international” session by ELCA – planned on 30.06.2022 for its cluster-members (from Spain, Poland, Belgium and France).

