ClusterXchange IT Tool User Manual

22 December 2021

An initiative of the European

Contents

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Abbreviations

CXC	ClusterXchange
CXC IT Tool	Information Technology Tool used for the administrative management of the ClusterXchange
EISMEA	European Innovation Council and Small and Medium-sized Enterprises Executive Agency
EC	European Commission
ECCP	European Cluster Collaboration Platform
HO	Host Organisation
HOP	Partnership in charge of the HO
Partnerships	European Cluster Partnerships | Excellence
Partnership EM	Partnership Exchange Manager
CXC SO/SO	ClusterXchange Support Office
User	Profile holder on the IT Tool
VO	Visiting Organisation
VOP	Partnership in charge of the VO

Note

This document is the user manual for the ClusterXchange scheme (CXC) developed within the European Cluster Collaboration Platform (ECCP) project. It consists of the following components:

- D2.18c: IT Tool manual for participants (host and visiting organisations)
- D2.18d: Registration guide for host organisations
- D2.18e: Registration guide for visiting organisations

In order to maintain simplicity and user-friendliness, these components have been merged into one single manual, the ClusterXchange IT Tool User Manual (D2.18ced). The manual includes guidelines on how to use the CXC IT Tool from a user/participant's perspective.

01

Introduction

1. Introduction

Launched in 2020, the 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 Cluster Partnerships | Excellence and referred to as Partnerships. The Partnerships are supported by funding from the COSME programme of the European Union (EU)[1].

CXC is currently implemented by 13 Partnerships, 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 during registration, matching and participation in CXC.

The overall action shall foster SME competitiveness and assist companies to successfully access global markets. 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 finalisation). The guidelines and instructions provided in this manual are meant to develop a clearer perspective regarding the IT Tool and other technical specificities of the involved processes in general. This document is accessible from the CXC web portal on the ECCP website[2].

1.2. Structure and Methodology

The document has been structured into the following chapters:

[1] Competitiveness of Enterprises and Small and Medium-sized Enterprises (COSME) is the EU programme 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: https://ec.europa.eu/growth/smes/cosme_en
[2] CXC webportal on the ECCP website: https://clustercollaboration.eu/clusterxchange

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

After an introduction in Chapter 1, Chapter 2 explains the CXC, the CXC IT Tool and the CXC Support Office (SO) in general. The following chapter (3), discusses the registration related specifications for the HO and the VO, separately. It is relevant to note that this chapter has three subchapters correlating to different guides for registering o CXC IT Tool. The three subchapters 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 linked to the IT Tool and are made accessible to other participants for matching and exchanges, when applicable.

Chapter 4 is relevant for both HOs and VOs and discusses the matching process and exchange building and finalisation 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 finalisation.

1.3. IT Tool Tutorials for users

Complementary to this manual, short guides in the form of tutorial videos, diagrams, GIFs and instructions on 'How to use the CXC IT Tool' can be found on the CXC portal, under the CXC FAQs page: https://clustercollaboration.eu/clusterxchange/faqs. The tutorials showcase how CXC IT Tool Users (HO or VO) can conduct all the CXC related activities on the IT Tool. The available tutorials are as follows:

- How can I login and create a profile on the CXC IT Tool?
- How can I delete my organisation´s profile on the CXC IT Tool?
- How do I perform and manage matches on the CXC IT Tool?
- How do I initiate a match on the CXC IT Tool?
- How do I reject or cancel a previous match and search for a new match on the CXC IT Tool?
- How can I validate a match on the CXC IT Tool?
- What is exchange building?
- How can I create a Commitment to Quality on the CXC IT Tool?
- How can I create an exchange group and add new VOs to the group?
- How can I prepare the Financial Agreement on the CXC IT Tool?
- What is exchange finalisation?
- How can I prepare the Final Activity Report on the CXC IT Tool?
- How can I prepare the Final Activity Report on the CXC IT Tool for a grouped exchange as the Host Organisation (HO)?

02

General 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 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 exchange should be done in consecutive working days, meeting normal/required working hours of the HO's country.

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:

- A cluster or similar business network organisations[3];
- A scaling-up support organisation (technology centre, research institute, fab-lab, resource-efficiency service provider, [digital] innovation hub, creative hub, incubator and accelerator) that is a cluster member; or
- A small and medium-sized enterprise (SME) that is a cluster member.

Eligible participants must have their permanent residence (i.e., the place where the organisation is registered) in a country participating in the COSME programme of the EU. More details on eligibility are in Chapter 3.

The activities to be implemented during the exchange may include:

- Individual or grouped capacity building;
- Sharing of knowledge, experience and information in specific areas;
- Project development, innovation and research and development;
- Market research;
- Branding, sales and marketing of cluster or company;
- Networking, identification of new partners and creation of new business opportunities.

[3] 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".

Registration, matching, exchange building, and exchange finalisation are regarded as the four 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 to as IT Tool) aims to facilitate the exchanges from an administrative perspective. The IT Tool is part of the CXC web 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 finalisation.

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 on the upper right corner of the page. Click on 'Create new account' (Figure 1). Once you have logged into the ECCP website, the same login can then be used to access the IT Tool.

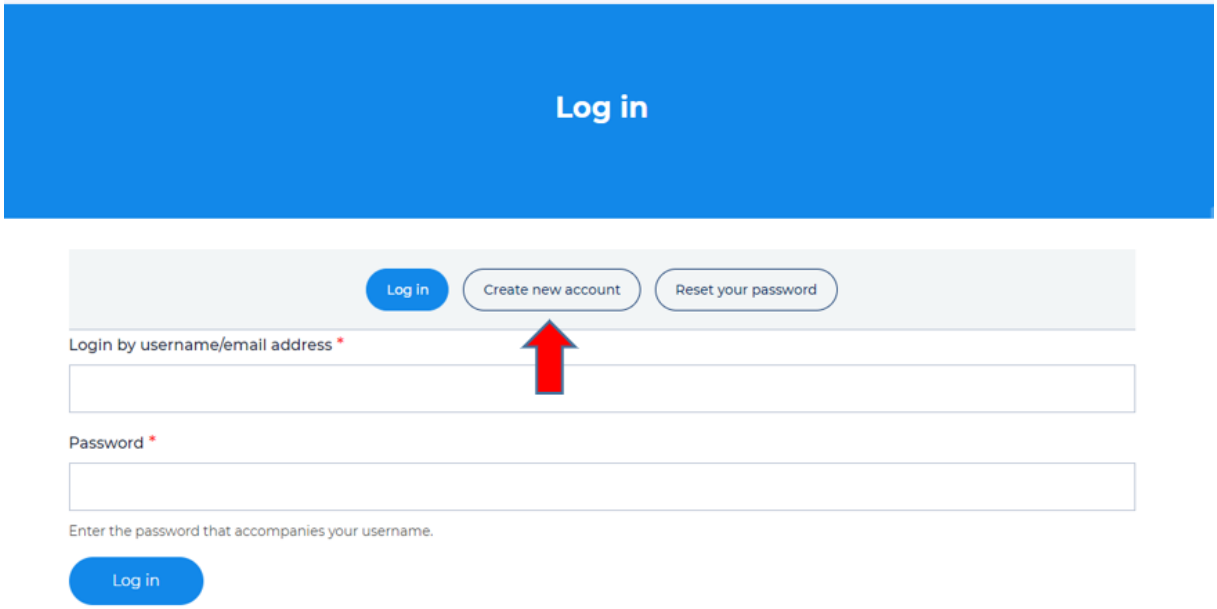

Figure 1: ECCP portal login

Location of the IT Tool on the ECCP website

The CXC is located on the CXC web portal. To find the CXC web portal, a user can insert the address https://clustercollaboration.eu/clusterxchange on a browser to reach the ECCP and then scroll down to find the tile for the CXC IT Tool. Another option is to scroll to 'Our Services' section on the ECCP Home page[4] and click on the tab for ClusterXchange which will direct the user to the CXC web portal where the tile for the CXC IT Tool can be seen (Figure 2).

[4] ECCP website Home page: https://clustercollaboration.eu/

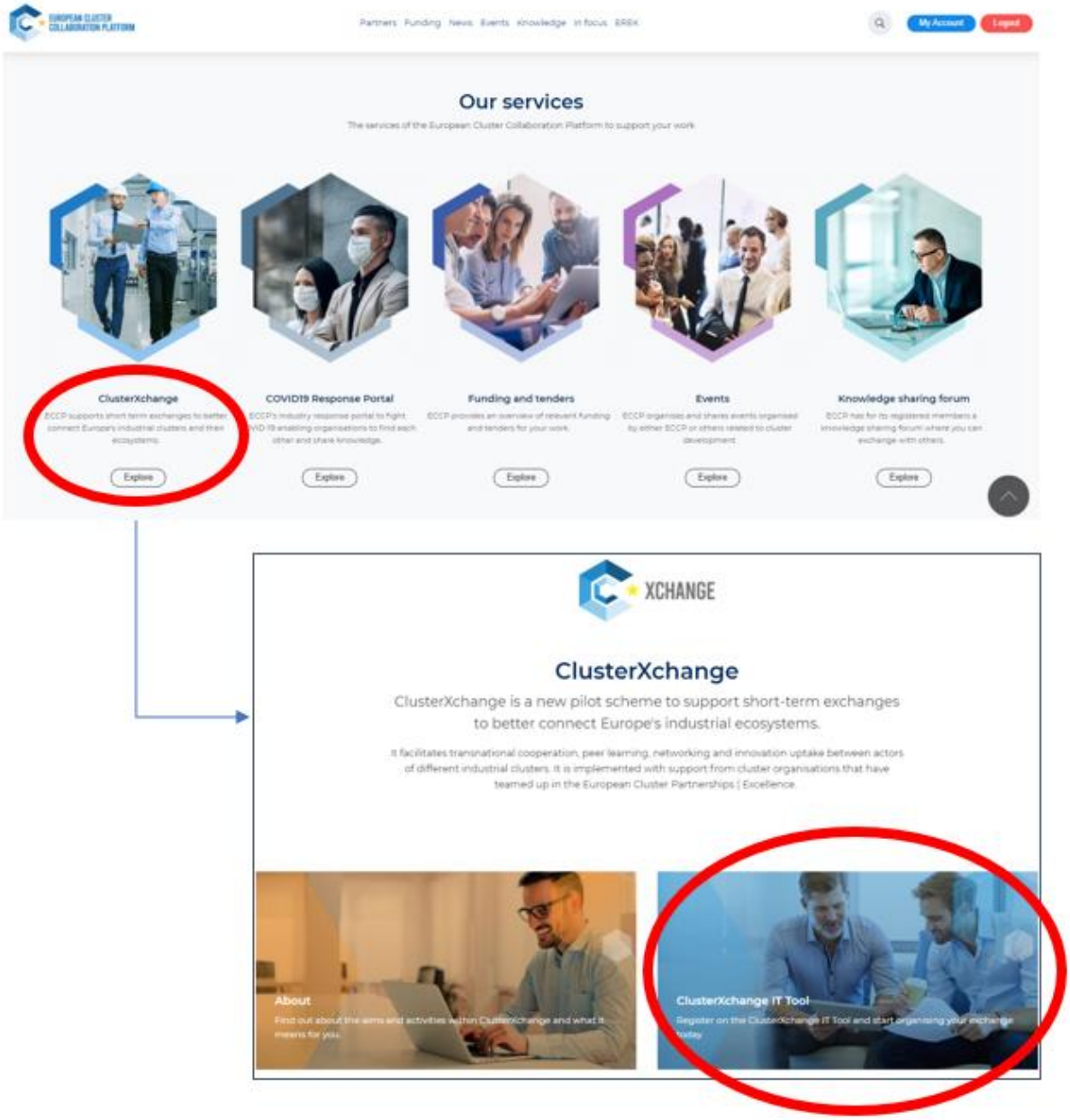

Figure 2: Location of IT Tool on ECCP website

Dashboard

After clicking on the tile for the CXC IT TOOL (Figure 2), 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 3). The user can create two types of profiles – HO and VO (more information on profile creation is included in Chapter 3). A user can create HO and VO profiles for different organisations using the same ECCP account. However, only one HO and one VO profile for an organisation can be published. HO and VO profiles on the dashboard can be easily distinguished by their labels.

Figure 3: 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 4).

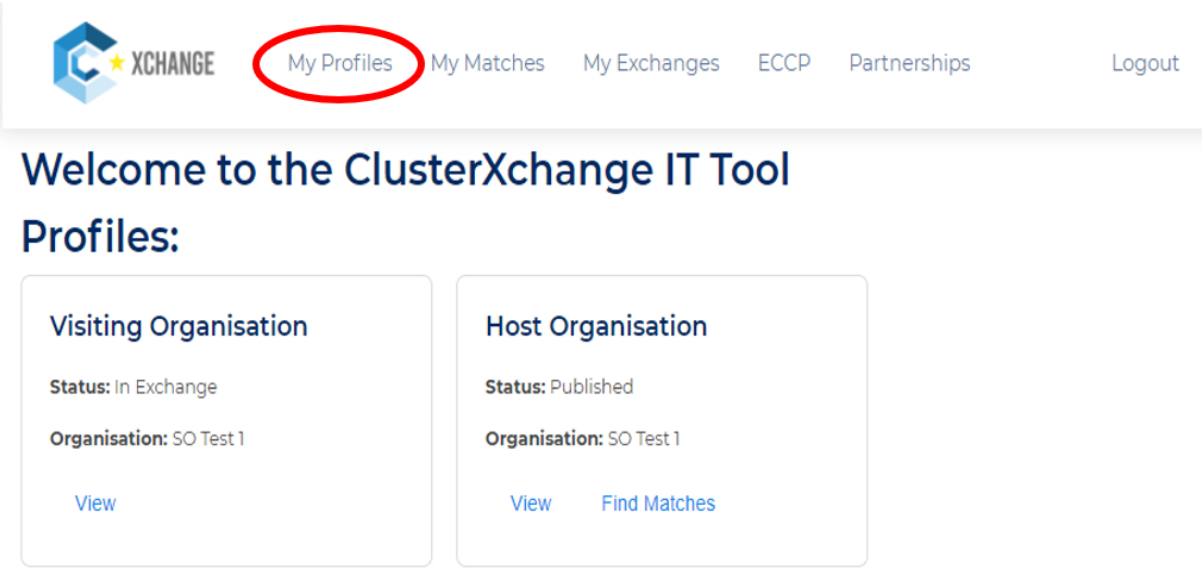

Figure 4: My Profiles menu

- 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 5).

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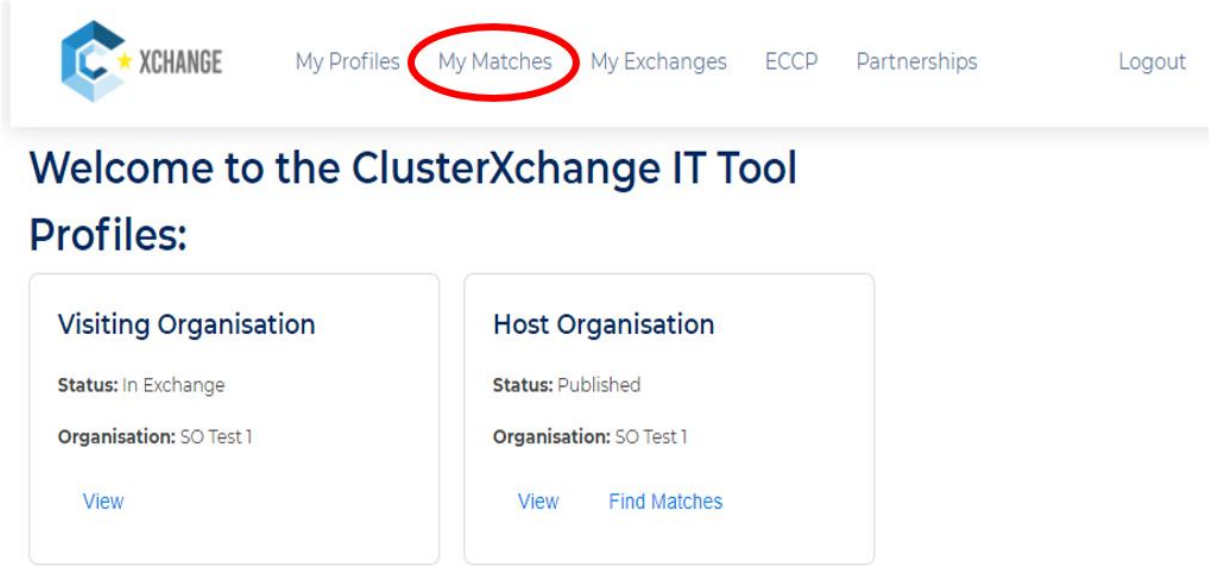

Figure 5: My Matches menu

- My Exchanges: This menu enables the users to view exchanges associated with the profiles that the user created. (Figure 6).

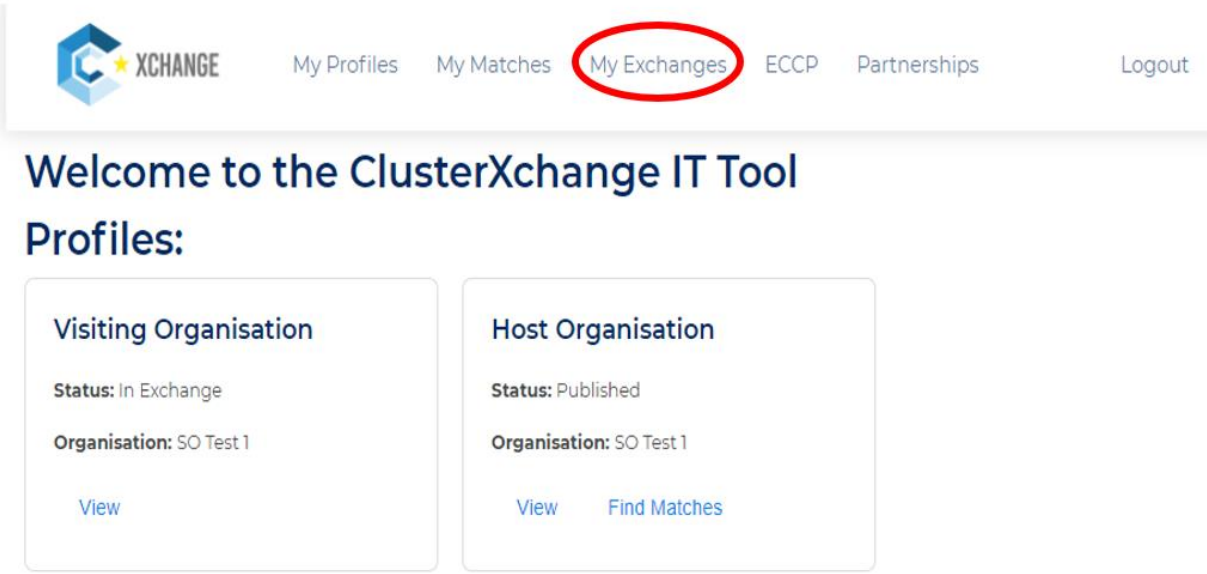

Figure 6: My Exchanges menu

The footer (Figure 7) 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[5].

[5] The CXC Repository visible on Figure 7 is only available to participants (HOs or VOs) who are also administrators on the IT Tool. This repository houses documents for use by the Partnerships only. For participant that are not administrators on the IT Tool, the option to access the CXC Repository on the footer of the IT Tool will not be available.

Figure 7: 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[6] as no Partnership contact point is yet assigned.

In the participation phase (matching, exchange building and finalisation) 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 19). 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 (see Figure 51). 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 finalisation**, once an exchange is created, an Exchange Forum is made available for communication within each individual exchange web section (See Chapter 4.2: Exchange building). 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 CXC 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 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 (coordinator) for each participant will be accessible through the IT Tool after the user profile has been published. Each contact point for the Excellence Partnerships can also be found on a dedicated page on the ECCP website for each Partnership (https://clustercollaboration.eu/eu-cluster-partnerships/escp-4x). The SO has various responsibilities within the framework of ECCP tailored to address the needs of the

[6] Phone queries: +351 22 607 64 07; Written queries (in English): clusterxchange@clustercollaboration.eu; Open 10:00-14:00 (CET) Monday to Friday on working hours

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 8.

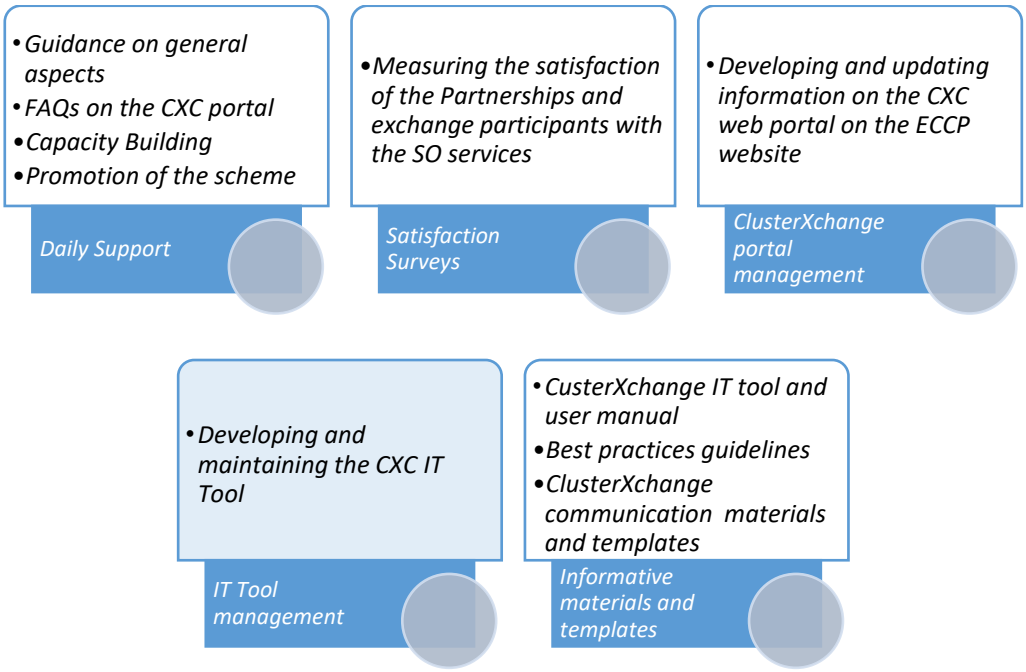

Figure 8: SO's overall services

ClusterXchange Support Office contact

Phone queries: +351 22 607 64 07

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

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

03

Registration guides for Host Organisations (HO) and Visiting Organisations (VO)

XCHANGE

Strengthening the European economy through collaboration

3. Registration guides for Host Organisations (HO) and Visiting Organisations (VO)

3.1 Registration guides for Host Organisations (HO)

3.1.1 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 European Innovation Council and Small and Medium-sized Enterprises Executive Agency (EISMEA) 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 on 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:

- Cluster organisations[7] and similar business network organisations[8] 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 in Figure 9.

[7] '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".
[8] See footnote 1 on page 9

The European Union's SME definition

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

- Enterprise category: Small or medium-sized
- Head count: < 250
- Turnover: ≤ € 50 million Or Balance sheet total of ≤ € 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 can be found at:
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 9: 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[9], research institutes, fab labs, [digital] innovation hubs[10], creative hubs, resource-efficiency service providers[11], 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[12].

[9] 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 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

[10] 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

[11] https://www.resourceefficient.eu/en/support-organisations

[12] It must be noted that large companies, public authorities, innovation agencies, universities and other types of entities different from the above listed organisation types are not considered eligible. In exceptional circumstances, organisations under the last two bullet points that are not members of cluster organisations profiled on ECCP can take the role of the HO (but not the role of the VO). This will be accepted following a case-by-case assessment and pre-approval of the European Innovation Council and Small and Medium-sized Enterprises Executive Agency (EIASMEA).

Note: Participants profiling 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 (Figure 14).

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 when registering on the IT Tool.

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.

<u>Third country nationals</u>

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 3.1.2 and 3.1.3 discuss in detail the process of profile creation, submission, and validation. **Error! Reference source not found.** presents a scheme to simplify and graphically explain these processes.

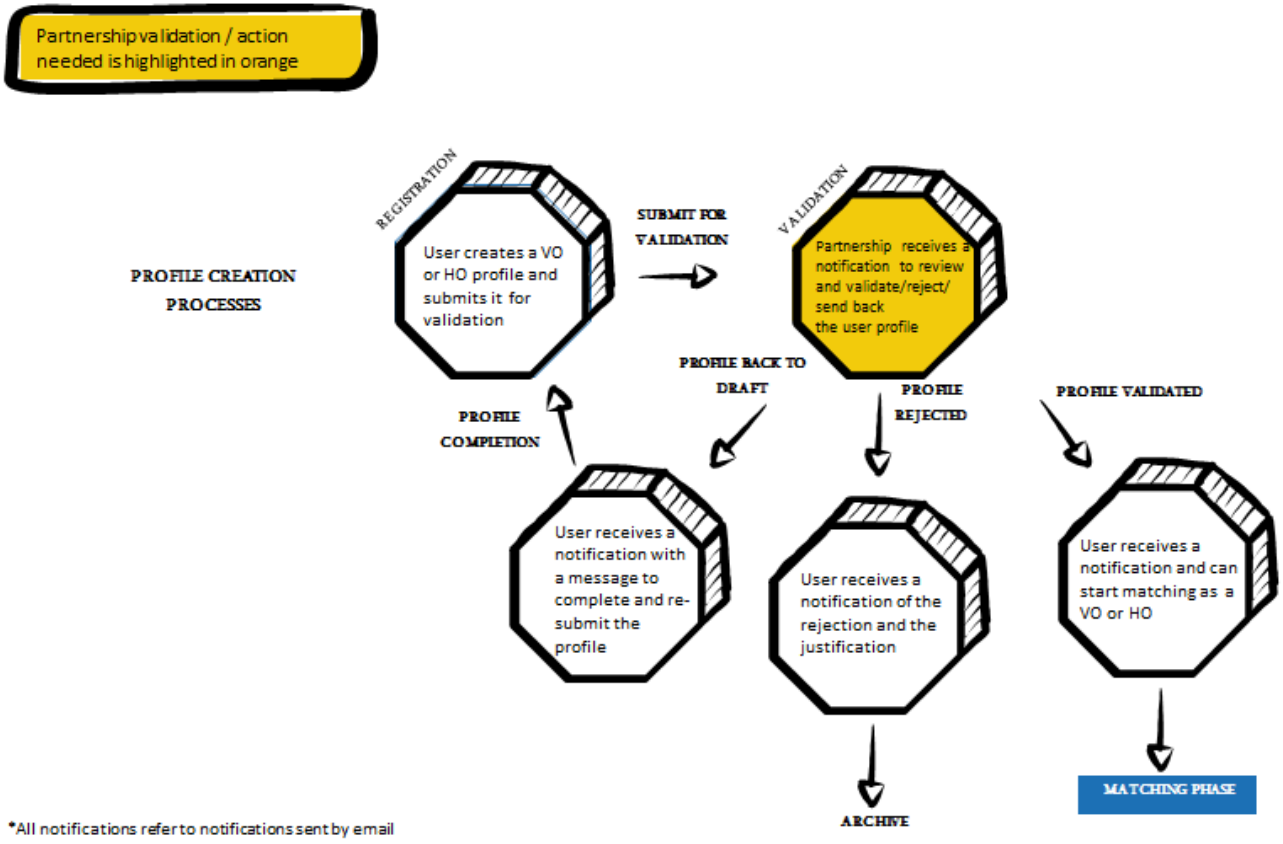

Figure 10: Overview of the processes involved for the registration of an HO

3.1.2 STEP 2 – My profile

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

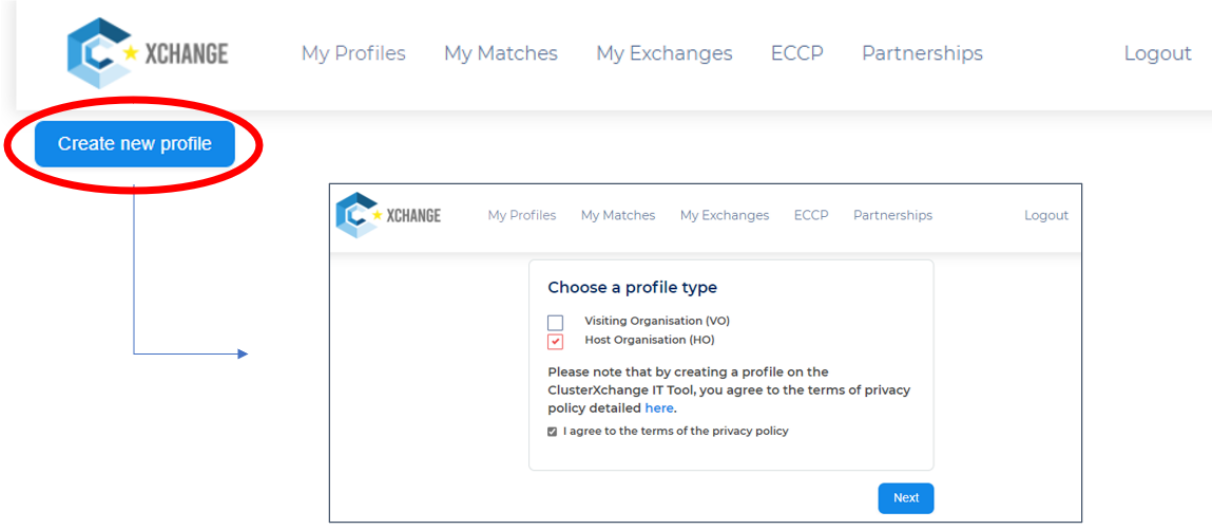

Figure 11: Create a new profile and choose a profile type (HO)

Personal Information

As can be seen in Figure 12, the fields on Page 1 of profile creation include personal 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 in a PDF format. There is an option towards the end of the page to tick "mark" if the user has a disability/ies with space for a short explanation. At the end of the form filling, the user must crosscheck the information provided and complete the cells marked in Red.

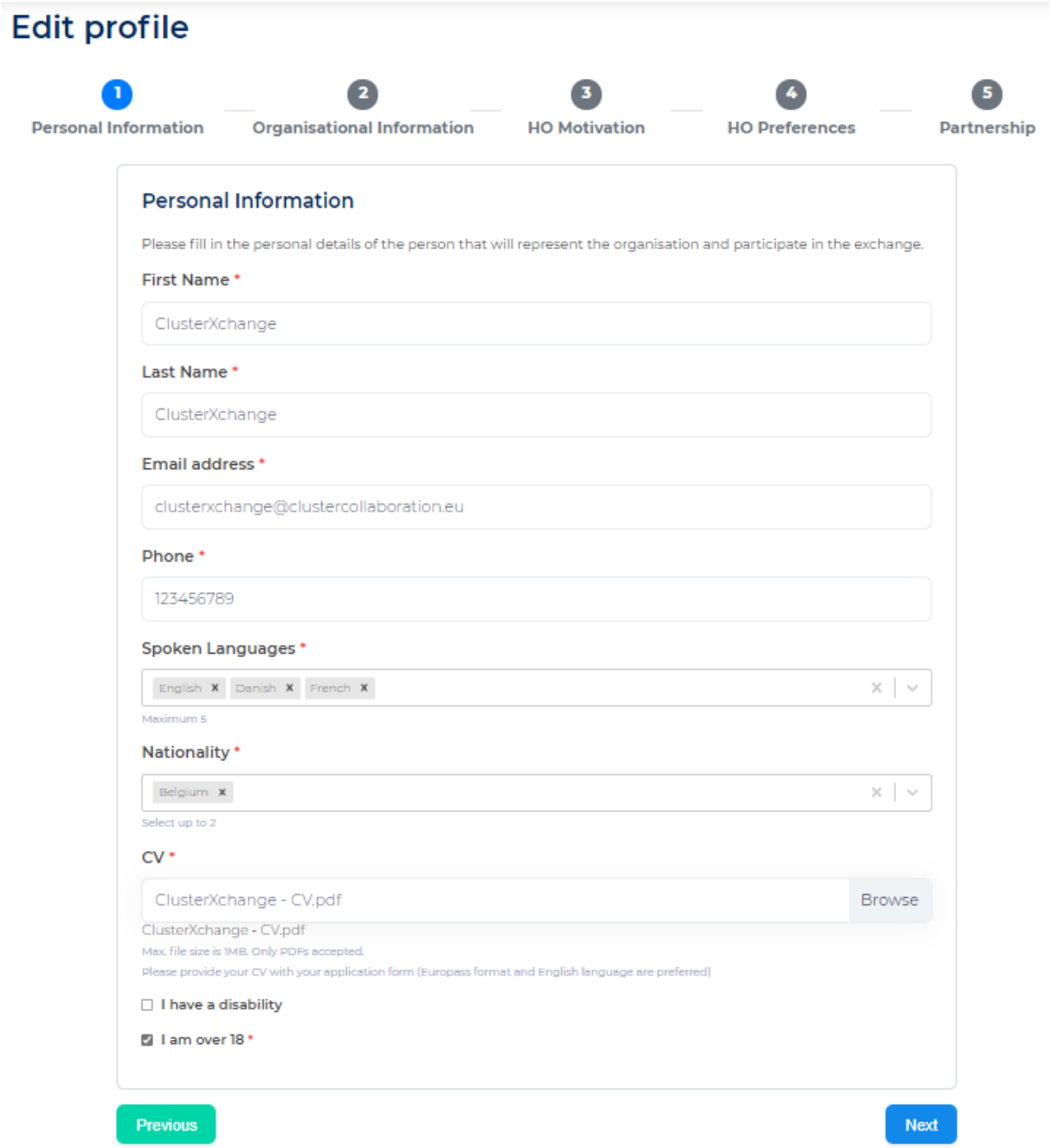

Figure 12: My Profile – step 1: personal information (HO)

Organisational Information

After submitting the personal information page, the system will take you to the organisational information. The system will automatically save the information entered as you move to the next step and in case of interruption, all the data will be saved as a 'draft' profile[13]. Here, you are requested to fill in data about your organisation. Please note that the

[13] To access the profile(s) saved by the IT Tool, the user can go to the IT Tool dashboard (see Figure 3) and click on 'View' or 'Edit' buttons in the box for the available profiles.

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 also be 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 (Figure 13). 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 case, you will need to request the association of your user account first to your organisation´s ECCP profile. This can be done by sending a request to the administrator of the ECCP profile[14]. 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 14 and Figure 15. 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 crosscheck the information provided and complete the cells marked in Red.

[14] For administrators of Excellence Partnerships: New administrators of an ECCP profile are manually added to the administrators list either by other existing administrators of the profiles, the ECCP IT Team or in case this is related to the Partnerships, the SO can be contacted as well. The administrators can be contacted directly by email. The ECCP and SO teams can be contacted through email at Contact Cluster Collaboration - *contact@clustercollaboration.eu* or *clusterxchange@clustercollaboration.eu*, respectively.

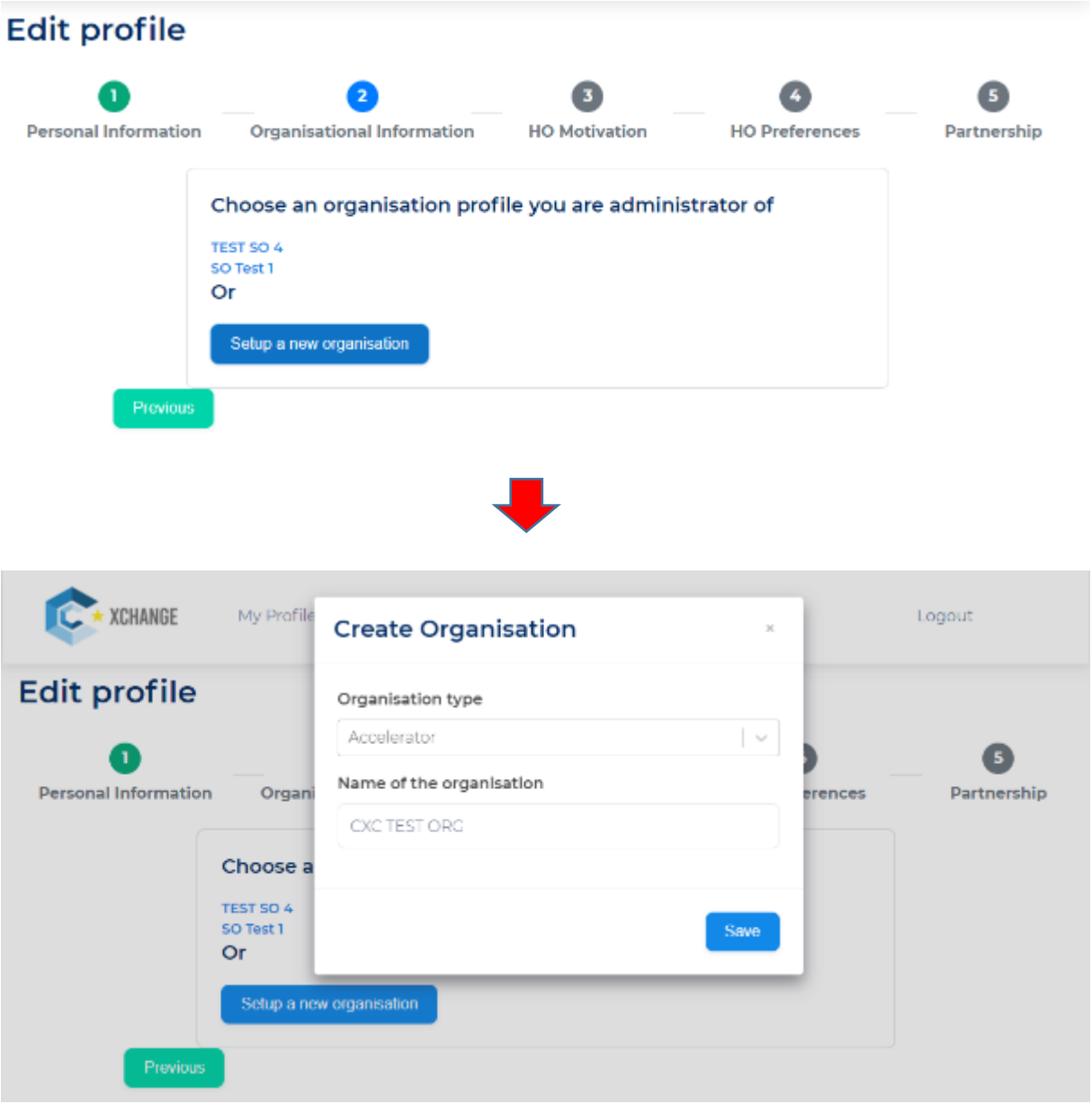

Figure 13: My Profile – step 2: organisational information 1 (HO)

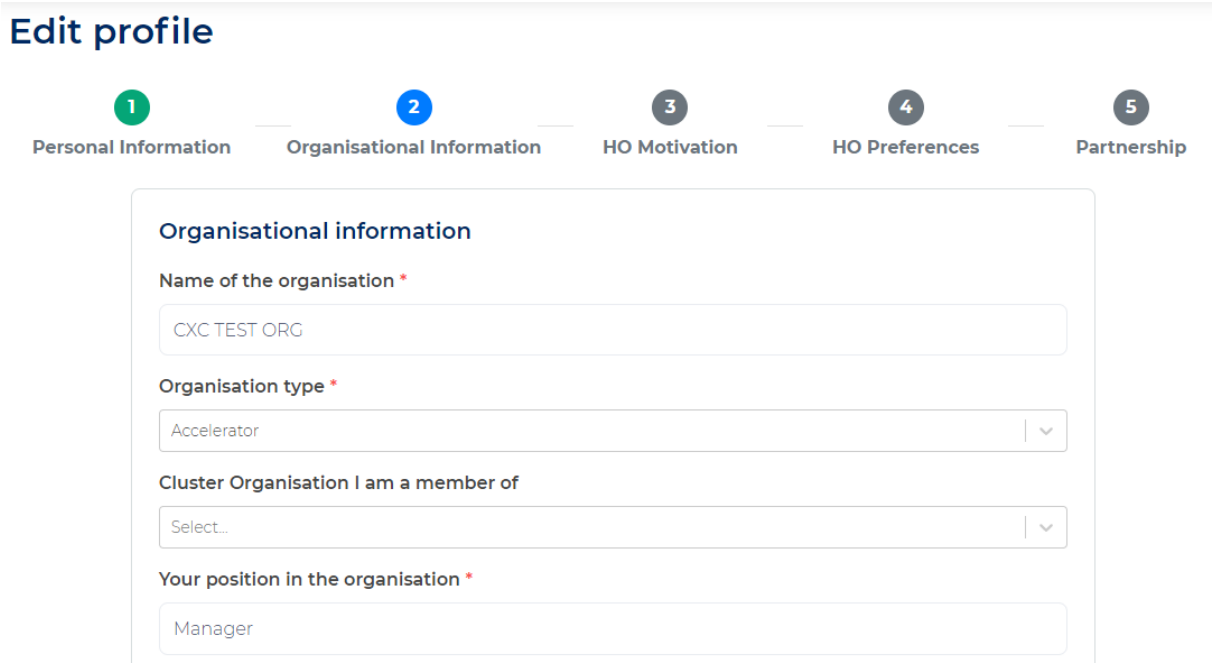

Figure 14: My Profile – step 2: organisational information 2 (HO)

Street address *

R. X 123

City *

Nice

Postal Code *

123456

Country *

France

Sector(s) of activity - primary and secondary *

Crop and animal production, hunting and related service activities × Fishing and aquaculture ×

Select maximum 2

Legal Form

Description / Mission *

2500 characters maximum, 2496 characters left

TEST

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

http://www.abcde.in

Brochure

Brochure Browse

Max. file size is 2MB. Only PDFs

Previous Next

Figure 15: My Profile – step 2: organisational information 3 (HO)

HO Motivation

Two questions are used to assess the motivation of participants planning to be involved as HOs in an exchange under CXC (Figure 16). 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 4) as these details will be visible to 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 crosscheck the information provided and complete the cells marked in Red.

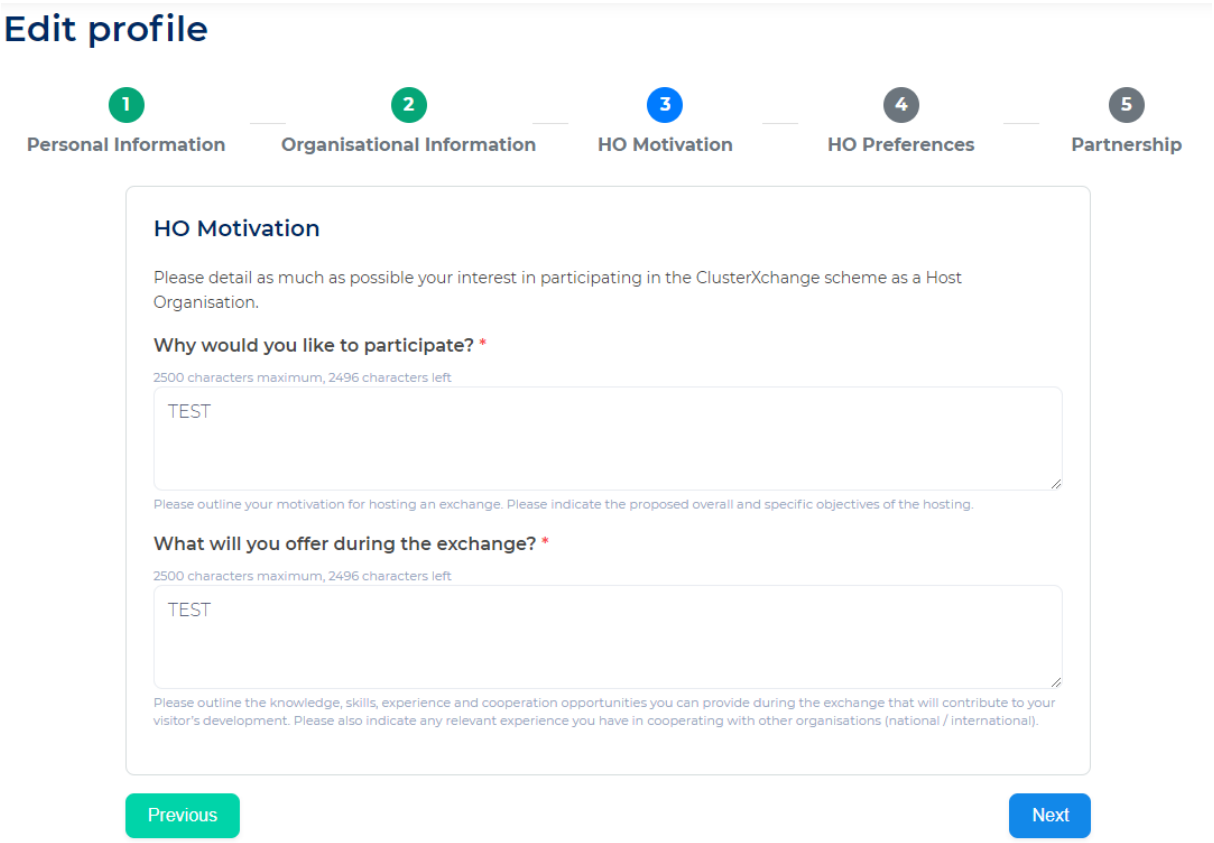

Figure 16: My Profile – step 3: HO motivation (HO)

HO Preferences

The fourth page (Figure 17) 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 or more types of preferred exchange types. The options available in the dropdown 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 crosscheck the information provided and complete the cells marked in Red.

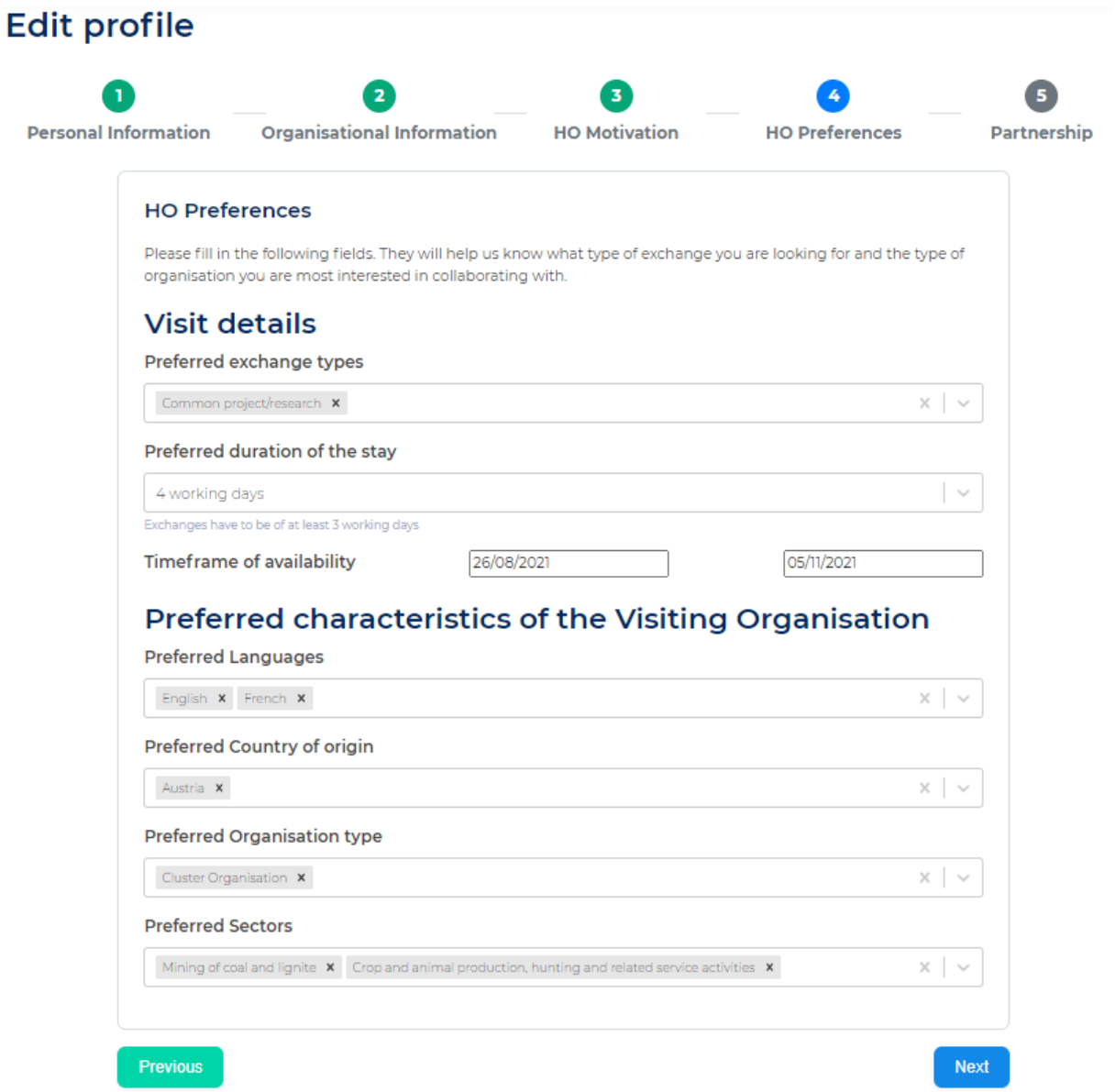

Figure 17: My Profile – step 4: HO preferences (HO)

Partnership

The last step is to select a Partnership as a contact point. This is shown in Figure 18. 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 Assignment' also exists to let the system automatically select a Partnership for you. The selection is done using an algorithm.

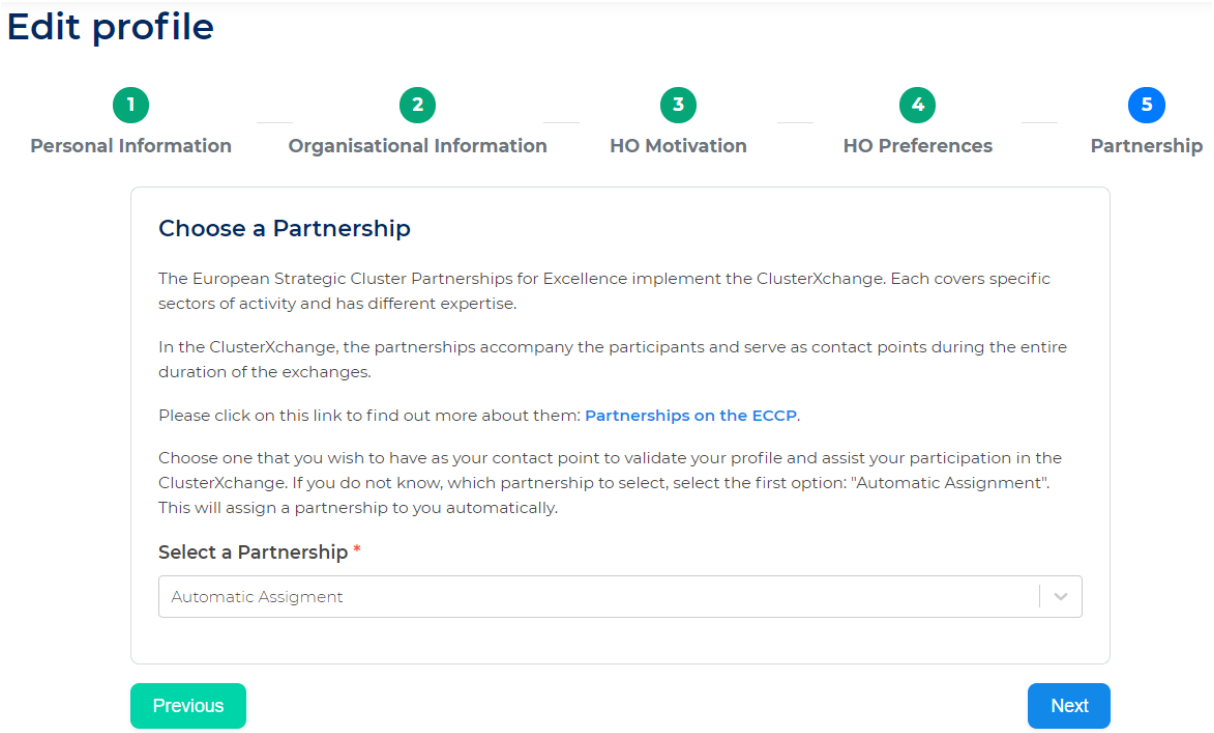

Figure 18: My Profile – step 5: partnership in charge of the or HOP (HO)

3.1.3 STEP 3 – Submission and Validation

As the user submits the profile, the IT Tool provides an overview of the information. Figure 19Figure 19 shows an example.

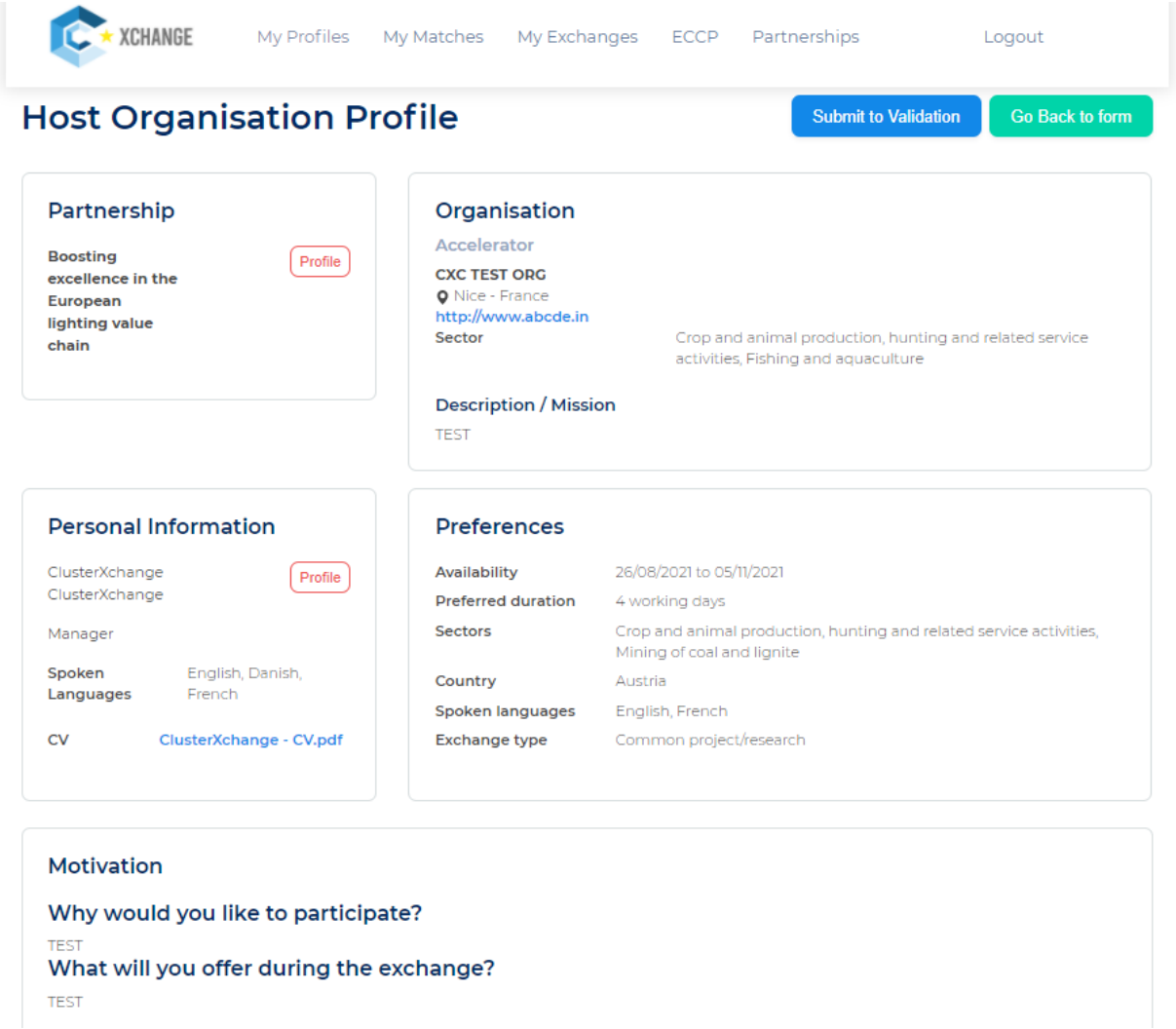

Figure 19: HO organisation profile overview

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 to validation' or to edit the form further 'Go back to form'. Figure 20 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.

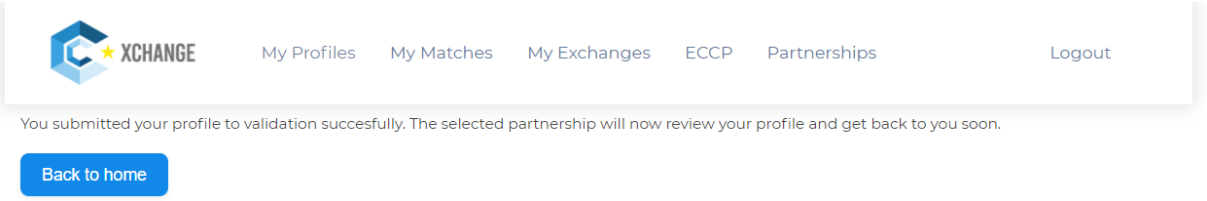

Figure 20: Final confirmation – profile submission for validation

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

Editing a user profile after submission

Once a user profile has been submitted, the user alone cannot make changes on the profile. If the user wishes to make changes in the submitted profile, he/she can contact the respective Partnership or the CXC SO[15]. The profile can be sent back to 'draft' either by the respective Partnership or the CXC SO. After making the changes, the user needs to resubmit the profile to the same or different Partnership (i.e., in case sending the profile back to draft was due to needing to change the Partnership that would be responsible for the profile).

[15] The users can contact the coordinators of their respective Partnerships on ECCP: https://clustercollaboration.eu/eu-cluster-partnerships/escp-4x; and the CXC SO can be contact by email: clusterxchange@clustercollaboration.eu.

3.2 Registration guide for Visiting Organisations (VO)

3.2.1 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 European Innovation Council and Small and Medium-sized Enterprises Executive Agency (EISMEA) 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:

- Cluster organisations[16] and similar business network organisations[17] 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 in Figure 21.

The European Union's SME definition

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

- Enterprise category: Small or medium-sized
- Head count: < 250
- Turnover: ≤ € 50 million Or Balance sheet total of ≤ € 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 can be found at:
http://ec.europa.eu/growth/smes/business-friendly-environment/sme-definition_en

[16] '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".
[17] See footnote 1 on page 9

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

Figure 21: 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[18], research institutes, fab labs, [digital] innovation hubs[19], creative hubs, resource-efficiency service providers[20], 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[21].

Note: Participants profiling 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 (Figure 26).

A. 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.

B. 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.

[18] 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 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

[19] 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

[20] https://www.resourceefficient.eu/en/support-organisations

[21] It must be noted that large companies, public authorities, innovation agencies, universities and other types of entities different from the above listed organisation types are not considered eligible. In exceptional circumstances, organisations under the last two bullet points that are not members of cluster organisations profiled on ECCP can take the role of the HO (but not the role of the VO). This will be accepted following a case-by-case assessment and pre-approval of the European Innovation Council and Small and Medium-sized Enterprises Executive Agency (EIASMEA).

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 TFEU16[22], 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).

Sections 3.2.2 and 3.2.3 discuss in detail the process of profile creation, submission, and validation. **Error! Reference source not found.** presents a scheme to simplify and graphically explain these processes.

[22] 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).

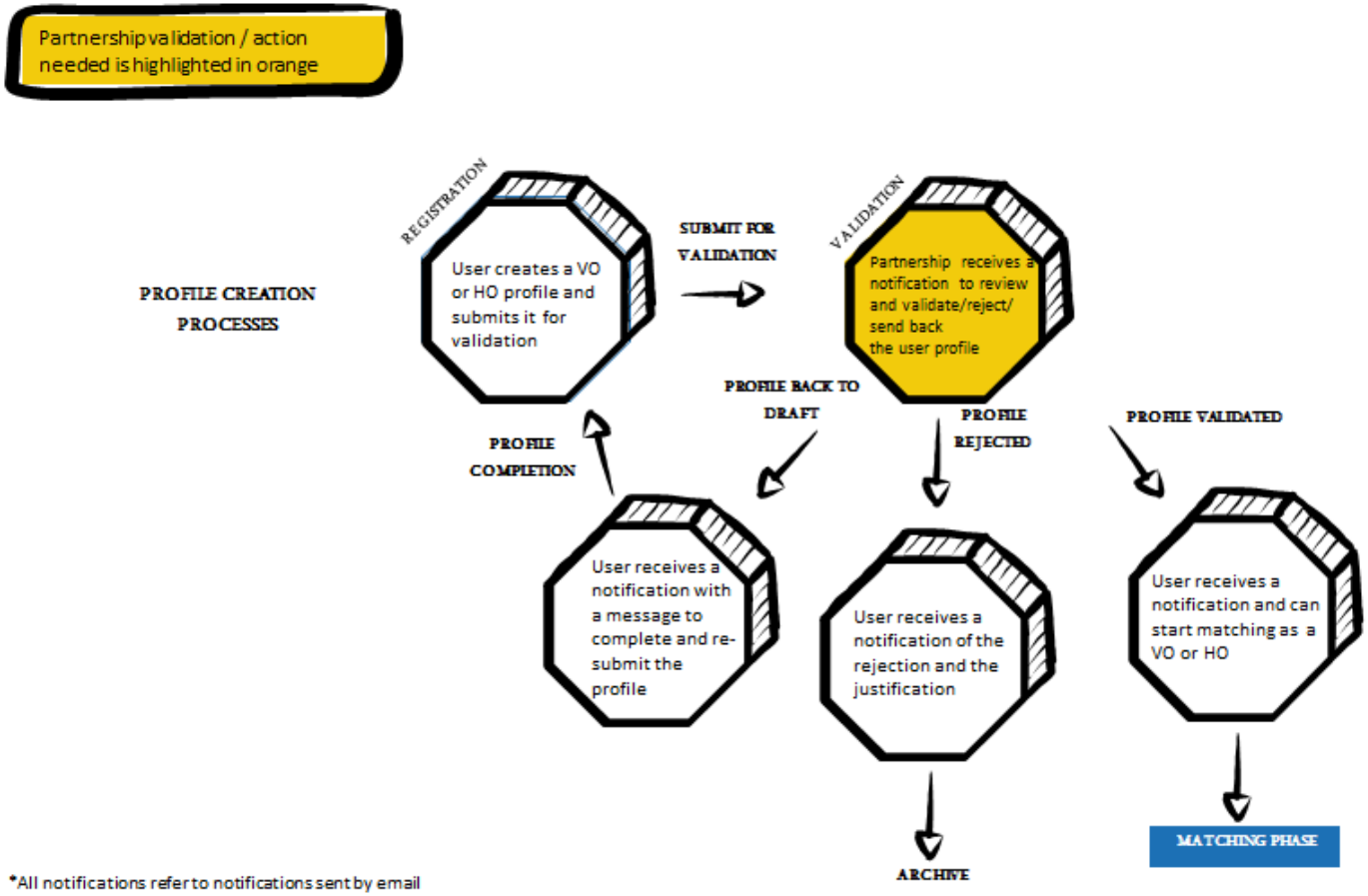

Figure 22: Overview of the processes involved for the registration of a VO

3.2.2 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 23. As a first step of profile creation, select the type of profile you wish to create on the IT Tool dashboard (Figure 23).

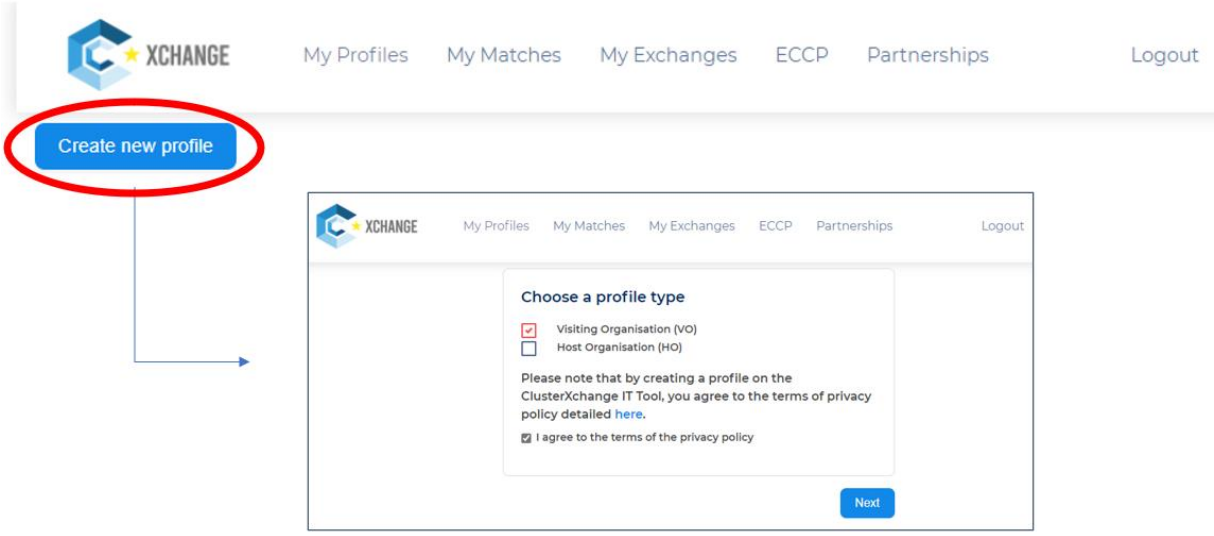

Figure 23: Create a new profile and choose a profile type (VO)

Personal Information

As can be seen in Figure 24, the fields on Page 1 of profile creation include personal 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/ies 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 crosscheck the information provided and complete the cells marked in Red.

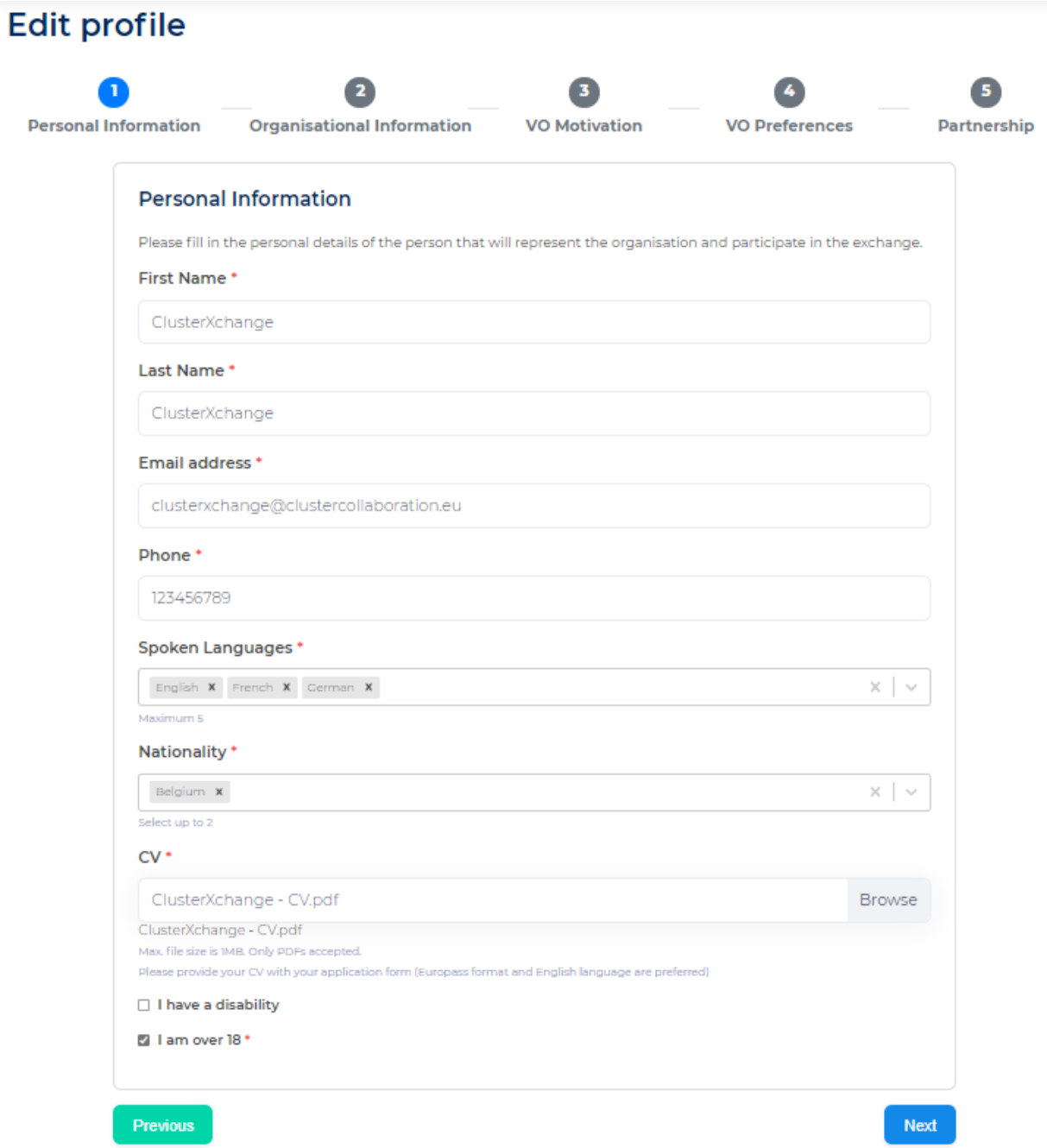

Figure 24: My Profile – step 1 : personal information (VO)

Organisational Information

After submitting the personal information page, the system will take you to the organisational information. The system will automatically save the information entered as you move to the next step and in case of interruption, all the data will

be saved as a 'draft' profile[23]. 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 also be profiled on ECCP.

It is to be noted that a CXC profile (HO/VO) created on the IT Tool can be associated only to 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.

In case your organisation has a profile on ECCP, the IT Tool will identify it and add it to your CXC profile (Figure 25). 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 case, you will need to request the association of your user account first to your organisation´s ECCP profile. This can be done by sending a request to the administrator of the ECCP profile[24]. Contact details are generally included as part of the organisation profiles.

The organisational form is included in Figure 26 and Figure 27. 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 crosscheck the information provided and complete the cells marked in Red.

[23] To access the profile(s) save by the IT Tool, the user can go to the IT Tool dashboard (see Figure 13) and click on 'View' or 'Edit' buttons in the box for the available profiles.

[24] For administrators of Excellence Partnerships: New administrators of an ECCP profile are manually added to the administrators list either by other existing administrators of the profiles, the ECCP IT Team or in case this is related to the Partnerships, the SO can be contacted as well. The administrators can be contacted directly by email. The ECCP and SO teams can be contacted through email at Contact Cluster Collaboration - *contact@clustercollaboration.eu* or *clusterxchange@clustercollaboration.eu*, respectively.

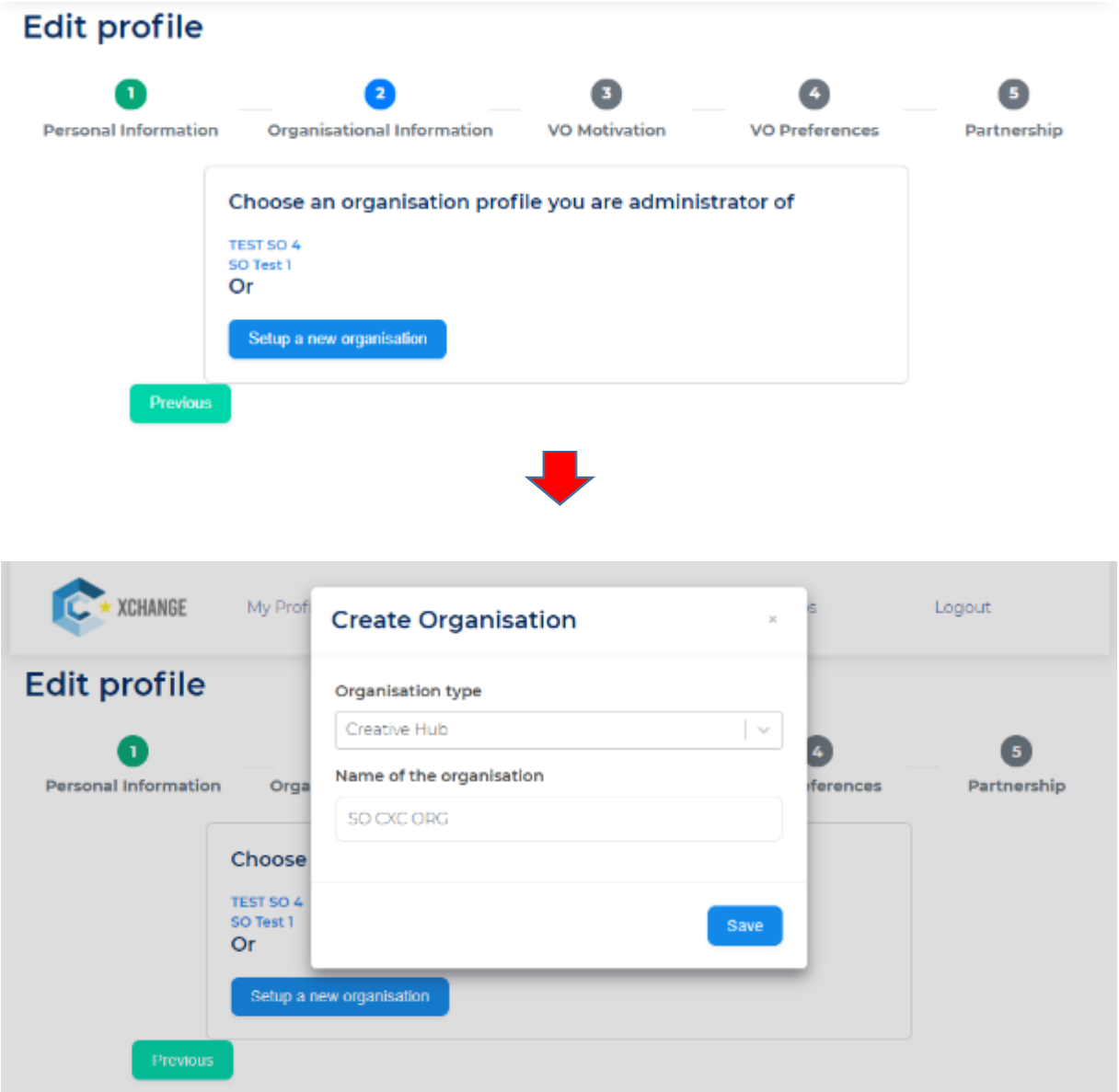

Figure 25: My Profile – step 2: organisational information 1 (VO)

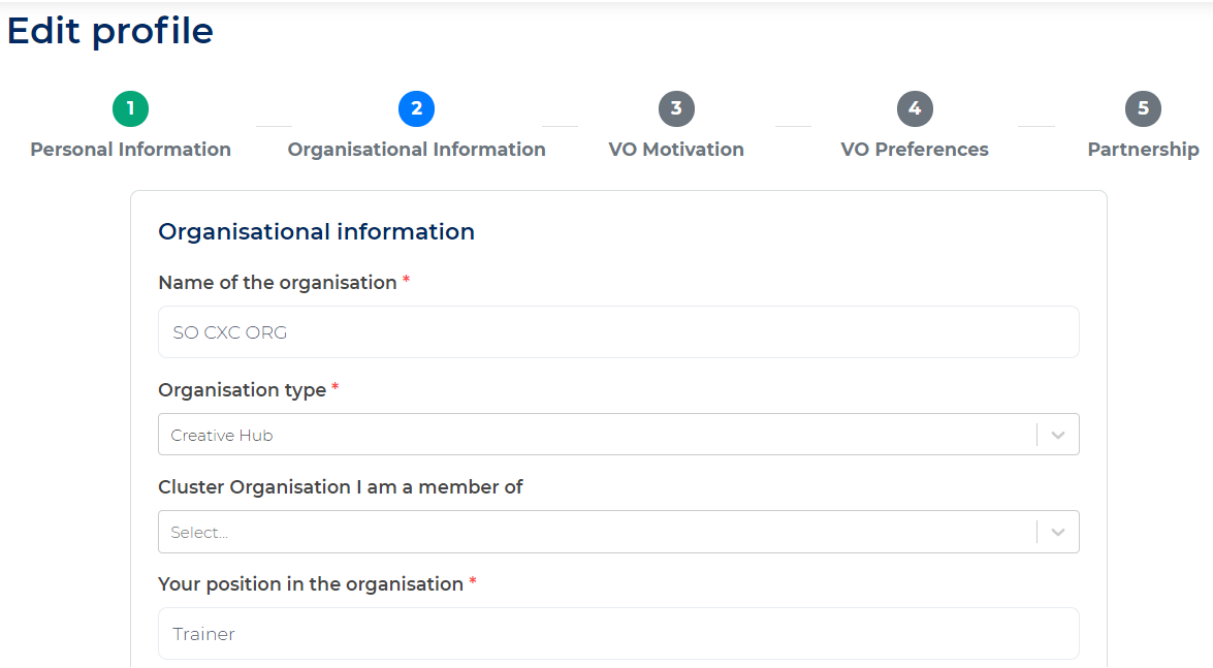

Figure 26: My Profile – step 2: organisational information 2 (VO)

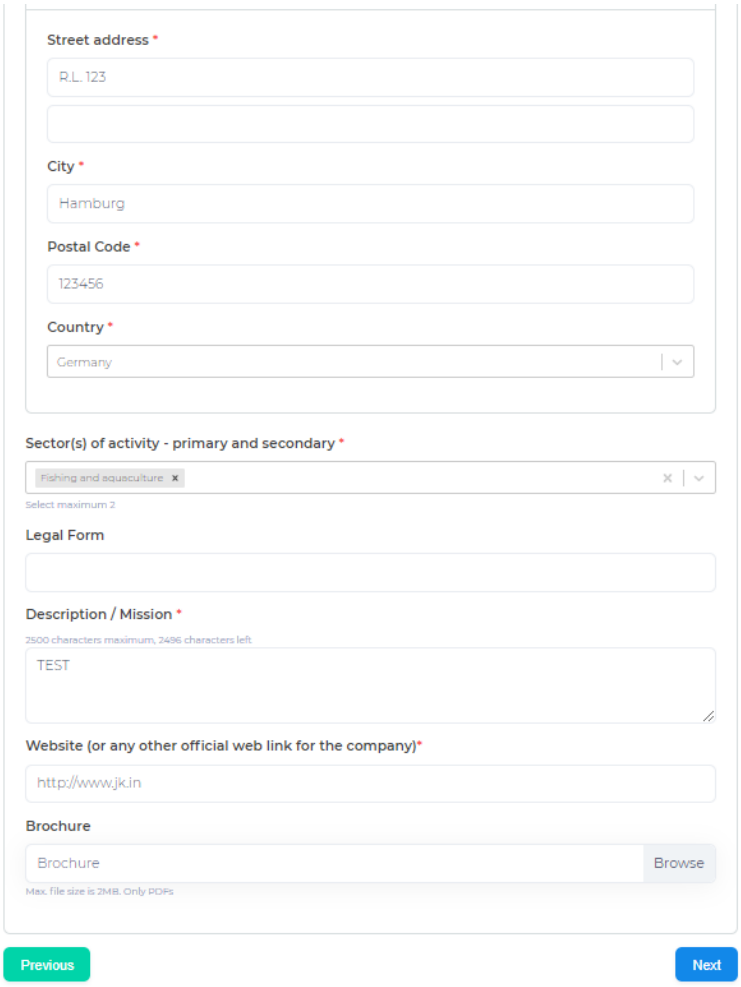

Figure 27: My Profile – step 2: organisational information 3 (VO)

VO Motivation

Two questions are used to assess the motivation of participants planning to be involved as VOs in an exchange under CXC (Figure 28). 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 4) as these details will be visible to the HO 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 crosscheck the information provided and complete the cells marked in Red.

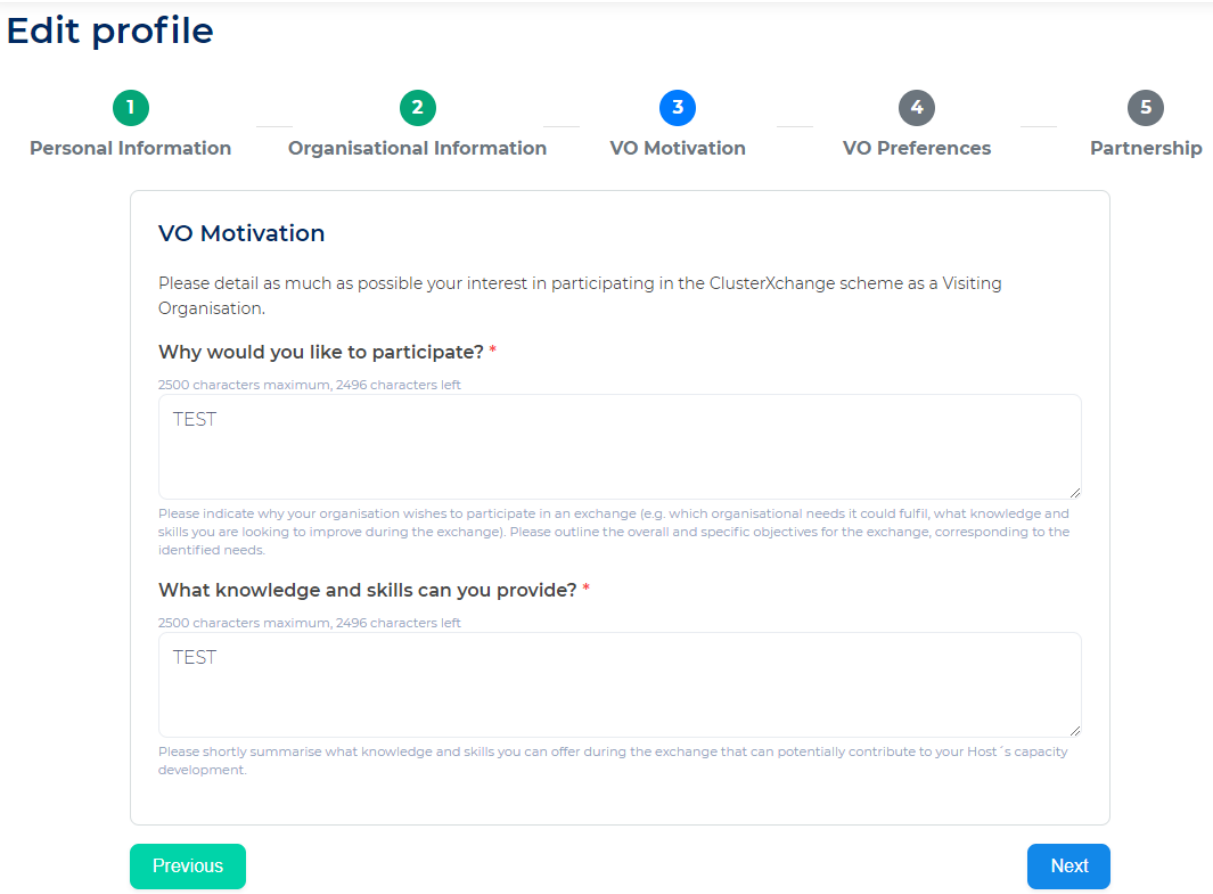

Figure 28: My Profile – step 3: VO motivation (VO)

VO Preferences

The fourth page (Figure 29Figure 29) 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 dropdown 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 crosscheck the information provided and complete the cells marked in Red.

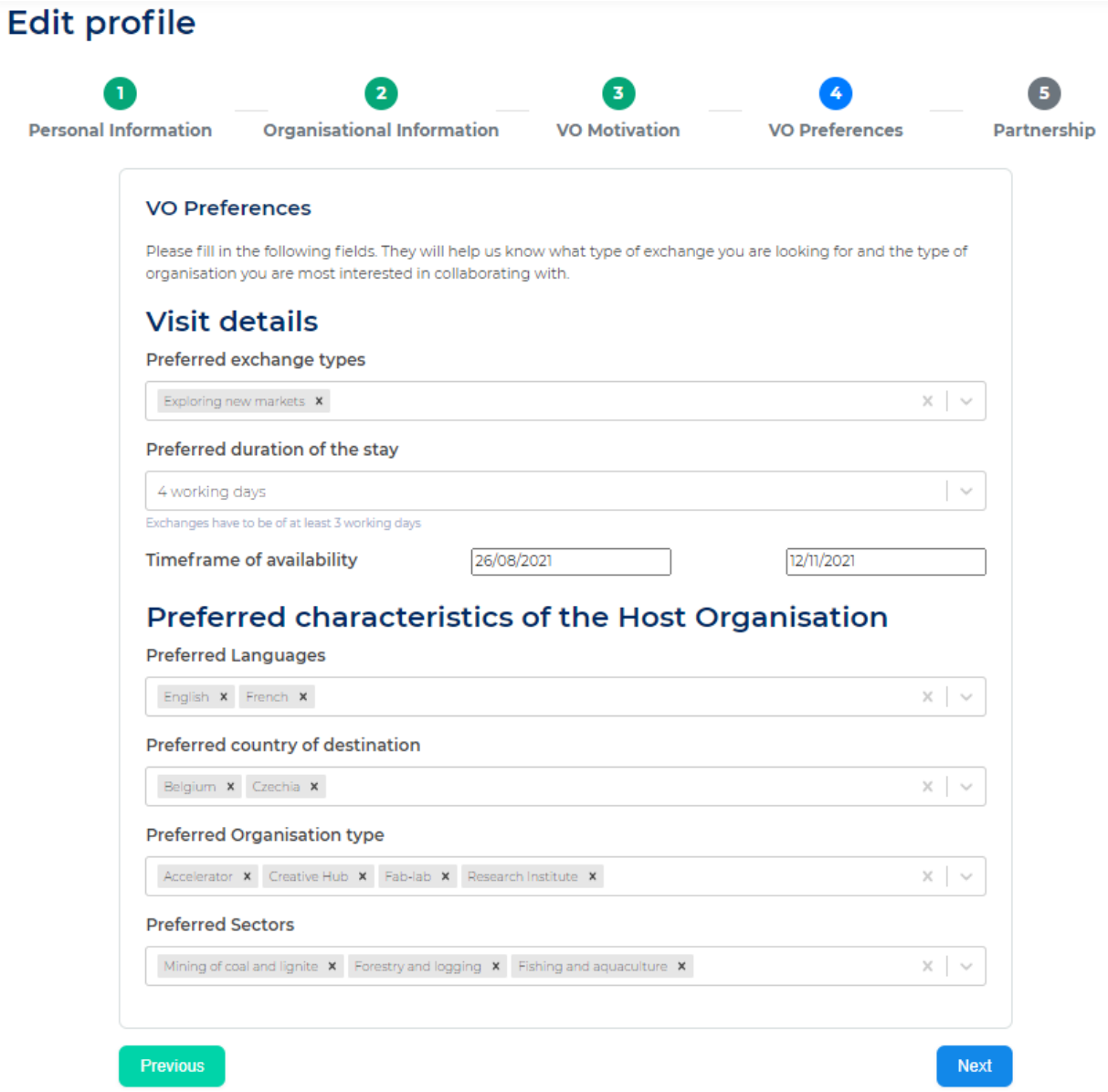

Figure 29: My Profile – step 4: VO preferences (VO)

Partnership

The last step is to select a Partnership as a contact point. This is shown in Figure 30. 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 Assignment' also exists to let the system automatically select a Partnership for you. The selection is done using an algorithm.

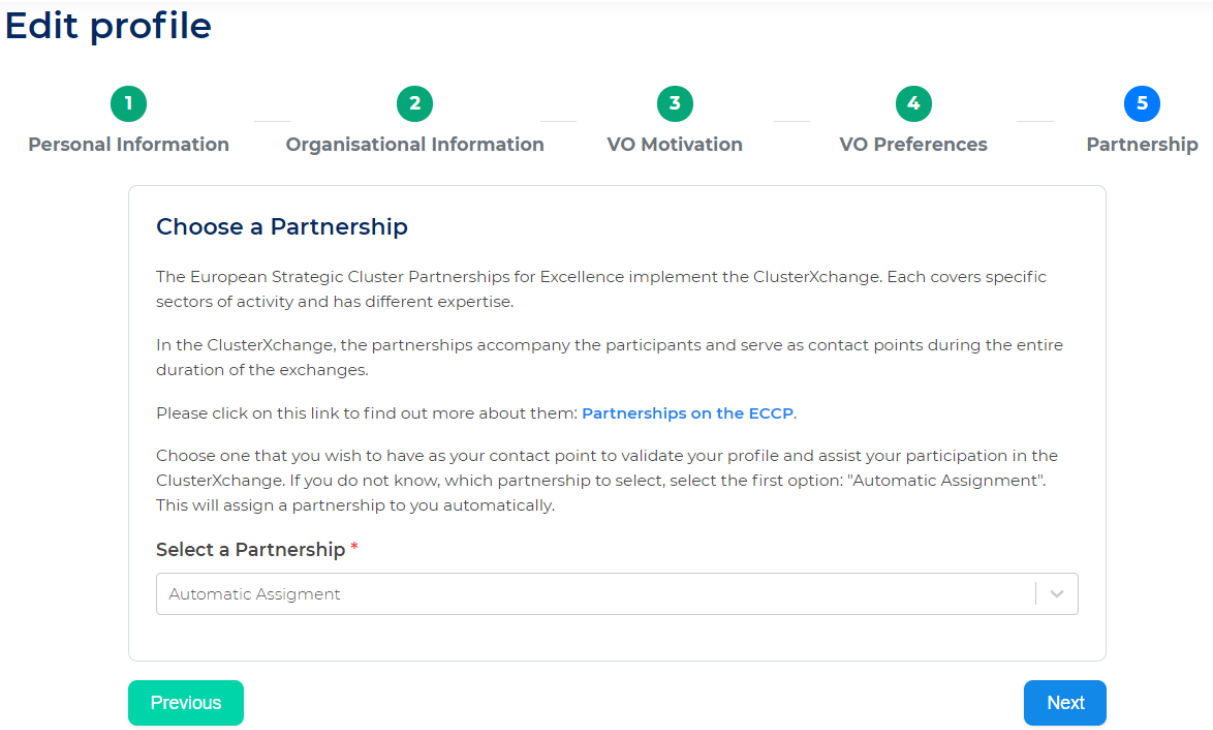

Figure 30: My Profile – step 5: partnership in charge of the VO or VOP

3.2.3 STEP 3 – Submission and Validation

As the user submits the profile, the IT Tool provides an overview of the information. Figure 31 shows an example.

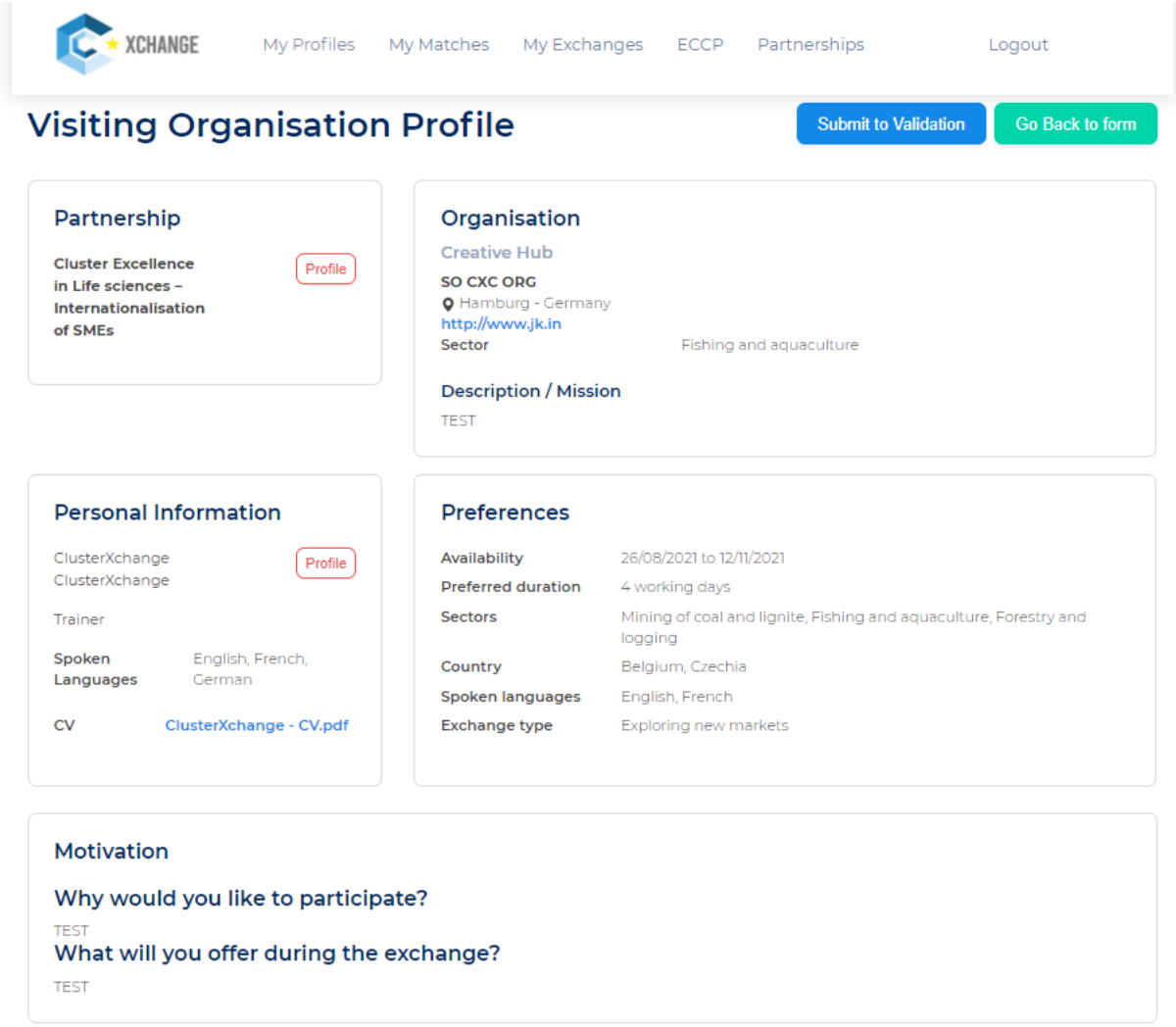

Figure 31: VO organisation profile overview

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 32 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.

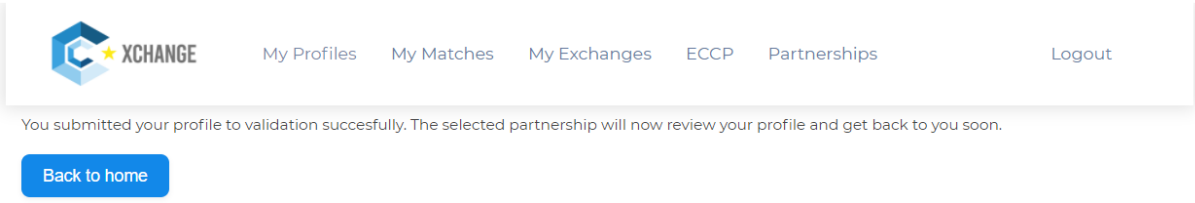

Figure 32: Final confirmation – profile submission for validation

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

Editing a user profile after submission

Once a user profile has been submitted, the user alone cannot make changes on the profile. If the user wishes to make changes in the submitted profile, he/she can contact the respective Partnership or the CXC SO[25]. The profile can be sent back to 'draft' either by the respective Partnership or the CXC SO. After making the changes, the user needs to resubmit the profile to the same or different Partnership (i.e., in case sending the profile back to draft was due to needing to change the Partnership that would be responsible for the profile).

[25] The users can contact the coordinators of their respective Partnerships on ECCP: https://clustercollaboration.eu/eu-cluster-partnerships/escp-4x; and the CXC SO can be contact by email: clusterxchange@clustercollaboration.eu.

3.3 Registration guide for Host and Visiting Organisations (HO & VO) simultaneously

3.3.1 STEP 1 – Eligibility check

To read about the eligibility criteria and checks for HOs and VOs, please see Section 3.1.1 – STEP 1 – Eligibility check (HO) and Section 3.2.1 – STEP 1 – Eligibility check (VO). Figure 33 presents a scheme to simplify and graphically explain these processes.

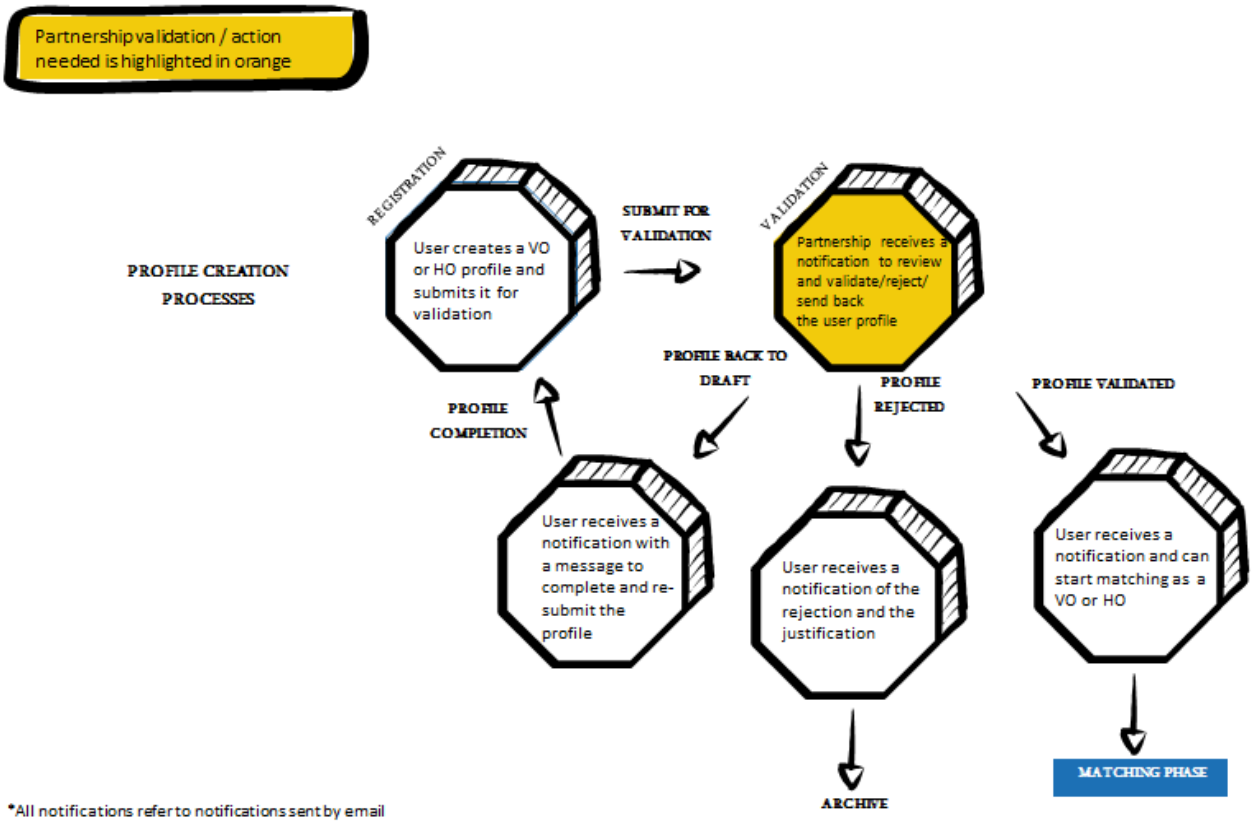

Figure 33: Overview of the processes involved for the registration of an HO and a VO

3.3.2 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 34. As a first step of profile creation for an HO and VO simultaneously, select both profile types on the 'Choose a profile type' section.

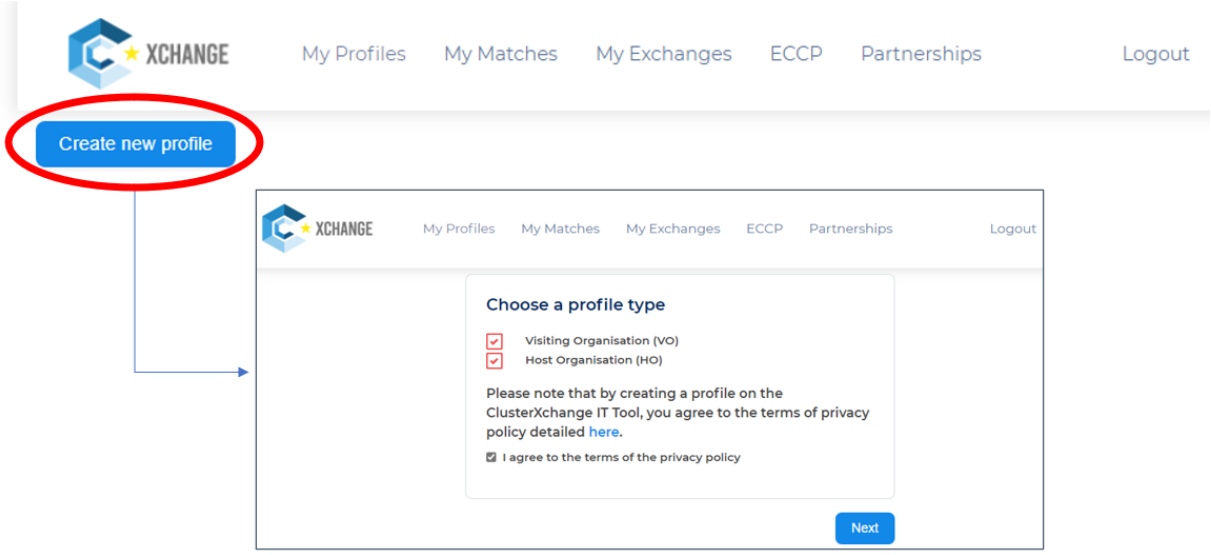

Figure 34: Create new profiles and select the profile types for the HO and VO

Personal Information

As can be seen in Figure 35, the fields on Page 1 of profile creation include personal details, contact information, nationality, spoken language portfolio, and CV upload. The user is requested to upload the full personal CVs with a maximum admissible size up to 1MB in a PDF format. Note that both profiles will have the same user or representative of an organisation whose persona information is submitted in this step. There is an option towards the end of the page to tick mark if the user has a disability/ies 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 (See Section 3.2.2 – My profile: Personal Information). Information regarding any disability may also be important for the preparation of the visit as an HO. At the end of the form filling, the user must crosscheck the information provided and complete the cells marked in Red.

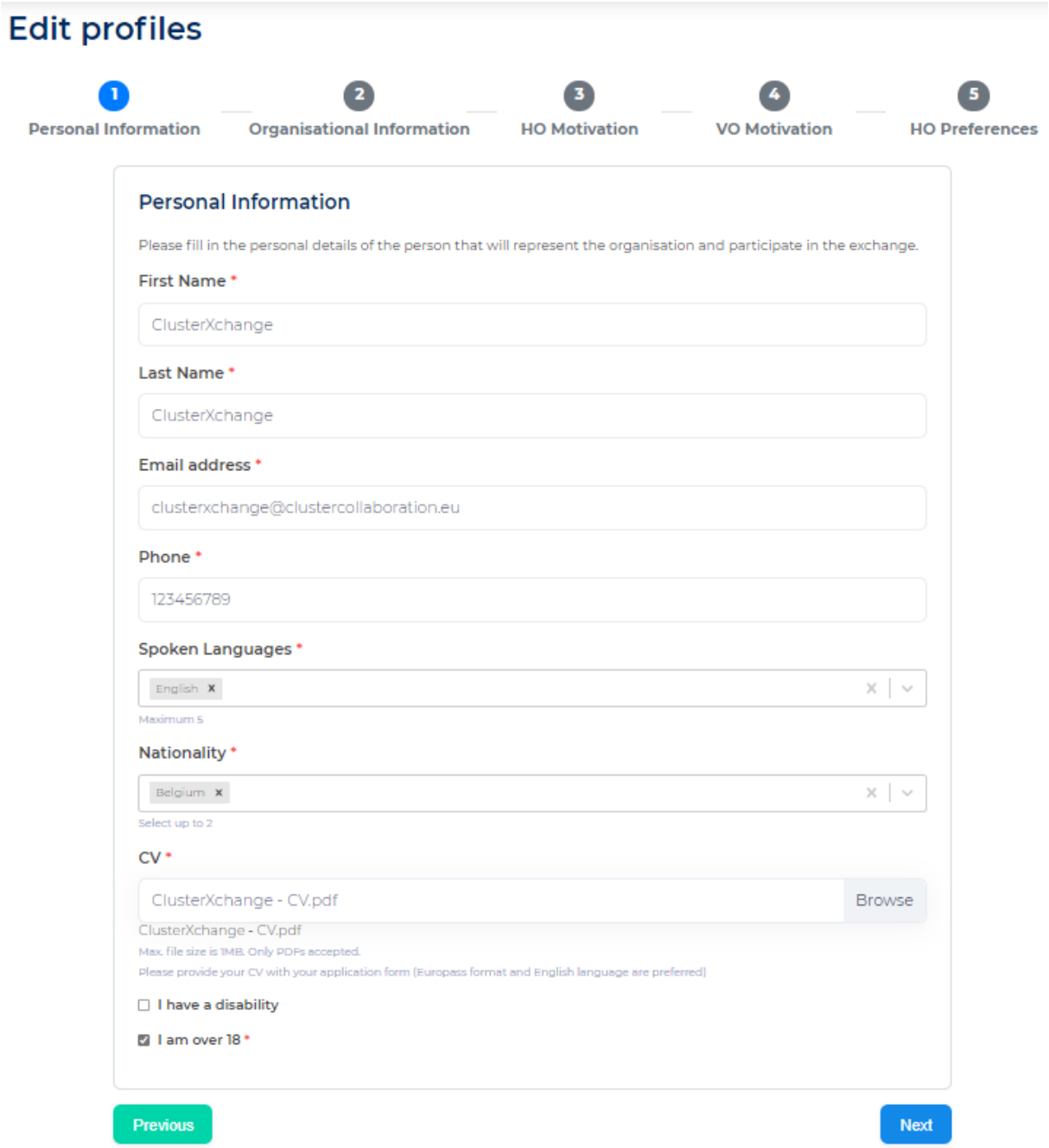

Figure 35: My Profile – step 1: personal information (HO & VO)

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 profiled on ECCP. Note that the same organisation is profiled as the HO and VO. In case your organisation has several registered establishments

in different EU Member States or other participating countries and you want to register different branches in the HO and VO profiles, you need to create HO and VO profiles separately (See Section 3.1 and 3.2 – Registration guide for HO/ Registration guide for VO).

It is to be noted that both CXC profiles 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 single organisational form is included in Figure 37 and Figure 38. 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 crosscheck the information provided and complete the cells marked in Red.

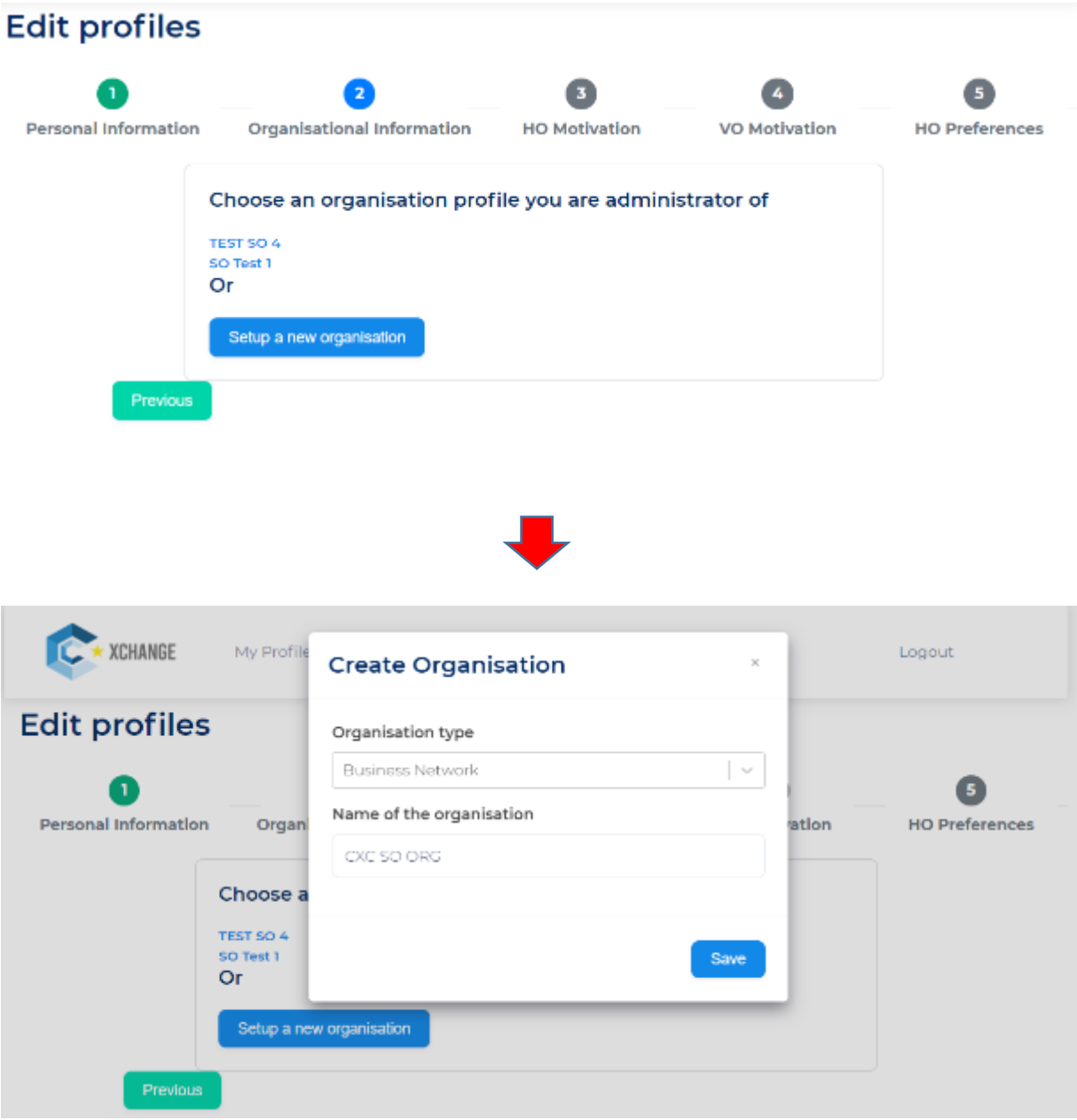

Figure 36: My Profile – step 2: organisational information 1 (HO & VO)

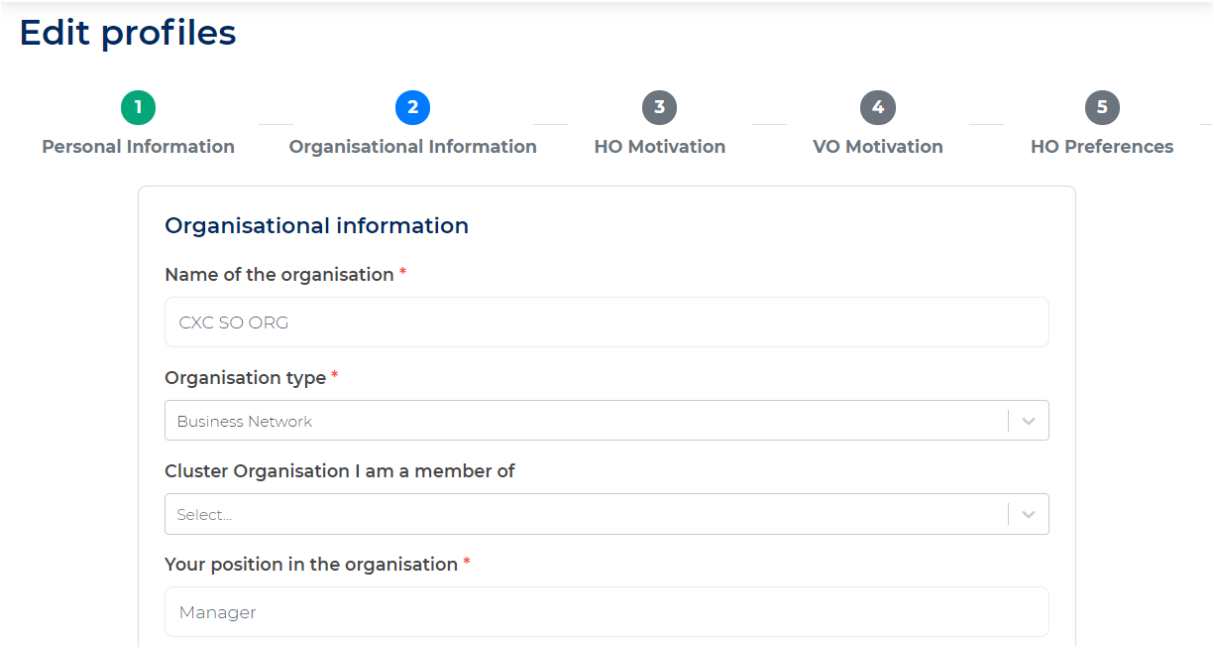

Figure 37: My Profile – step 2: organisational information 2 (VO & HO)

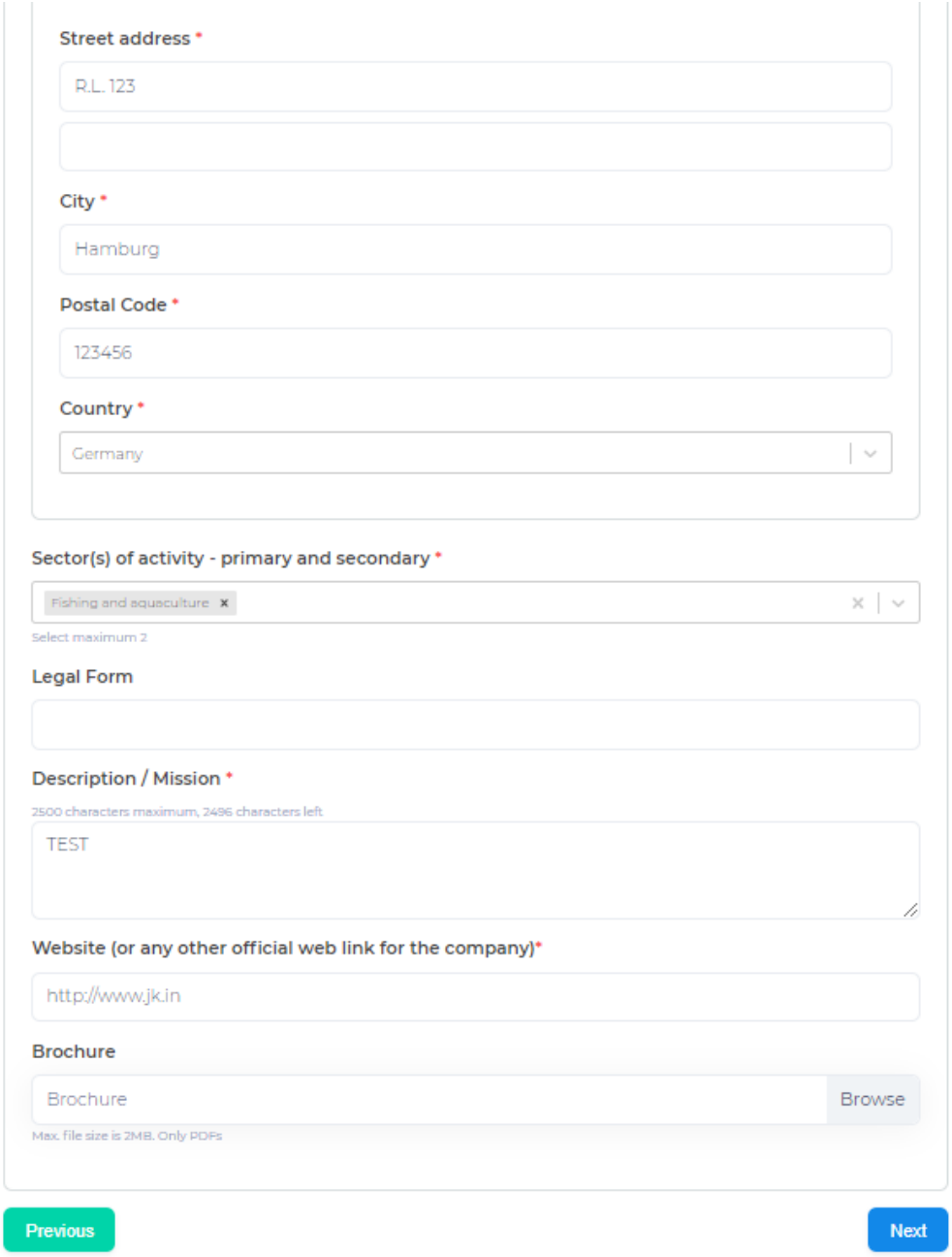

Figure 38: My Profile – step 2: organisational information 3 (VO & HO)

HO and VO Motivation

A set of four questions (Figure 39) are used to assess the motivation of participants planning to be involved as HOs and 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 or a VO for an exchange (see Chapter 4) as

these details will be visible to the HO or VO profile owners that are registered in the IT Tool. This information, therefore, can be helpful for the counterpart (HO or VOs) 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 crosscheck the information provided and complete the cells marked in Red.

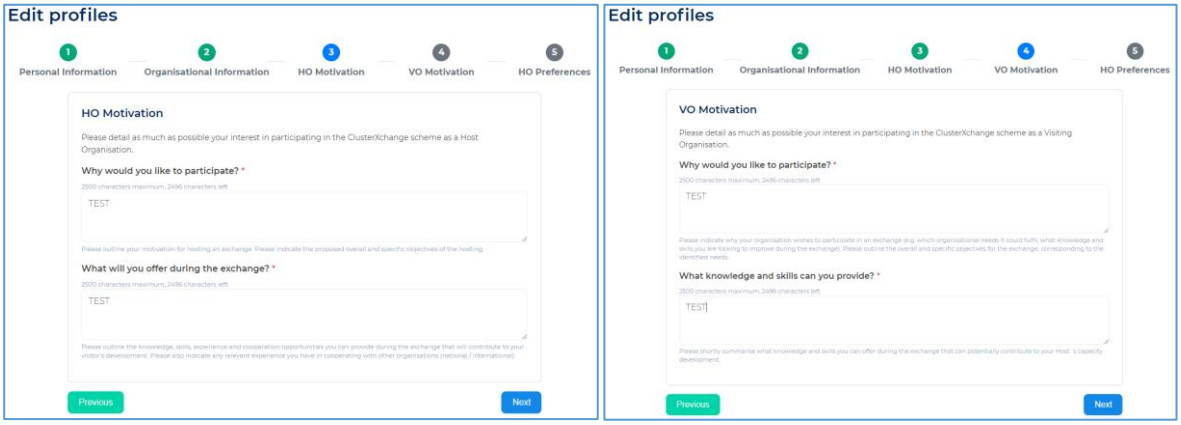

Figure 39: My Profile – step 3 and 4: HO motivation (left) and VO motivation (right)

HO and VO Preferences

The fifth page (Figure 40) of the profile is about visit-related preferences and preferred HO and VO characteristics from the user's point of view. Here the user can select one or more types of preferred exchange types separately for the HO and VO. The options available in the dropdown menu are:

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

In these steps you should also indicate your time availability for an exchange / for exchanges for the HO and VO. Users are requested to fill the details such as the preferred duration of stay, timeframe of availability with as much precision as possible. The preferred date the VO and HO do not need to be the same. However, 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 crosscheck the information provided and complete the cells marked in Red.

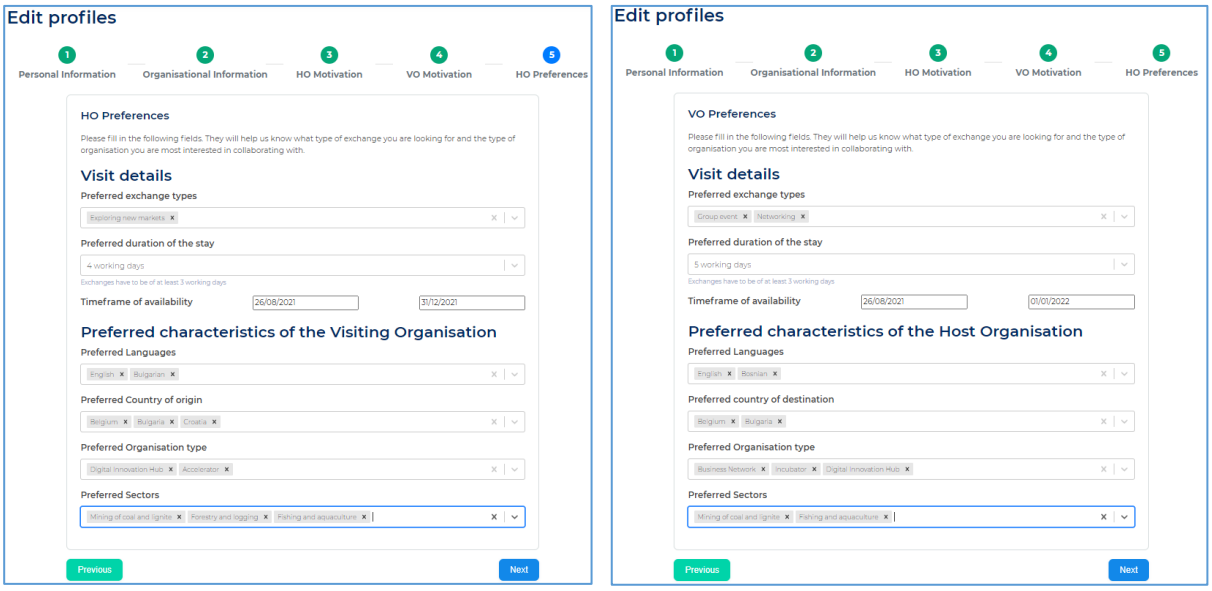

Figure 40: My Profile – step 5: HO preferences (left) and VO preferences (right)

Partnership

The last step is to select one Partnership as a contact point, as shown in Figure 41. This contact point will validate your HO and VO 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 Assignment' also exists to let the system automatically select a Partnership for you. The selection is done using an algorithm.

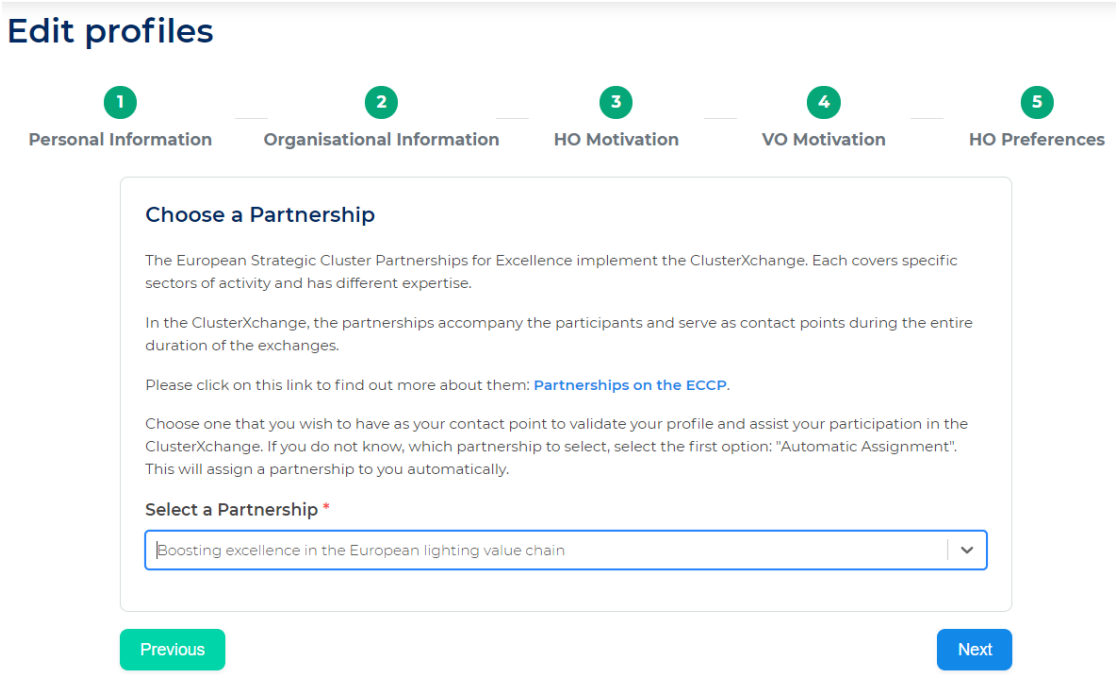

Figure 41: My Profile – step 6: the partnership in charge of the VO (VOP) and HO (HOP)

3.3.3 STEP 3 – Submission and Validation

As the user submits the profiles, the IT Tool provides an overview of the information for both profiles. Figure 42 shows an example.

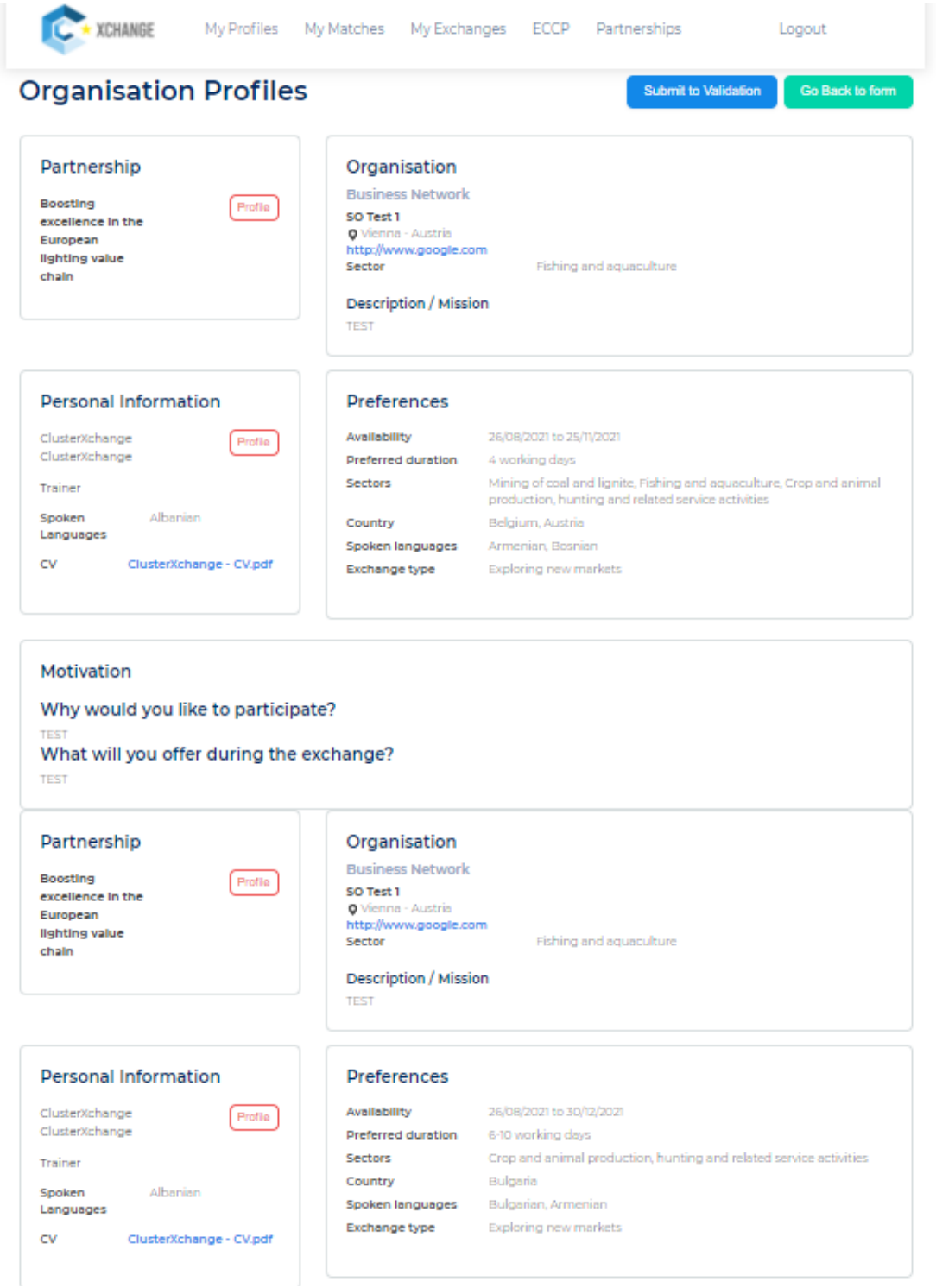

Figure 42: Organisation profile overview for the HO and VO

It is suggested that you review the entire preview of the profiles once again in order to maintain consistency of information. The profile preview provides options to either submit the form for validation: 'Submit to validation' or to edit the form further 'Go back to form'. Figure 43 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.

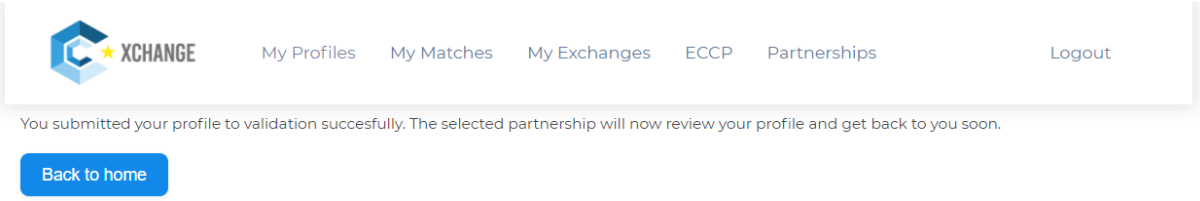

Figure 43: Final confirmation – profile submission for validation

Once the profiles have been submitted for validation, this action can lead to three results:

- **Validation -** the profiles get accepted by the Partnership (HOP and VOP) and the user can proceed to matching for both profiles
- **Rejection –** one or both profiles get rejected by the Partnership (HOP and VOP) and the user receives a reason for it
- **Draft and resubmission** – the user will receive a message to complete and resubmit one or both of the profiles

Editing a user profile after submission

Once a user profile has been submitted, the user alone cannot make changes on the profile. If the user wishes to make changes in the submitted profile, he/she can contact the respective Partnership or the CXC SO[26]. The profile can be sent back to 'draft' either by the respective Partnership or the CXC SO. After making the changes, the user needs to resubmit the profile to the same or different Partnership (i.e., in case sending the profile back to draft was due to needing to change the Partnership that would be responsible for the profile).

[26] The users can contact the coordinators of their respective Partnerships on ECCP: https://clustercollaboration.eu/eu-cluster-partnerships/escp-4x; and the CXC SO can be contact by email: clusterxchange@clustercollaboration.eu.

04

Participation

4. Participation

This chapter explains in detail the process of participation in CXC (matching and exchange building and finalisation) after the user profiles are created, submitted and validated. As depicted in Figure 44, the process involves several checkpoints requesting information or validation regarding certain aspects. The validated user profiles can initiate a match with other user profiles. After a match is validated (accepted) by both the HO and VO, exchange building starts. As part of exchange building, an exchange is prepared for validation. After the final validation of the exchange details by the VO and HO, the HOP and VOP review and validate it. The SO or EC may also randomly review and validate a built exchange. Once the exchange gets validated, it moves to the exchange finalisation 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.[27]

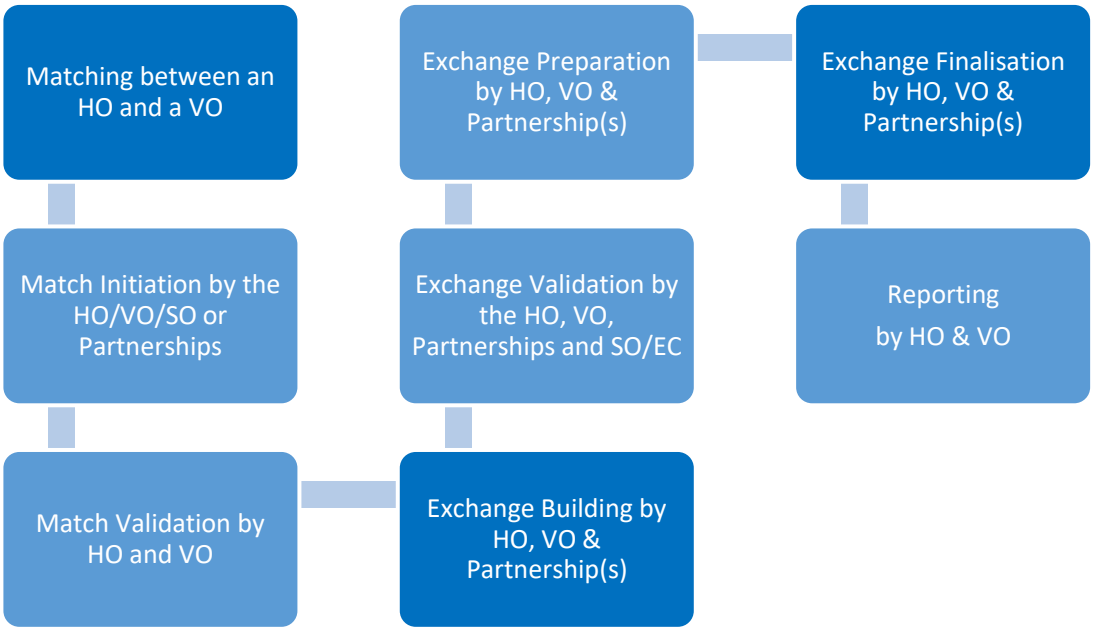

Figure 44: Matching and Exchange building and finalisation steps in the IT Tool

In the following phases, participants who are administrators on the IT Tool can retrieve statistical data concerning their Partnerships from the IT Tool. However, if profile holders are connected to a Partnership(s) but do not have the right of administrators, the functionality for extracting statical data will not be available to them. If the profile holders wish to become administrators on the IT Tool, they should contact the coordinator of the

[27] **SO/EC/EISMEA Validation**: In the pilot phase of CXC, the random selection option of the IT Tool was forgone and all the Commitments to Quality for exchanges were validated by the SO and EC services. This was a temporary procedure set up by the EC services in order to ensure the action plans and agenda comply with the rules of CXC and provide practical guidance to the Partnerships by supporting them in the Commitment to Quality development process. When the validation by SO/EC/EISMEA status return to the 'random' selection, the Partnerships and participants will be informed by the CXC SO and EC services accordingly.

Partnership they belong to and request to be granted private access. It is up to the discretion of the responsible Partnership to decide on who should be granted admin rights.

4.1. Matching

After the HO or VO profile is validated by the Partnership contact point(s), 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 45. The HOs and VOs are the primary actors in this step. The SO and/or Partnerships might intervene by proposing/initiating a match between an HO and a VO if the profiles are deemed most suited. However, only the HO and VO has the responsibility to validate or reject an initiated match.

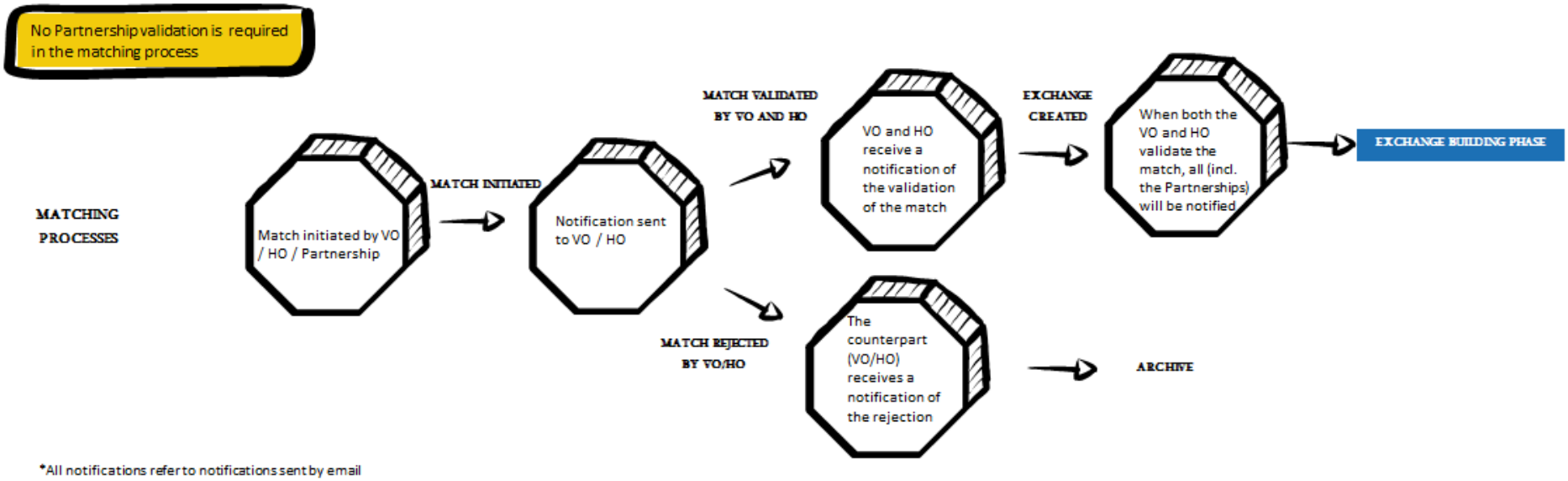

Figure 45: Overview of the processes involved in the matching phase

4.1.1 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 46. 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.

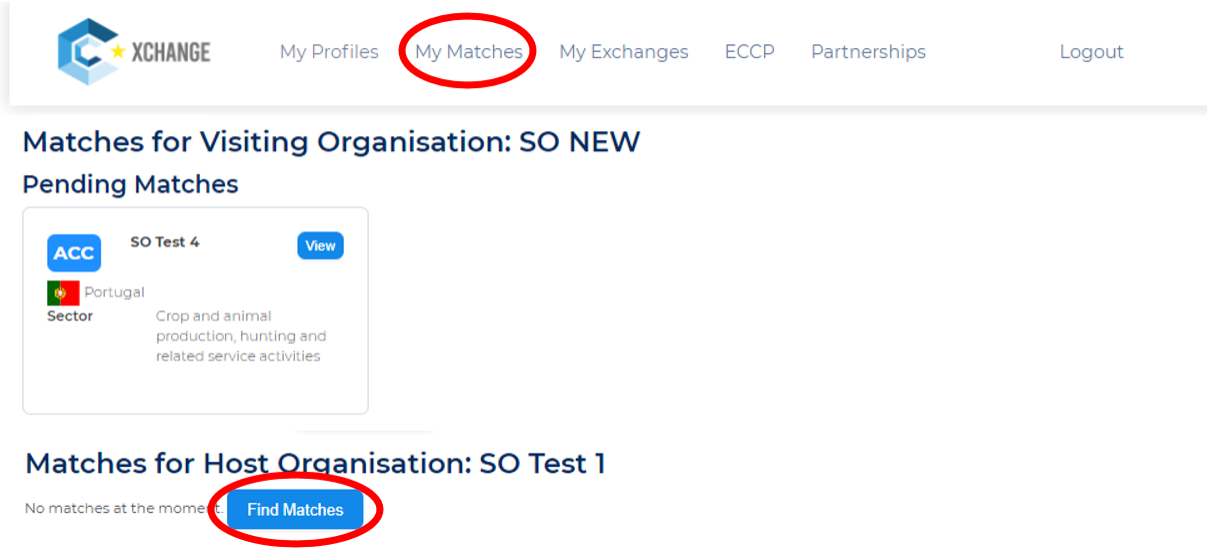

Figure 46: Pending matches for the HO

4.1.2 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 and allow the user to view a list of counterparts or 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 47.

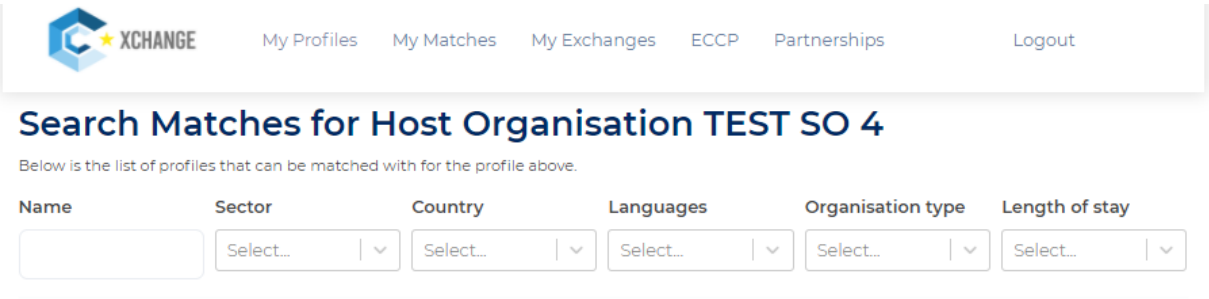

Figure 47: Types of filters provided for matching

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 48). 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.

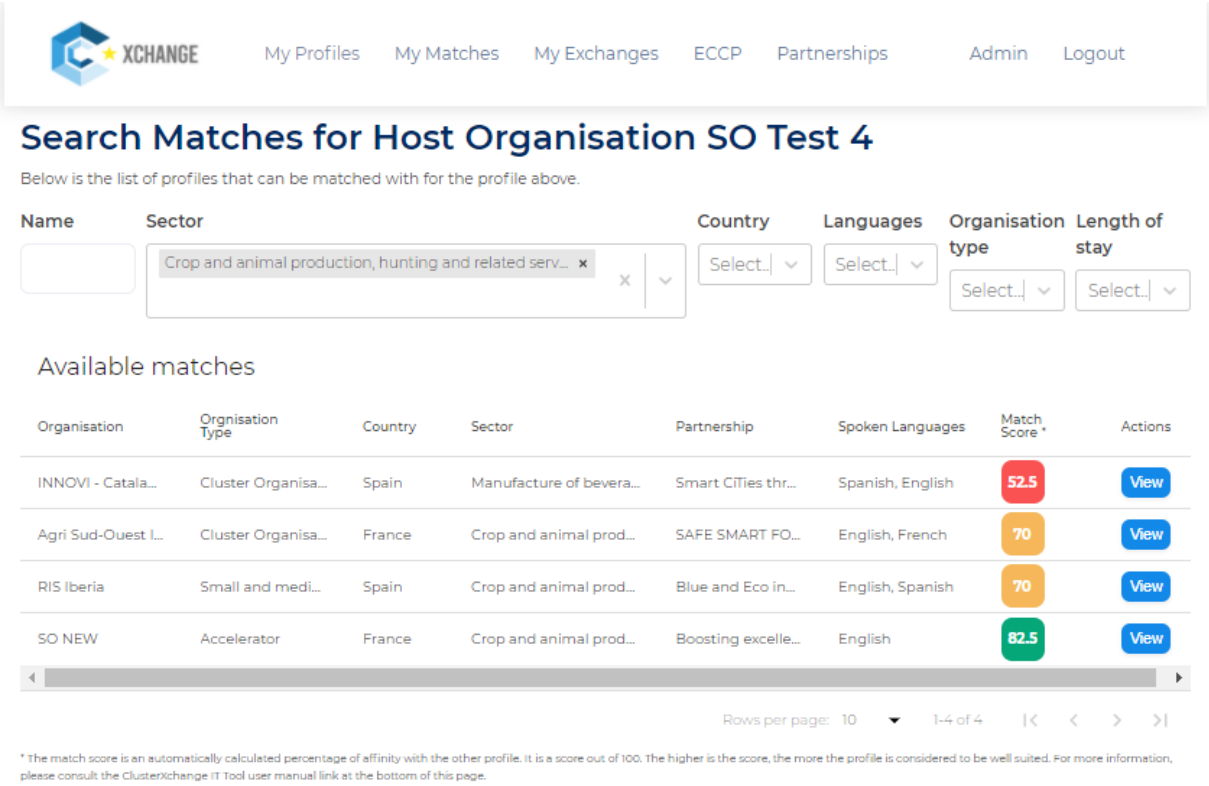

Figure 48: List of available organisations as counterparts for matching

4.1.3 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 49),

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.

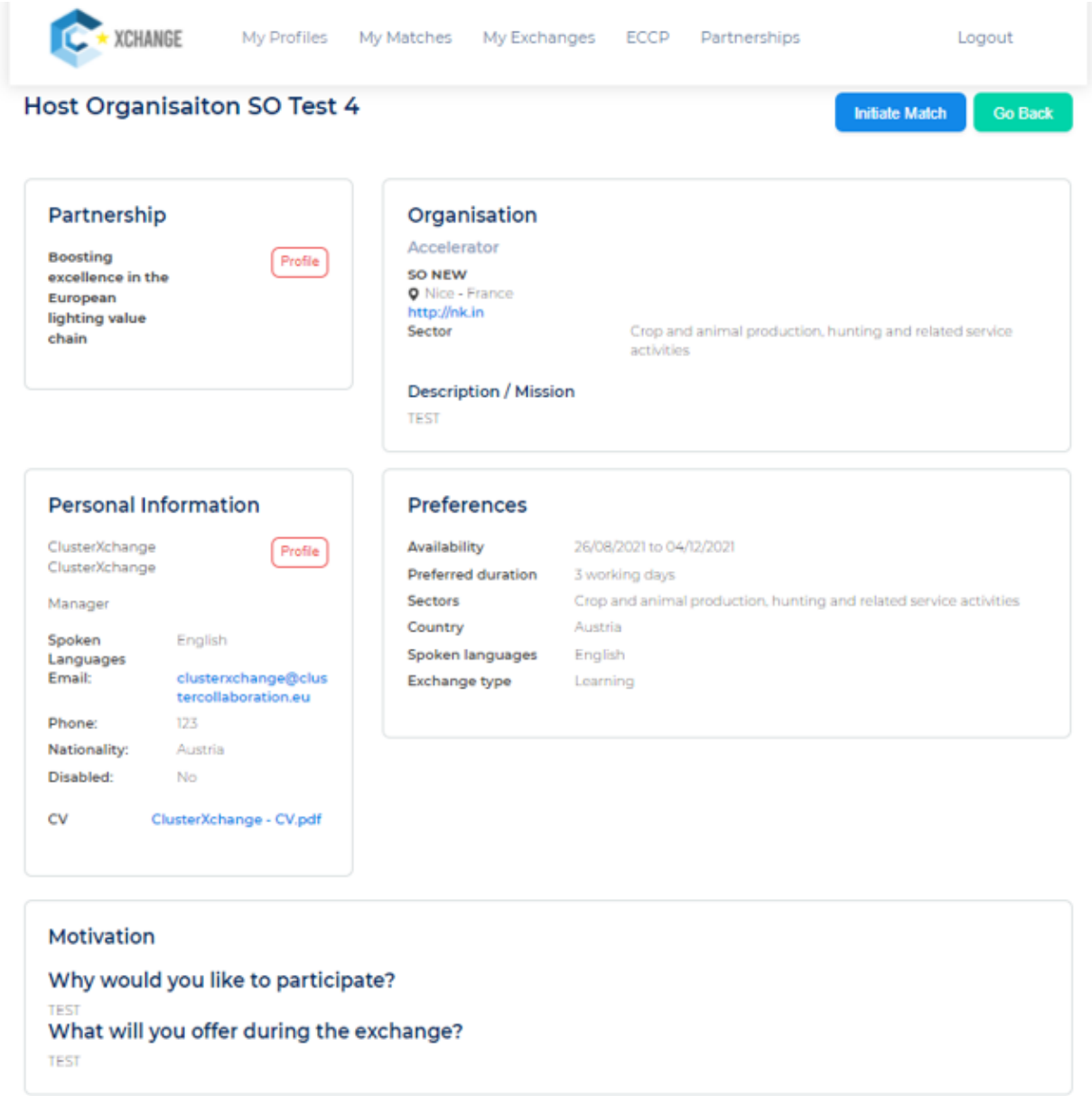

Figure 49: VO initiating a match with an HO

After clicking the 'Initiate Match' button in the previous step, a validation screen (Figure 50) appears that provides a synopsis of the match. In this page you have various options. You can accept the match by clicking the 'Validate Match' button. In this case, the match gets validated by you, the initiator. You also have the option to reject the match by clicking the 'Reject Match' button.

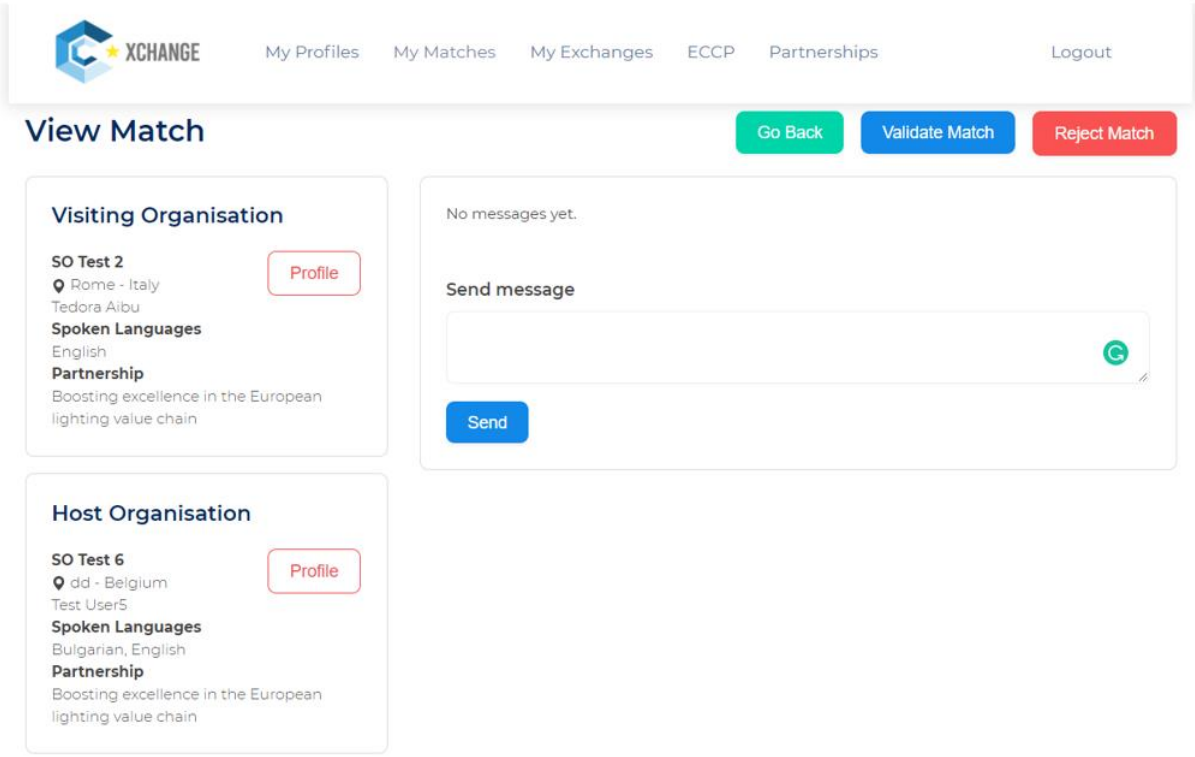

Figure 50: Initial validation of a match by the VO

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 automatically 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 'Reject Match' button, the counterpart profile owner will receive an email notification about the rejection of the match.

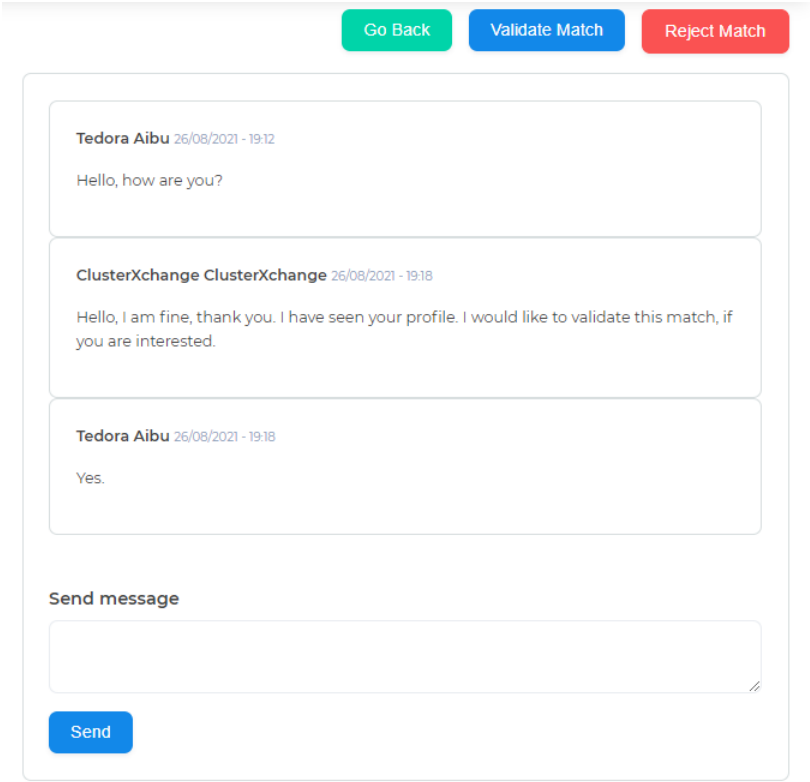

Figure 51: Chat facility enabled by the IT Tool

Figure 51 shows that before validating or rejecting 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 validate the match will trigger the closing of all the other initiated matches for the VO.

4.2. Exchange Building

The exchange building process involves the preparation and validation of physical exchanges (visits). Figure 52 shows the process.

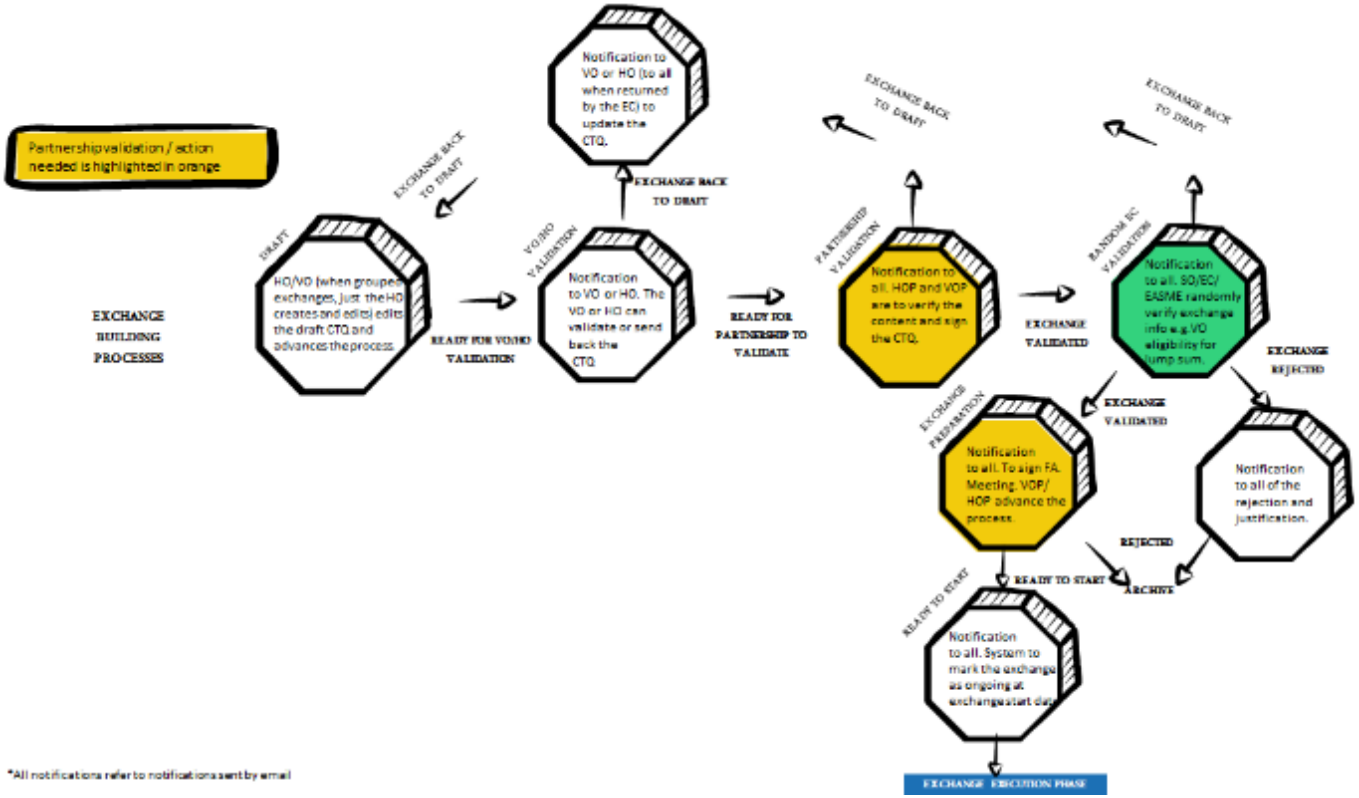

Figure 52: Overview of the process involved in the Exchange Building phase

4.2.1 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 53. Each exchange carries a unique reference number (EG546TA2, in this case).

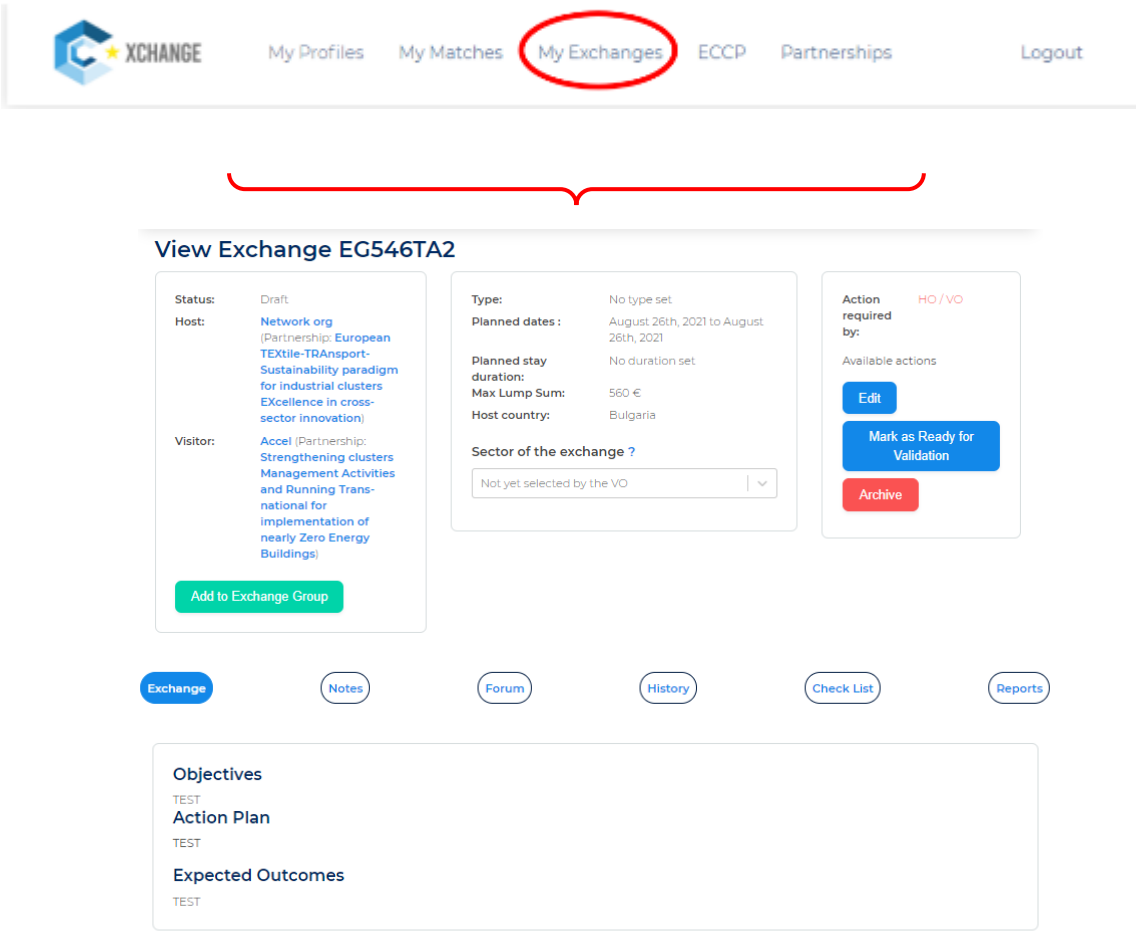

Figure 53: Overview of an exchange detail

The top-left-hand box shows the status of the exchange and the participants and their respective Partnerships. The top-middle box displays the exchange type, dates, duration of stay, sector of exchange[28] and the maximum lump sum of the financial assistance the VO is eligible to receive as a reimbursement based on the amount allocated per Host country (See Annex 1 – Maximum lump sums paid to the VOs). The lump sum is not visible if the VO is a beneficiary of the Partnership (VOP)[29]. The

[28] The sector of exchange is indicated once the action plan for the exchange has been defined and both, the HO and VO agree within which sector the subject of their exchange activities fall. The sector of exchange would only need to be selected once per exchange. In a Group Exchange, the HO is responsible to ensure the sector of exchange is selected correctly for each individual exchange detail.

[29] The European Cluster Partnerships | Excellence partners participating in an exchange are not allowed to claim the lump sum foreseen for VOs. In case beneficiaries (of call for proposals European Cluster Excellence Programme - COS-CLUSTER-2018-03-02) themselves take part in ClusterXchange as VOs, beneficiaries should comply with their travel policies or usual practices and the incurred travel costs should be reported under 'other direct costs' (travel). All the

maximum lump sum is automatically displayed by the IT Tool based on the indicated exchange characteristics. The top-right-hand 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 font colour of the labels indicate which party needs to act (Red colour for pending actions and Green colour for completed actions).

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 and validated by the HO and VO(s)) after the match is made. Please note that the information encoded in these sections will be retrieved and transferred, or generated 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 finalisation. The Exchange Forum is available for bilateral communication between the exchange participants and multilateral communication with 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 SO/EC, 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.

4.2.2 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 'Actions required by' section of the exchange view (Figure 54). The Commitment to Quality is developed through the form accessed by clicking on the edit button on the top-righthand box only when the exchange is in 'Draft' status. It is the responsibility of the HO and VO to develop and crosscheck 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[30]:

Partnerships' partners must be registered under their own Partnership on the CXC IT Tool and sign the Commitment(s) to Quality to make sure that the exchange is funded by their Partnership´s budget.

[30] The Commitment to Quality should contain all the details of an exchange. The HO and VO, with the help of their Partnerships should should closely consider the following points: 1) Objectives: Define and outline the overall and specific objectives for the exchange. You can include the individual objectives of the HO and VOs and related indicators (if there are any and in bullet points, if needed). The details need to be as specific as possible with examples of expected results and outcomes per objective. 2) Action plan: Describe the actions of the HO in detail, focusing on how the HO will engage with the VO(s) and participate in delivering the action plan, e.g., facilitate and moderate the exchange, interact with the VOs,

- 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. The HO is also in charge of creating an Exchange Group on the IT Tool by clicking the 'Add to Exchange Group' (Figure 54).

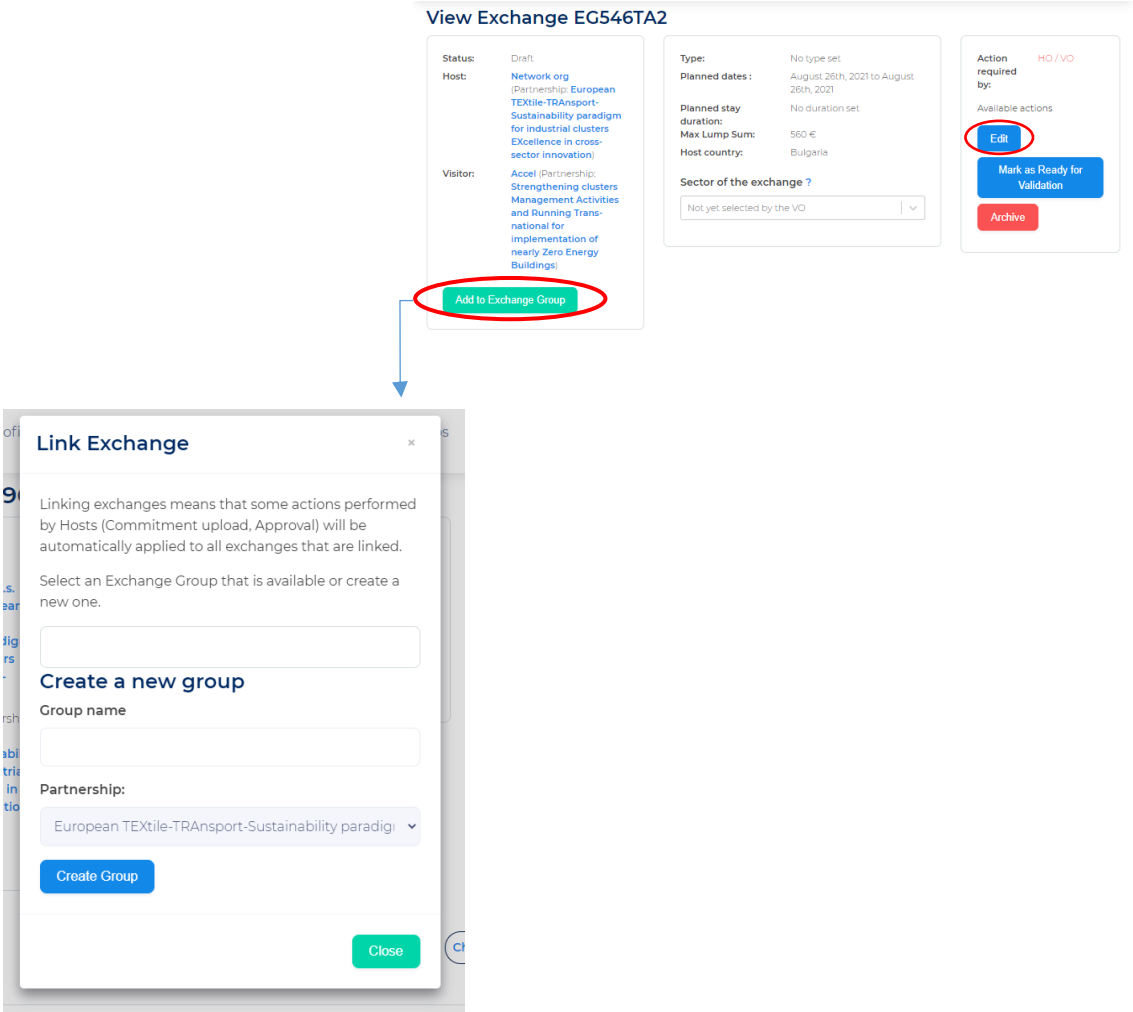

Figure 54: Draft status of an exchange and creating an Exchange Group

conduct training or other sessions, foster communication and knowledge/skill-transfer, support the realization of each or some of the specific objectives for the VOs, etc. Describe the actions of the VOs (overall) and include the agenda for each day of the exchange (separately for each day), including the hour of start and ending for each session and the content, location and speakers/facilitators/presenters of each session (where available/possible). Also show/include the time for breakfast, coffee and lunch breaks, as well as the check-in and -out time in the agenda (where possible). The agenda for each day normally needs to have a minimum of 8 working hours (or what is considered a normal working day of the host organisation) to count as a full day of exchange. Please ensure the agenda for each day is not an exact copy of the other but show diversity that demonstrate each of the objectives were covered. 3) Expected outcomes: Briefly list concrete and intangible impact and outcomes expected, in relation of the objectives.

The IT Tool allows to Add/Remove exchanges to/from a group. In order to create an exchange group, all the exchanges to be clustered **must to be in a 'draft' status**. The HO can create the group by first opening the first exchange detail and clicking on the 'Add to Exchange Group' button. Once the exchange group has been created, the remaining exchanges can be added to the group using the same method (Open new exchanges details, click on the 'Add to Exchange Group' and add the new exchanges to the existing 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 validated by each of the participants (HO and VOs). When the Commitment to Quality contents is complete, either the VO or HO can send it for validation to the counterpart – VO/HO by clicking 'Mark as Ready for Validation'. In case of an Exchange Group, the HO clicks this button and the action will be applied to all exchanges in the group.

4.2.3 STEP 3 – Validate the exchange by the VO/HO (Ready for Validation status)

The exchange gets to this status from the 'Mark as Ready for Validation' 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 validate the Commitment to Quality; 2) Send the Commitment to Quality Back to draft

1) Sign and Validate 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 Validate it by clicking the ' Validate' action button to move to the next status. For grouped exchanges, the exchanges will have to be validated by all the VOs so to move to the next status. It is possible to remove an exchange from a group along the way, **but this action is not reversible**. An exchange can be added, although only when 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 that is generated in a PDF format by the IT Tool. Below are two possible ways to do the same.

- Signature in one step
  - It is possible to download the document, introduce the scanned or digital signatures of both participants, and upload to the IT Tool a fully signed pdf Commitment to Quality document.
  - If no scanned or digital 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 or digital 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 55 shows a preview of the message.

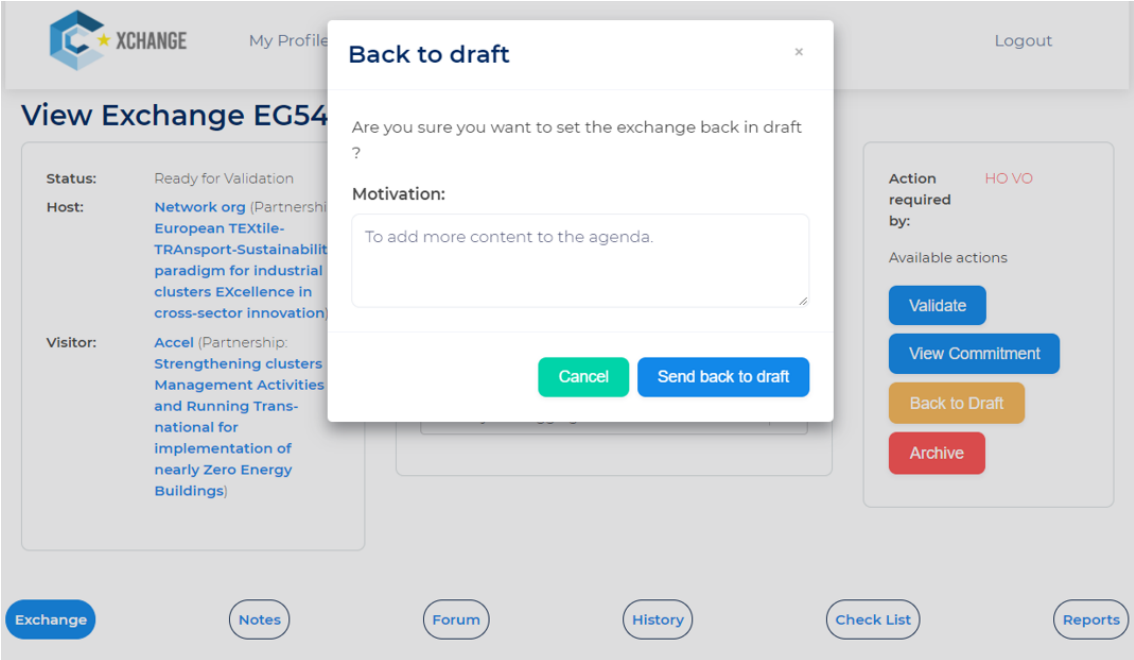

Figure 55: Sending the exchange back to draft

How to sign the Commitment to Quality and Financial Agreement

The Commitment to Quality and Financial Agreement can contain handwritten and/or electronic signatures. The following rules apply to the signature of these documents.

<u>The documents containing only electronic signatures:</u>
Only the qualified electronic signature (QES) within the meaning of Regulation (EU) No 910/2014 (eIDAS Regulation) is accepted. Documents signed with a QES benefit from the highest level of security and legal certainty under the eIDAS Regulation. A qualified electronic signature is an advanced electronic signature which is additionally:

- created by a qualified signature creation device (QSCD);
- and is based on a qualified certificate for electronic signatures.

How to create a Qualified electronic signature?

1. Obtain a digital certificate from a Trust Service Provider (TSP)

- European Union Trusted List: https://webgate.ec.europa.eu/tl-browser/#/ can be consulted to find trusted providers of qualified certificates and the private key related to the certificate which will be usually stored by providers on a 'qualified electronic signature creation device' (QSCD). To make sure that the QES used is compliant to eIDAS Regulation, the Partnerships need to check that both the service provider and the qualified certificate generation service used are included in the EU Trusted List Browser.

2. Using Trusted List Browser, go to "Search by Type of service" (top left of the screen). Select "Qualified certificate for electronic signature" and click "Next". Then, select any country you may found appropriate and click "Search". You will then see the list with all available Trusted Providers in your country which you can contact.
3. An electronic signature is issued for a physical person associated with a business and the provider may ask you to provide evidence for this during the process. Once you have a qualified certificate for electronic signature, you will be able to sign documents. It is recommended that Partnerships check the signatures and the validity of their certificate with the following tool:
   - The DSS Demonstration validation tool available at https://ec.europa.eu/cefdigital/DSS/webapp-demo/validation can help check the validity of a certificate by indicating the number and type of valid signatures in a document.

   Please note that TSPs might offer their own step-by-step process for signing digitally.
4. More background information can be found here: https://ec.europa.eu/cefdigital/wiki/display/CEFDIGITAL/eSignature
   If you have a specific question you can also contact the CEF Digital Help Desk.

If all electronic signatures are valid, then the signed document is valid too.

The documents containing only hand-written (BLUE INK) signatures:
The document must be signed in BLUE INK in original, which is a hand-written signature, and should be sent by post to the Partnerships that is collecting it. In this case, an advanced scanned pdf copy is sufficient to initiate the virtual exchange, but it does not replace, in anyway, the posting procedure.

The document contains both electronic and paper (blue ink) signatures(hybrid):

This is possible but please bear in mind the electronic signature validity rules above. For posting the printed copies, the document has to be signed first electronically by all parties who can sign electronically, then the first party who signs with blue ink, prints out in as many copies as there are parties signing, signs and sends to the next paper signature party. The last one that signs on paper sign one original to all other signatories. Please note that we are still clarifying this last point of sending CTQs by post with the EC services, nevertheless we have included this as well here.

4.2.4 STEP 4 – Validate the exchange by the Partnership(s) (Partnership validation 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 'Validate' 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 actions 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 go back to Draft

status (explained before in the same section). The HO and VO will have to modify, sign again and activate the 'Validate' 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 validate it to move to the next status (See signature guidelines in Section 4.2 – STEP 3).

4.2.5 STEP 5 – Validate the exchange by the SO/EC/EISMEA (SO/EC/ EISMEA Validation 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 validated the exchange and the exchange **is randomly selected** for a check by the EC services and the CXC SO (Figure 56).

Figure 56: Validation by the SO/EC/EISMEA

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. The exchange will go back to Draft status (explained before in Section 4.2 – STEP 2). The HO and VO will have to modify, sign again and activate the 'Validate' action button so that the Commitment to Quality is returned to the HOP and VOP for their signature and validation.
2. The exchange can be validated 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.

4.2.6 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 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 (Figure 57). 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 and signature guidelines in Section 4.2 – STEP 3 should be applied.

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 in the country of the HO.

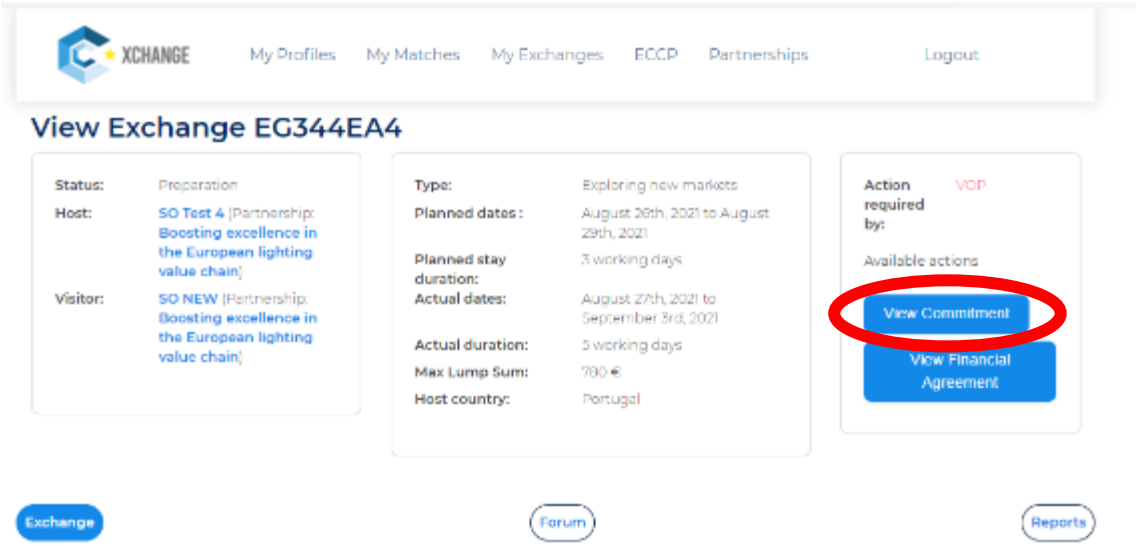

Figure 57: Exchange in the preparation status

NOTE: In this status, the VOP and HOP can set the actual dates of the exchange on the IT Tool (corresponding to that is agreed on the Commitment to Quality and Financial Agreement) and mark the exchange as ready to start or archive the exchange, if it is decided that the exchange does not move ahead.

4.2.7 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 finalisation phase further below - Figure 60). Any other alterations to the exchange (e.g., date change, modifications to the agenda on the Commitment to Quality), should also be indicated in the Final Activity Report feedback form (please see the Exchange finalisation phase further below).

4.3. Exchange Finalisation

The exchange finalisation process refers to the phase which involves the commencement and execution of physical exchanges (visits). **Error! Reference source not found.** below shows the exchange finalisation process.

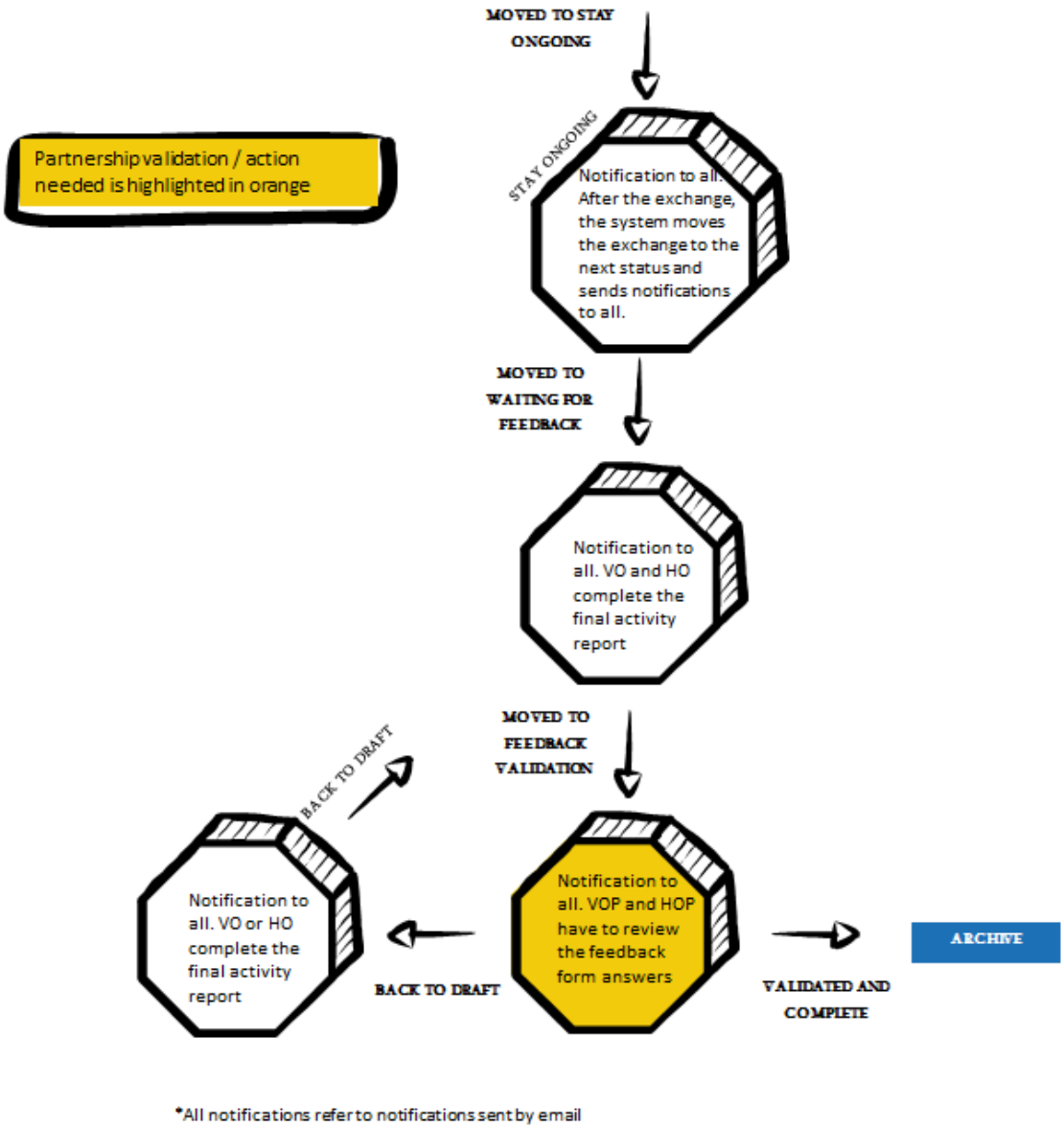

Figure 58: Overview of the process involved in the Exchange Finalisation phase

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

4.3.1 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.

4.3.2 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 Edit' reports button. In Figure 59 you can see a preview of this.

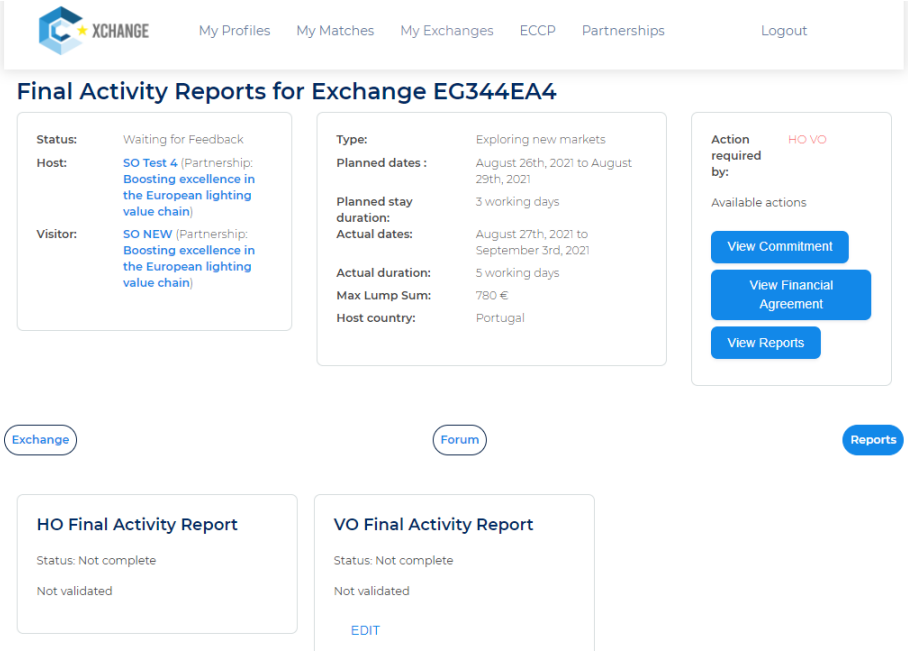

Figure 59: Reporting after the exchange

The feedback report is filled in online, in a form on the IT Tool. After completing the feedback report, you will have the opportunity to review/edit the data entered by clicking the 'Edit Report' in a review screen and submit the report for validation by the Partnership(s) by clicking the 'Submit for Validation' as shown in Figure 61.

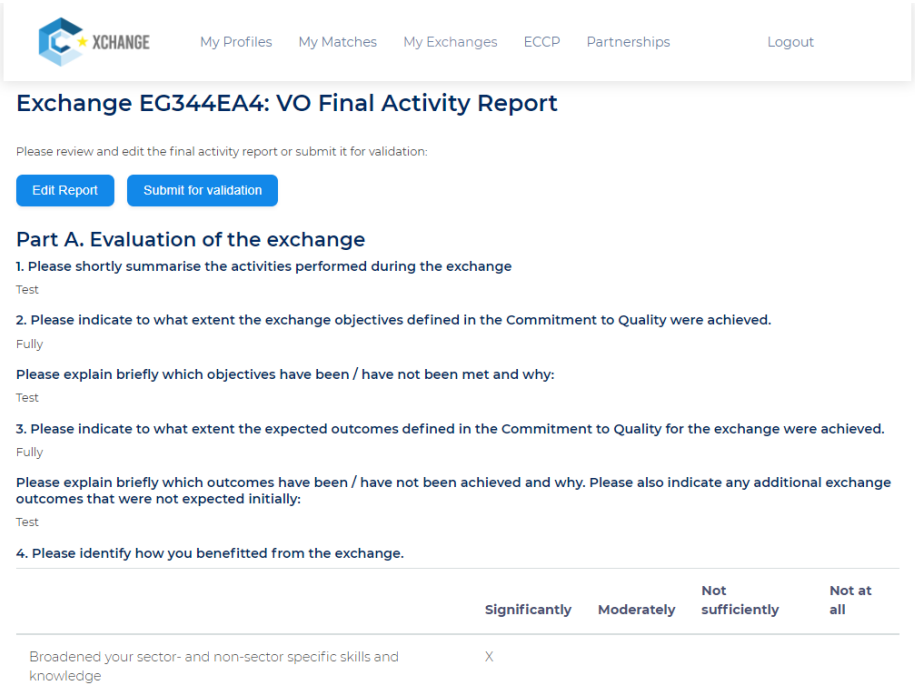

Figure 60: Submitting a Final Activity Report for validation by the Partnerships

After the VO and HO submit their respective feedback reports (Final Activity Reports) to their respective Partnership(s), the process goes into the feedback validation phase. Once submitted, the report can be viewed by the VO or HO (Figure 60). However, to make changed in the report after submission, the Partnerships have to be contacted in order to send the reports back to draft for changes.

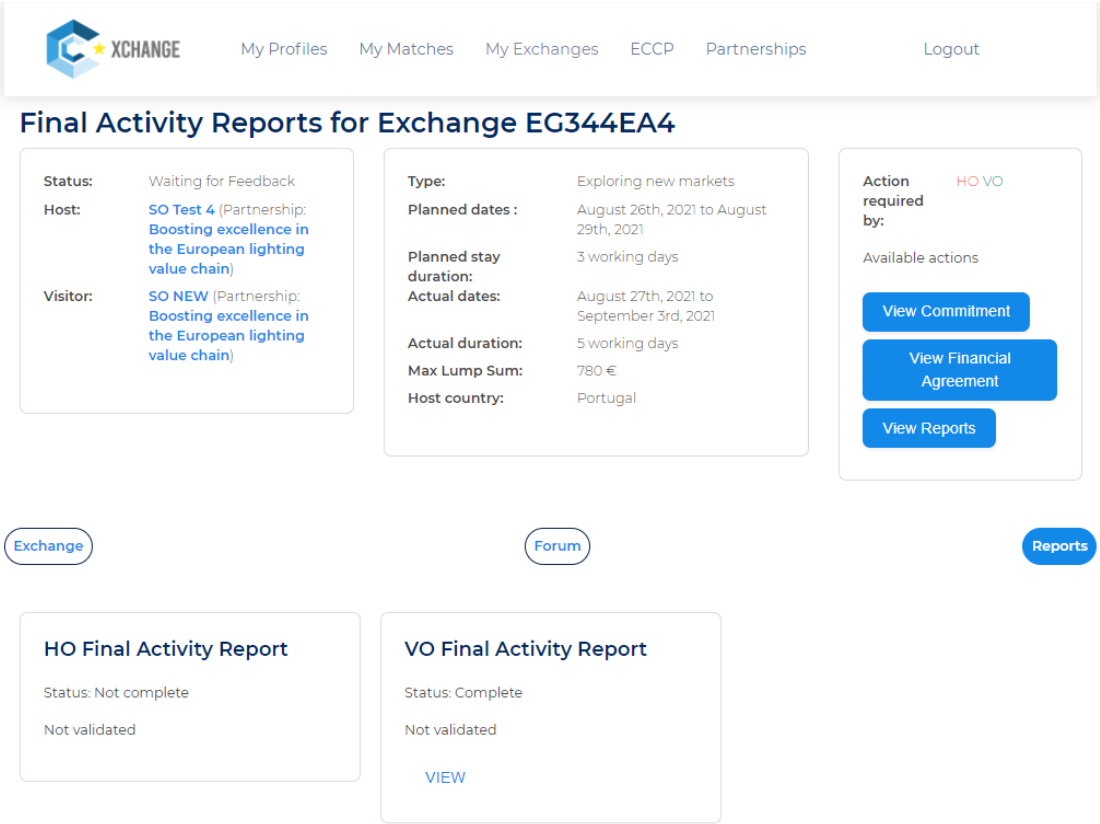

Figure 61: VO submitted the Final Activity Report

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

After the VO and HO submit their respective feedback reports, the respective 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 it again for validation by their Partnership(s). If they consider the feedback reports complete, the HOP and VOP can also validate the reports. Only the final validated reports are considered validated 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 (See Annex 5 – Template of the Financial Agreement for specific details about the lump sum provision).

05

Annexes

5. Annexes

Annex 1 – Maximum 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[31]	560
Latvia	610
Lithuania	560
Luxembourg	830
Malta	720
Moldova	530
Montenegro	560
Netherlands	830
Poland	610
Portugal	780
Romania	560
Serbia	560
Slovakia	610

[31] 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.

Monthly Financial Assistance (Lump sum) paid by the Partnership(s) to VOs	
Country of stay (Host country)	**Amount per month (€)**
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)[32] and Overseas Countries and Territories (referred to in Article 198 TFEU)[33]	1100
Visitors with disabilities (regardless of the country of stay)	1100

[32] http://ec.europa.eu/regional_policy/en/policy/themes/outermost-regions/
[33] http://ec.europa.eu/europeaid/regions/octs_en

Annex 2 – List of COSME countries

Albania Armenia Austria Belgium Bosnia and Herzegovina Bulgaria Croatia Cyprus Czechia Denmark Germany Estonia Finland North Macedonia France Greece Hungary Iceland Ireland Italy Kosovo Latvia	Lithuania Luxembourg Malta Moldova Montenegro Netherlands Poland Portugal Romania Serbia Slovakia Slovenia Spain Sweden Turkey Ukraine United Kingdom Outermost Regions of the EU (referred to in Article 349 TFEU)[34] Overseas Countries and Territories (referred to in Article 198 TFEU)[35]

[34] http://ec.europa.eu/regional_policy/en/policy/themes/outermost-regions/
[35] 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.

$$((Score\_1 \times Weight\_1) + \ldots + (Score\_N \times Weight\_N)) / SUM$$

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[36] :	

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[37]:	

Summary of the proposed exchange

Type of the exchange:	☐ Capacity building ☐ Research, development and innovation ☐ Mentoring ☐ Learning ☐ Exploring new markets ☐ Common project research ☐ Networking and Events ☐ Group event ☐ Other: Click or tap here to enter text.

[36] European Strategic Cluster Partnership for Excellence in charge of the Visiting Organisation
[37] European Strategic Cluster Partnership for Excellence in charge of the Host Organisation

Duration of the exchange (in working days):	
Planned start date:	
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 and agenda

Please outline the detailed action plan (implementation steps) and agenda 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.).
- 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.
- 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 s 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.
- 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

the Visiting Organisation's European Cluster Partnership | Excellence:

1. Partnership's name:
2. Organisation's name:
3. Name of the authorised representative:
4. Organisation´s address:
5. Phone:
6. Email:

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

AND

the Visiting Organisation:

1. Organisation's name:
2. Name of the authorised representative:
3. Organisation´s address:
4. Phone:
5. Email:

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

Context

The European Cluster Partnerships | Excellence (Partnerships) 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 Partnerships, is a new pilot scheme for 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 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

1.1. This agreement shall enter into force on the date when the last of the two parties signs it.[38]

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 European Innovation Council and Small and Medium-sized Enterprises Executive Agency (EISMEA) 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 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.

[38] It is recommended that the VOP signs last.

Article 3 – Early completion of the exchange

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 EISMEA.

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:

- 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 Partnership of the HO (HOP)). 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]	Done at [Place], [Date]
Signature of the VOP's authorised representative	Signature of the VO´s authorised representative

Annex 6 – Template of the Final Activity Report for HO

Details of the 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[39]:	
Exchange dates:	

Your responses to this questionnaire will help us improve ClusterXchange and better adapt it to the host organisations´ needs.

Please note that the questionnaire has two parts:

1. **Part A collects your feedback about the exchange.**
2. **Part B collects your feedback about ClusterXchange. This part is not visible to the HOP.**

Please note that none of your responses are visible to the VO(s) that participated in the exchange.

Part A. Evaluation of the exchange

1. **Please shortly summarise:**

   a) the activities performed during the exchange[40]

   Click or tap here to enter text.

   b) Deviations from the planned activities (if any)

   Click or tap here to enter text.

2. **Please indicate to what extent the exchange objectives defined in the Commitment to Quality were achieved.**

[39] European Cluster Partnerships | Excellence in charge of the Host Organisation
[40] Include the agenda from Commitment to Quality

☐ Fully ☐ To some extent ☐ Not sufficiently

☐ Not at all

Please explain briefly which objectives have been / have not been met and why:

Click or tap here to enter text.

3. Please indicate to what extent the expected outcomes defined in the Commitment to Quality for the exchange were achieved.

☐ Fully ☐ To some extent ☐ Not sufficiently

☐ Not at all

Please explain briefly which outcomes have been / have not been achieved and why. Please also indicate any additional exchange outcomes that were not expected initially:

Click or tap here to enter text.

4. Please identify how you benefitted from your participation in the exchange.

	Significantly	Moderately	Not sufficiently	Not at all
Increased the visibility of your organisation, services and products in relevant communities	☐	☐	☐	☐
Shared your knowledge, experience and information in specific areas	☐	☐	☐	☐
Learned new skills and knowledge from your visitor(s)	☐	☐	☐	☐
Expanded your network of contacts	☐	☐	☐	☐
Developed new cross-border partnerships	☐	☐	☐	☐
Gained knowledge on visitor(s)´ foreign market(s)	☐	☐	☐	☐
Developed business collaboration(s)	☐	☐	☐	☐
Other (optional): Click or tap here to enter text.	☐	☐	☐	☐
Other (optional): Click or tap here to enter text.	☐	☐	☐	☐
Other (optional): Click or tap here to enter text.	☐	☐	☐	☐

Please include any comments.

Click or tap here to enter text.

5. Assessment of choice for hosting the exchange

a. How relevant were the following factors when deciding to host the exchange?

	Very relevant	Quite relevant	Moderately relevant	Irrelevant
Countr(ies) of origin of the visitor(s)	☐	☐	☐	☐
Visitor(s)´ sector(s) of activity	☐	☐	☐	☐
Visitor(s)´ organisation type(s) / business activities	☐	☐	☐	☐
Visitor(s)´ knowledge and experience	☐	☐	☐	☐
Command of the language used communicate with the visitor(s)	☐	☐	☐	☐

Other (optional) Click or tap here to enter text.

b. How well were these expectations met during your actual stay?

	Very well	well	Moderately	Not at all
Countr(ies) of origin of the visitor(s)	☐	☐	☐	☐
Visitor(s)´ sector(s) of activity	☐	☐	☐	☐
Visitor(s)´ organisation type(s) / business activities	☐	☐	☐	☐
Visitor(s)´ knowledge and experience	☐	☐	☐	☐
Command of the language used communicate with the visitor(s)	☐	☐	☐	☐

Other (optional) Click or tap here to enter text.

6. Please evaluate the duration of the exchange.

☐ Too long ☐ Optimal ☐ Too short

7. Please indicate your satisfaction with the exchange.

☐ Very satisfied ☐ Satisfied ☐ Not satisfied ☐ Not at all satisfied

8. Share your success story! (optional)

Click or tap here to enter text.

Part B. Evaluation of ClusterXchange

9. How well did the exchange go?

a) Did you encounter any problems during the exchange?

☐ Yes ☐ No

Please explain (optional*)* Click or tap here to enter text.

b) If yes, were you able to overcome these problems?

☐ Totally ☐ Mostly ☐ Not really ☐ Not at all

Please explain (optional*)*Click or tap here to enter text.

10. Please rate the services offered to you in the framework of ClusterXchange.

	Very good	Good	Average	Poor
Promotion of ClusterXchange	☐	☐	☐	☐
Documentation available on the website	☐	☐	☐	☐
ClusterXchange IT tool (registration)	☐	☐	☐	☐
ClusterXchange IT tool (database of searching for potential visitors)	☐	☐	☐	☐
ClusterXchange IT tool (exchange realisation)	☐	☐	☐	☐

Other (optional) Click or tap here to enter text.

11. Please rate the support provided by your Partnership.

	Very good	Good	Average	Poor
Clarification of questions and doubts	☐	☐	☐	☐
Assistance to search for potential visitors	☐	☐	☐	☐
Support to establishing the Commitment to Quality (objectives, action plan, agenda, expected outcomes)	☐	☐	☐	☐
Preparatory activities organised before the exchange(administration, etc)	☐	☐	☐	☐
Support in case of difficulties with the visitor(s)	☐	☐	☐	☐

Other (optional) Click or tap here to enter text.

12. Please indicate your overall satisfaction with ClusterXchange

☐ Very satisfied ☐ Satisfied ☐ Not satisfied

☐ Not at all satisfied

If you are "not satisfied" or "not satisfied at all", could you please provide what is the reason for it? Which difficulties did you encounter and what are your suggestions for improvement (optional)?

Click or tap here to enter text.

13. What would you suggest to improve in ClusterXchange?

	Very important	Important	Useful	Not a problem
Broader scope of ClusterXchange (objectives and types of activities covered)	☐	☐	☐	☐
More types of organisations allowed to participate	☐	☐	☐	☐
Simpler administrative procedure	☐	☐	☐	☐
Financial assistance to hosts	☐	☐	☐	☐

Other (optional) Click or tap here to enter text.

14. Please share with us any additional comments (optional).

Click or tap here to enter text.

Please note that all former exchange participants will automatically become ClusterXchange Alumni Network members. In case you would not like to participate, please opt-out below.

☐ I would not like to become part of the ClusterXchange Alumni Network.

Thank you for your feedback!

Annex 7 – Template of the Final Activity Report for VO

Details of the 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:	
VOP[41]:	
Exchange dates:	

Your responses to this questionnaire will help us improve ClusterXchange and better adapt it to the visiting organisations´ needs.

Please note that the questionnaire has two parts:

3. **Part A collects your feedback about the exchange.**
4. **Part B collects your feedback about ClusterXchange. This part is not visible to the VOP.**

Please note that none of your responses are visible to the organisation that hosted your exchange.

Part A. Evaluation of the exchange

1. **Please shortly summarise**

b) the activities performed during the exchange[42]

Click or tap here to enter text.

b) Deviations from the planned activities (if any)

Click or tap here to enter text.

2. **Please indicate to what extent the exchange objectives defined in the Commitment to Quality were achieved.**

[41] European Cluster Partnerships | Excellence in charge of the Visiting Organisation
[42] Include the agenda from Commitment to Quality

☐ Fully ☐ To some extent ☐ Not sufficiently

☐ Not at all

Please explain briefly which objectives have been / have not been met and why:

Click or tap here to enter text.

3. Please indicate to what extent the expected outcomes defined in the Commitment to Quality for the exchange were achieved.

☐ Fully ☐ To some extent ☐ Not sufficiently

☐ Not at all

Please explain briefly which outcomes have been / have not been achieved and why. Please also indicate any additional exchange outcomes that were not expected initially:

Click or tap here to enter text.

4. Please identify how you benefitted from your participation in the exchange.

	Significantly	Moderately	Not sufficiently	Not at all
Broadened your sector- and non-sector specific skills and knowledge	☐	☐	☐	☐
Gained insights into the operation and techniques used by your host	☐	☐	☐	☐
Expanded your network of contacts	☐	☐	☐	☐
Developed new cross-border partnerships	☐	☐	☐	☐
Found innovative solutions to upgrade your business, products and services	☐	☐	☐	☐
Created new business opportunities	☐	☐	☐	☐
Got involved in new innovative projects	☐	☐	☐	☐
Gained knowledge on foreign markets and cultures	☐	☐	☐	☐
Other (optional): Click or tap here to enter text.	☐	☐	☐	☐
Other (optional): Click or tap here to enter text.	☐	☐	☐	☐
Other (optional): Click or tap here to enter text.	☐	☐	☐	☐

Please include any comments.

Click or tap here to enter text.

5. Assessment of choice for the stay abroad

c. How relevant were the following factors for your and your organisation´s professional development?

	Very relevant	Quite relevant	Moderately relevant	Irrelevant
Country of your stay)	☐	☐	☐	☐
Host´s sector of activity	☐	☐	☐	☐
Host´s organisation type / business activities	☐	☐	☐	☐
Host´s knowledge and experience	☐	☐	☐	☐
Command of the language used communicate with the host	☐	☐	☐	☐

Other (optional) Click or tap here to enter text.

d. How well were these expectations met during your actual stay?

	Very relevant	Quite relevant	Moderately relevant	Irrelevant
Country of your stay)	☐	☐	☐	☐
Host´s sector of activity	☐	☐	☐	☐
Host´s organisation type / business activities	☐	☐	☐	☐
Host´s knowledge and experience	☐	☐	☐	☐
Command of the language used communicate with the host	☐	☐	☐	☐

Other (optional) Click or tap here to enter text.

6. Please evaluate the duration of the stay.

☐ Too long ☐ Optimal ☐ Too short

7. Please indicate your satisfaction with the exchange.

☐ Very satisfied ☐ Satisfied ☐ Not satisfied ☐ Not at all satisfied

8. Share your success story! (optional)

Click or tap here to enter text.

Part B. Evaluation of ClusterXchange

9. How well did your stay go?

a) Did you encounter any problems during your stay abroad?

☐ Yes ☐ No

Please explain (optional*)* Click or tap here to enter text.

b) If yes, were you able to overcome these problems?

☐ Totally ☐ Mostly ☐ Not really ☐ Not at all

Please explain (optional*)*Click or tap here to enter text.

10. Please rate the services offered to you in the framework of ClusterXchange.

	Very good	Good	Average	Poor
Promotion of ClusterXchange	☐	☐	☐	☐
Documentation available on the website	☐	☐	☐	☐
ClusterXchange IT tool (registration)	☐	☐	☐	☐
ClusterXchange IT tool (database of searching for potential hosts)	☐	☐	☐	☐
ClusterXchange IT Tool (exchange realisation)	☐	☐	☐	☐

Other (optional) Click or tap here to enter text.

11. Please rate the support provided by your Partnership

	Very good	Good	Average	Poor
Clarification of questions and doubts	☐	☐	☐	☐
Assistance to search for potential hosts	☐	☐	☐	☐

Support to establishing the Commitment to Quality (objectives, action plan, agenda, expected outcomes)	☐	☐	☐	☐
Preparatory activities organised before the stay (administration, logistics, pre-departure information)	☐	☐	☐	☐

Other (optional) Click or tap here to enter text.

12. Please rate the support provided by the Host´s Partnership during your stay.

	Very important	Important	Useful	Not a problem
Assistance at arrival (accommodation, transport, compliance with national regulations, etc...)	☐	☐	☐	☐
Availability / information during the stay	☐	☐	☐	☐
Support in case of difficulties with the host	☐	☐	☐	☐

Other (optional) Click or tap here to enter text.

13. How do you evaluate the financial assistance provided by ClusterXchange?

☐ Sufficient ☐ More or less enough ☐ Not sufficient

14. Please indicate your overall satisfaction with ClusterXchange.

☐ Very satisfied ☐ Satisfied ☐ Not satisfied

☐ Not at all satisfied

If you are “not satisfied” or “not satisfied at all”, could you please provide what is the reason for it? Which difficulties did you encounter and what are your suggestions for improvement (optional)?

Click or tap here to enter text.

15. What would you suggest to improve in **ClusterXchange?**

	Very important	Important	Useful	Not a problem
Broader scope of ClusterXchange (objectives and types of activities covered)	☐	☐	☐	☐
More types of organisations allowed to participate	☐	☐	☐	☐
Simpler administrative procedure	☐	☐	☐	☐
Increased amount of financial assistance	☐	☐	☐	☐

Other (optional) Click or tap here to enter text.

16. Please share with us any additional comments (optional).

Click or tap here to enter text.

Please note that all former exchange participants will automatically become ClusterXchange Alumni Network members. In case you would not like to participate, please opt-out below.

☐ I would not like to become part of the ClusterXchange Alumni Network.

Thank you for your feedback!