22.11.2016

Call for tenders:
"Training of TCE Cluster Managers 2017"

Background and introduction

Within the framework of the *TCE – Towards Cluster Excellence* project, 4 clusters working in the energy technology and forest industry sectors improve and strengthen their cluster management practices aiming for cluster excellency and provision of top quality business services to the SMEs involved in the clusters. The 4 clusters are:

- Oy Merinova Ab (EnergyVaasa, Finland)
- CEPV (Spain)
- EnergyIn (Portugal)
- Paper Province (Sweden).

TCE is financed within the COSME Cluster Excellence Programme (COS-CLUSTER-2014-3-04-02-1) launched by the Executive Agency for Small and Medium-sized Enterprises (EASME). COSME is the EU programme for the Competitiveness of Enterprises and Small and Medium-sized Enterprises (SMEs). The objective of the Clusters Excellence Programme is to strengthen cluster management to provide more professional business services to European SMEs and, as a result, to contribute to the development of more world-class clusters in the EU.

The objectives of the project are achieved, among other things, through benchmarking of the current cluster management practices, identification of gaps for improvement and necessary training needs, followed by specific training of cluster managers in the identified priority areas. This call for tenders concerns the specific training for the cluster managers.

In this Call for Tenders, organisations providing relevant training in the selected areas are asked to submit bids for provision of the training.

The training will be implemented for a maximum of two persons per participating cluster during the period January – March 2017 for a maximum of 8 persons for the consortium.

A report on the lessons learned, how to implement these in the clusters, and recommendations on how to improve the training modules implemented will be prepared by the participating clusters.

More information on the TCE project is found on the links below:

https://ec.europa.eu/easme/en/towards-cluster-excellency
https://towardsclusterexcellencyblog.files.wordpress.com/2016/03/tce-brochure.pdf

Content and size of the assignment

Training needs

After the benchmarking exercise of the four clusters by European Secretariat for Cluster Analysis (ESCA) experts, the following training needs were defined. A subcontractor will be contracted to facilitate and implement training of the cluster managers in the following identified priority fields;

Cluster Management

- Strategy and governance
- Stakeholders identification and engagement: Segmentation, CRM-systems, feedback surveys, cluster mapping and engagement of cluster companies
- Cluster management IT tools for increased efficiency
- Human resources; availability, stability, development, life-long learning, how to get sufficient international work experience for the team

Services provided and activities

- Development of a broader range of tailor-made services on technology transfer and collaborative R&D activities, also without third party funding, for example working with specific technology or working groups
- Development of export promotion initiatives services for internationalisation – especially for SMEs - including development of international matchmaking services between cluster participants, foreign companies, research institutions and universities.
- Support to Cluster participants in Business Models Diagnosis and in the definition of "Target Business Models" to adapt their organizations to emerging markets and new value chains.
- Analysis of the interest and potential of activities to support entrepreneurship. Learn how other clusters support entrepreneurship and develop our own support. Which services will the cluster organisation provide and what should be done by others.

Financing

- Aspects regarding a sustainable financial set-up, the share of financial resources from the private sector, and acquisition of third party funding
- Monitoring tool for financial follow-up of the cluster organisation

Cluster recognition

- Communication strategies and tools - how to use successes in the communication
- Increase Media visibility of Cluster activities

The training needs listed above are a summary of the needs of all the 4 clusters.
The identified training needs of the participating clusters are described in more detail in Appendix 1, "***REPORT ON FUTURE ACTIVITIES AND TRAINING NEEDS OF THE CLUSTERS***"

Training programme

The training programme designed by the subcontractor need to use at least 5 modules from the training package as developed by the European Cluster Excellence Initiative. Complementary training to fulfil the needs may be added.

Size, duration, location and timing of the training assignment

- **Size:** The training will be provided for <u>8 persons/managers</u> from the clusters (Maximum 2 persons from each cluster). The training may be combined with training of other participants in a bigger group. The total cost of the training assignment is expected not to exceed **30.000 – 35.000 euro** (VAT included, if applicable) for a maximum of 8 persons.
- **Duration:** The training, or training modules, should be provided in <u>periods of a minimum of 2 days and maximum of 5 working days</u>. A minimum of 5 training modules must be delivered. The total duration of the training is up to the subcontrater to suggest.
- **Location:** The training may be provided at the location of the training provider, or at another convenient and agreed on location in Europe.
- **Timing:** The training should be <u>provided during the period January 1 – March 31, 2017</u>.
- **Training materials:** The training supplier should prepare adequate training materials, and provide them in paper and in digital format. These materials will become the property of the clusters and can be made public.

Content of bids

Bids are expected to contain the following information:

- Name and contact person of the organisation submitting the bid
- Brief summary of the relevant cluster training experience of the organisation, and the profile of the key persons providing the training.
- Content of the training, or the training modules, proposed and offered (training program)
- <u>Participation cost per person per training module exclusive VAT and the number of training days included in that cost.</u>
- Other expenses, such as travel and accommodation costs etc. of the participants, should be separated from costs of the training.
- Proposed time and location for implementation of the training/training modules.
- Eventual other information considered relevant by the bidding organisation.

Submission of bids

The bids should be sent by e-mail to johan.wasberg@merinova.fi
by December 7, 2016, at 16.00 h Central European Time

Evaluation of bids and selection of supplier(s)

The bids will, in addition to the total price, also be evaluated on the basis of the content and relevant experience of the organisation and person in charge of the training. The purchasing clusters may, if necessary, have negotiations with the bidding organisations in order to modify the proposed training and/or training modules.
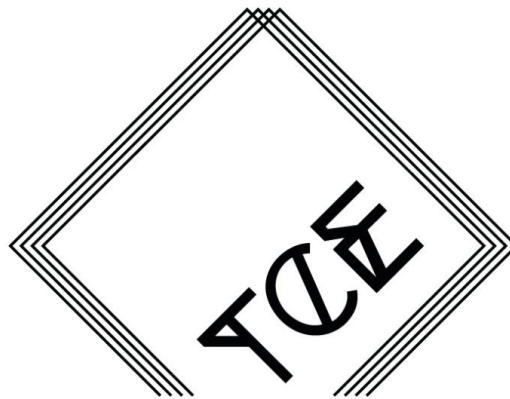
The supplier will be chosen in early December 2016. The successful bidder/bidders will be informed.

Vaasa, Finland, November 22, 2016

Enquiries:

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APPENDIX 1

TOWARDS CLUSTER EXCELLENCY

REPORT ON FUTURE ACTIVITIES AND TRAINING NEEDS OF THE CLUSTERS

Background and introduction

The four TCE clusters, EnergyVaasa/Oy Merinova Ab (Finland), CEPV (Spain), EnergyIN (Portugal) and the Paper Province ek. förening (Sweden), were benchmarked by ESCA experts between April 25 and May 12, 2016. The results of the benchmarking were presented in a joint workshop in Bilbao on June 7, 2016. As a result of the benchmarking, all the 4 clusters were awarded bronze labels and provided with their own benchmarking reports.

On the basis of the recommendations in the benchmarking reports, and taking into account the services to be provided by the participating clusters in the future, the specific training needs for the clusters have been identified. This document summarises the training needs. More detailed information on the recommendations and training needs is available in the cluster benchmarking reports.

Training needs of Oy Merinova Ab:

Cluster Management

- Strategy and governance: How to develop, document, and implement, the role of the cluster organization, governance and strategy, clarity of roles, involvement of stakeholder in the decision making processes, strategy review and impact/member satisfaction assessment
- Stakeholders identification and engagement: Stakeholders (Customers) orientation and segmentation – leading to a cluster of "committed participants" / tools and instruments supporting this issue, such as CRM-systems, feedback surveys
- Human resources; availability, stability, development, life-long learning

Services provided and activities

- Matchmaking and member networking with external partners
- Establishment of and working with specific technology or other working groups
- Export promotion initiatives and activities – including integration of foreign business students in the companies
- Development of entrepreneurship
- Technology transfer

Financing

- Aspects regarding a sustainable financial set-up
- Acquisition of third party funding

Cluster recognition

- Communication: Strategy and how to use successes in the communication

Training needs of CEPV :

Cluster Management

- Development of human resources in particular regarding training planning and lifelong learning aspects for the management team
- Methodology to register and measure the number of personal contacts between the Cluster Management Team and participants of the Cluster

Services provided and activities

- Technology transfer and development of collaborative R&D activities without third party funding
- Communication processes and matchmaking events to foster collaboration of Cluster participants with companies from other European regions and countries
- Support to Cluster participants in Business Models Diagnosis and in the definition of "Target Business Models" to adapt their organizations to emerging markets and new value chains
- Analysis of the interest and potential of activities to support entrepreneurship

Financing

- Monitoring tool for financial status of the cluster organisation

Cluster recognition

- Methodology to register and measure number of external requests for cooperation, classified by kind of entity and country of origin
- Increase Media visibility of Cluster activities

Training needs of EnergyIN:

Cluster Management

- Cluster mapping and engagement of cluster companies
- Cluster management (defining activities and services, evaluating members' satisfaction, creating and facilitating working groups)

Services provided and activities

- Matchmaking /networking, best practices and hands-on training (members and external partners)

Financing

Cluster recognition

- Communication strategies and tools

Training needs of Paper Province ek. förening:

Cluster Management

- Development of human resources regarding training planning for lifelong learning for the management team. How to measure that and also how to get sufficient international work experience for the team.

Services provided and activities

- Develop a broader range of tailor-made services regarding technology transfer and development of collaborative R&D activities without third party funding.
- Develop the service of international matchmaking events between cluster participants and foreign companies, research institutions and universities.
- Exchange of experience among participants and learning from best practices.
- Learn how other clusters support entrepreneurship to develop our own support. Which services will the cluster organisation provide and what should be done by others.
- Develop the services for internationalisation for cluster participants especially SMEs

Financing

- Aspects regarding share of financial resources from the private sector

Cluster recognition

- Develop international communication strategy especially regarding how to use successes in the communication.

Further action

Organisations providing relevant training in the selected areas will be screened, selected and contracted using appropriate and relevant competitive tendering processes. The training will be implemented for a maximum of two persons per participating cluster. A report on the lessons learned, how to implement these in the clusters, and recommendations on how to improve the training modules implemented will be prepared by the participating clusters.