



Co-funded by the COSME programme
of the European Union



TracE-KEI

GA n. 731126



Expression of interests for subcontractor launched by the EU COSME Project TRACE-KEI

Overview:

Seven European clusters, all members of the Trace-Kei (Transnational Cooperation Empowering Key European Industries) EU funded COSME project, seek submissions from suitably qualified trainers for the provision of a classroom based training course in Cluster Excellence Management. This is an open procedure regarding the training of cluster managers in the specific fields of Industry Analysis and strategic segmentation, business planning, value-chain analysis and cluster branding.

Project description:

TRACE-KEI aims at strengthening the cluster management of the participating clusters, in terms of defining medium-long term development strategy and improve the quality of services offered to their associate SMEs. In fact, through project activities (i.e. joint training and study visits), cluster managers will be provided with the necessary skills and tools to strengthen the aspects related to clusters management.

TRACe-KEI's specific objectives are:

- Improving the cluster management skills through joint trainings and study visits;
- Improving and tailoring services for the SMEs through evaluation of their specific needs and expectations;
- Increasing the peer-to-peer learning within and outside the TRACE-KEI consortium;
- Improving the capabilities of partner clusters to address new and emerging markets even outside EU countries

This call for expression of interest is part of the project TRACE-KEI which has received funding from the European Union, EASME, COSME Programme, Call COS-CLUSTER-2015-3-02, under GA 731126.



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- Designing a long-term strategy for further cluster excellence development
- Reinforce regional cluster policies and initiatives through the involvement of regional policymakers in the workshops for strategy definition at regional level
- Setting-up collaboration with experienced clusters following the cluster twinning approach
- Setting-up collaboration with experienced clusters following the approach “Rookies meet experts”
- Building up synergies and value chains between the 3 presented sectors, namely agrofood, ICT and energy.

More information about the TRACE-KEI project is found on the link below:

<http://www.clustercollaboration.eu/eu-initiatives/cluster-excellence/trace-kei-trans-national-collaboration>

The TRACE-KEI Consortium

Participant No	Participant Organisation Name	Country	Sector	Label
1 (Coordinator)	DISTRETTO AGROALIMENTARE REGIONALE SCRL (D.A.Re.)	Italy	Agrofood	Bronze label (now expired)
2	INNOSKART VALLALKOZASFEJLESZTESI NONPROFIT KFT (INNOSKART)	Hungary	ICT	Silver label
3	EURA-CONSULT AG (BioMA)	Germany	Energy	Bronze label
4	ASSOCIACAO PARQUE DE CIENCIA E TECNOLOGIA DE ALMADA/SETUBAL MADAN PARQUE (MaPAR)	Portugal	ICT	Bronze label
5	AGROFOOD MANAGEMENT SRL (AGROCO)	Romania	Agrofood	Bronze label
6	CLUSTER ZELENA SINERGIYA (GreSy)	Bulgaria	Energy	Bronze label
7	UDRUZENJE KLASTER ZA ENERGETSKU EFIKASNOST (CluEE)	Serbia	Energy	Bronze label



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The training needs background

On March 2017 the Agrofood Technology District, D.A.Re., as leader of the “assessment of Knowledge gaps” project task, performed a survey to identify the clusters’ managers Knowledge needs, which involved 2 managers per cluster and a control group, for a total of 23 staff member involved.

From the analysis of the questionnaires, D.A.Re. assumed that:

1. TRACE-KEI partners need to improve their capability to access private funding and support SMEs dealing with private investors. In this regard, **TRACE-KEI partners need to master business planning theory and practice;**
2. **Internationalization activities need to be strengthened** in all the clusters, both as participation in international trade mission and hosting or organizing of incoming business visits;
3. **Networking** should be reinforced and deal more with **value-chain approaches and cross-thematic opportunities;**
4. All the cluster managers have experiences in technology transfer, even if very few R&D results reached the market. Even if there is a limit in R&D public funding since the **product industrialization is normally not supported, it is very crucial that clusters support companies in this difficult activity.** The conditions for this service to be provided is that all the above competences are mastered;
5. Only three TRACE-KEI clusters deliver training programmes addressed to capacity building. In these three cases, trainings are not addressing external stakeholders and focus mainly on access to funding. The other topics addressed just in one out of three cases are: **innovation management, business management and internationalization.**
6. In terms of cluster strategy and monitoring, each cluster has its own strategy, every manager contributes but not all clusters revise it.

According to those results, cluster managers identify as paramount the following topics for the trainings:

- Cluster analysis
- Industry analysis and market segmentation
- value-chain analysis
- business planning
- Change management (communication/networking/innovation models....)
- cluster branding
- Internationalization
- Designing and implementing SMEs support services

However, according to the project activities, some of these modules would be covered by means of external experts support to be awarded for a mentoring programme and the game theory for clusters. In particular, internationalization, change management and the impact of services on competitiveness will be covered through those experts advice.

Therefore, the training modules the partners will award address the following topics:

- Industry analysis and market segmentation



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- value-chain analysis
- business planning
- cluster branding

Training requirements

This consortium wishes to select an expert(s)¹ with specific knowledge in “Cluster Excellence Management Training” to provide the appropriate training in line with the requirements indicated in this document. It is the consortium’s desire to obtain knowledge and practical skills to improve the cluster management capability and enable its managers to provide their own cluster members with high quality services.

The training modules will be devoted to provide the proper methodology to develop cluster strategic plans and strengthening support services design and improvement for the associates’ benefits.

Teaching modules will be complemented with best practices and case studies in order to ease the practical understanding and enable interactive discussion on the challenges of cluster management to unfold. It is essential that the training providers have considerable knowledge and experience in the 4 training modules required by the consortium.

The desired outcomes shall support cluster managers in leveraging associates’ strengths at a national and international level, creating new and lasting frameworks for the long-term sustainability and relevance of their cluster and empowering individual skills in cluster excellence management.

The training will be organized in two sessions.

The training providers shall clearly select just one of following strands and the related module, when apply.

Session 1 – Joint training on developing cluster strategic plans

This strand is aimed at giving the TRACE-KEI cluster managers a deeper Knowledge on industry analysis and Value-chain analysis. The training foresees has to cover the following modules.

Module 1:

Industry analysis, strategic segmentation and market foresight

The aim of this training module is to provide trainees with insights of the complexity of a particular industry. Industry analysis involves reviewing the economic, political and market factors that influence the way the industry develops. Porter’s 5 forces will be analysed and how to assess and evaluate market development (market foresight)

Duration: 6 hours

¹ Applicants can be either organisations (companies, foundations, etc.) or group of natural persons. In the latter case, applicant is required to submit the proposal with only one leading member, specifying the group members and their specific skills and experience in the subjects of the 4 core modules. In case the applicant is a group of natural persons, it will fall under the leading member responsibility the level of performances and results of the other trainers of the group, being him/her the only contracting party responsible for the implementation of the task.



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Module 2:

Value-chain analysis

The aim of this training module is to provide trainees with insights of cross-sectoral opportunities, Value-chains, services to generate a more sustainable efficiency and competitive ecosystem.

To this end, value chain analysis will support cluster managers to acquire a strategic vision for building new industrial value chains in their territories and across the Consortium.

Value-chain analysis should be preferably addressed to the sectorial combination potential the three TRACE-KEI clusters represent.

Duration: 6 hours

The session 1 will take place in Bari, Italy, in the period from 28 to 30 June 2017 for an overall duration of maximum 2 days.

The total cost for these 2 modules is quoted € 1.500,00.

D.A.Re. shall be in charge of the reimbursement of the trainers fees, travelling and accommodation costs.

Session 2– Joint training on strengthening support services

This strand aims at giving strategic and practical skills to deliver high quality support services for SMEs.

The cluster managers will be empowered to deal with innovative tools to support cooperation among partners, (SMEs, academia, policy makers and final users) and identify the right mix of targeted services to boost the flourishing of new ideas, solutions (in terms of process, services and products) and private investment opportunities.

As announced above, the module that will be provided at this stage would cover the cluster-branding topic, as the change management, the impact of services on competitiveness and internationalization will be cover along other project activities.

Module 1B:

Business Planning

The aim of this training module is to provide trainees with tools to support sustainable financial set-up, the share of financial resources from the private sector, and acquisition of third party funding. The module will highlight the methodology to draft a business plan to be adopted by the cluster per se, whether it is willing to acquire third party funding, and for its associates in case they need to apply for seed capitals or venture capitals.

Duration: 8 hours

Module 2B:

Cluster Branding

The aim of this training module is to provide trainees with tools to use branding to improve their attractiveness and international profile to attract investments and promote internationalisation and exports. More specifically the training modules will cover brand identity, positioning, marketing and communication strategy topics enabling to increase the



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cluster reputation among its associates and beyond.

Duration: 4 hours

The session 2 will take place in Budapest, Hungary, in February 2018 for an overall duration of 1,5 day.

The total cost for this module is quoted € 1.500,00.

Innoskart shall be in charge of the reimbursement of the trainers fees, travelling and accommodation costs.

Trainers required Qualifications and skills

- Fully proficient in reading, writing and understanding English
- A minimum of three (3) years professional experience in cluster training
- Experience in delivering the specific training module/s
- Experience in managerial trainings

Required Methodology

The successful expert(s) is/are expected to create a two-fold methodology combining a theoretical and practical approach allowing attendees to learn about real solutions to real problems.

Number of participants:

The trainings will address 14 participating clusters' staff + maximum 5 auditors.



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Language:

The language of the course will be English.

Training Materials:

The successful expert(s) will be responsible for developing every support material to be used during the training programme, which must include training materials and case-studies (for 14 participants). The training materials provided are one of the project deliverables and will remain the property of the participants and can be made public.

Contracting Authorities:

Two organisations will be responsible for contracting the successful expert(s). DARE will be responsible to award contract for the first session in Bari (IT) and Innoskart will award the contract for the second one in Budapest (HU).

Terms and Payment:

The estimated maximum value of the contract is:

Session 1: €1.500,00 (one thousand and five hundred euros) plus travel costs and subsistence allowances to be covered by DARE. The costs will include the training materials as well.

Session 2: €1.500,00 (one thousand and five hundred euros), plus travel costs and subsistence allowances to be covered by Innoskart. The costs will include the training materials as well.

Payments will be made in Euros. The amount paid to the expert(s) shall be VAT excluded.

Evaluation criteria:

The evaluation will be based on cumulative analysis from all the 7 partners and will be weighted on the following criteria:

- Qualifications 30%
- Expertise in other related trainings 40%
- Best economic offer 30%

Total maximum score is 100%.

The applicants will be selected on the basis of the highest score obtained. In case of a tie, the applicant with a lower price offer will be awarded. The evaluation of the offers received will be performed by the TRACE-KEI consortium.



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Application procedure:

Interested applicants must submit the application documents to Giuliano de Seneen (Trace-Kei Financial manager) by e-mail g.deseneen@darepuglia.it and darepuglia@pec.it, at the latest on the 27.05.2017 at 17:00 CET.

Application documents are expected to contain the following information:

- Personal contact details of the expert(s)
- Brief summary of the relevant cluster training experiences
- CV of the expert(s) that will be delivering the training including at least 2 references
- Content of the training, or the whole training module/s, proposed and offered
- Other relevant information to prove the required qualifications and skills
- Examples of previous trainings

All documents and information provided must be in English.

Timeline:

Publication date 11.05.2017

Question deadline 21.05.2017 at 12:00 CET

Answer deadline 24.05.2017 at 12 CET

Time limit for receiving applications 27.05.2017 at 17:00 CET (to both email addresses)

Time for replying to applicants 09.06.2017

Contact details:

Giuliano de Seneen

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TRAINING (Application)

***TRAnsnational Collaboration empowering Key European Industries
- (TRACE-KEI) - Clusters Excellence Programme – COS-CLUSTER-
2015-3-02***

ANNEX A - N° prot. 235 – May 10, 2017

**CLOSING DATE:
17:00 (CET) of Friday 27 May 2017**



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TO BE FILLED-IN BY INTERESTED EXPERT

Quotation date (day/month/year): ___ / ___ / ___

2.1 Subcontractors contact details

Expert name and surname	
Expert postal address	
Expert mobile number	
Expert fax number	
Expert e-mail address	

The experts have to send the CV including at least 2 references

2.2 Brief Summary of the relevant cluster training experiences

2.3 Content of the training, or the training modules, proposed and offered

Session 1 - Joint training on developing cluster strategic plans		Tick
Module 1	Industry analysis, strategic segmentation and market foresight	<input type="checkbox"/>
Module 2	Value-chain analysis	<input type="checkbox"/>
Session 2 - Joint training on strengthening support services		Tick
Module 1B	Business planning	<input type="checkbox"/>
Module 2B	Cluster branding	<input type="checkbox"/>

2.4 Other relevant information to prove the required qualifications and skills



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2.5 Examples of previous trainings

2.6 Content of the training module/s: describe how you are willing to manage the training including theory, working groups, questionnaire etc, as well

Signature:

Expert Name and Surname: