

# OPEN CALL FOR APPLICATIONS FOR THE SELECTION OF ADDITIONAL CLUSTER BENCHMARKING EXPERTS OF THE EUROPEAN CLUSTER EXCELLENCE INITIATIVE (ECEI)

## 1. BACKGROUND

In an effort to create more world-class clusters across Europe, the European Commission (DG GROW) launched in 2009 the European Cluster Excellence Initiative (ECEI). The initiative resulted in the development of a European wide benchmarking and labelling scheme for cluster management organisations, which is designed to raise the innovation capacity and competitiveness of cluster organisations.

The benchmarking covers 40 questions/indicators that analyse clusters and the cluster management organisations with regard to six dimensions, including the structure of the cluster, governance and strategy of the cluster, financing of the cluster management organisation, services provided by the cluster management organisation, contacts and interaction with relevant players.

Cluster organisations that participate in the benchmarking process and fulfil a set of minimum criteria are being awarded the “Cluster Management Excellence Label BRONZE – Striving for Cluster Excellence.”



So far, more than 1,000 cluster management organisations have been benchmarked under ECEI all over Europe and beyond.

More advanced cluster management organisations are being awarded with the two higher level labels, the “Cluster Management Excellence Labels SILVER and GOLD.”

## 2. FEATURES OF THE ECEI NETWORK OF BENCHMARKING EXPERTS

The European Cluster Excellence Initiative (ECEI) is based on a network of currently about 150 trained benchmarking experts from different European countries who conduct regular benchmarking activities. All benchmarking experts have been working with clusters and cluster organisations for many years. A list of current benchmarking experts can be found here: <https://www.cluster-analysis.org/esca-experts>

The network is currently administrated by European Secretariat for Cluster Analysis (ESCA), which is hosted by the Berlin-based VDI/VDE-IT. ESCA provides all support related to data management and analysis and assists the ESCA experts in their efforts wherever possible.

## **2.1 RULES OF ENGAGEMENT AND OPERATION OF THE ECEI NETWORK**

A benchmarking routine is divided up into various stages. The working language is English, unless a special additional arrangement has been made. The stages include:

- i) Preparatory stage (including contractual agreements between the cluster organisation, the expert, and ESCA)
- ii) Data collection (to be done by the benchmarking expert)
- iii) Data analysis and evaluation (to be done by ESCA)
- iv) Documentation of the results (to be done by ESCA)

Remuneration of experts is conditional on the respective agreement and division of work between the expert and ESCA and the expert's country of origin. Daily rates apply and travel costs are compensated.

VDI/VDE-IT and ESCA, as an operating unit of VDI/VDE-IT, assure full transparency as regards any benchmarking-related fees and remunerations as well as strict confidentiality concerning the data and information received.

## **2.2 BENCHMARKING PROCESS**

Benchmarking for cluster analysis is based on a personal interview (on-site or via video conference) with the manager of a cluster management organisation. The interview (which takes about three hours) captures data on the different dimensions of the cluster. The data is compared to a portfolio of around 200+ clusters from different countries, regarding clusters in the same technology area, the same country (if enough data is available from the particular country), and particular excellence cases. The results of the analysis draw a detailed picture of the cluster and the cluster organisation in comparison to its peers in terms of the structure of the cluster, cluster management and cluster governance, financing, services provided by the cluster management organisation and achievements of the cluster management organisation. During the interview, the benchmarking expert is encouraged to provide recommendations for further action based on his/her experience in working with/for clusters.

The European Secretariat for Cluster Analysis (ESCA) will analyse the data that has been gathered by the benchmarking expert and provide a detailed report in English, including:

- A graphical comparison of the cluster with peer clusters from the same technology areas and with clusters from other areas;
- An evaluation of the cluster's strengths and weaknesses;
- A comparison with the indicators on cluster management excellence according to the 'European Cluster Excellence Initiative;'
- Recommendations for improvement.

## **2.4 TRAINING FOR NEW BENCHMARKING EXPERTS**

The European Cluster Excellence Initiative (ECEI) is looking to expand its network of Cluster Labelling Experts by providing new training opportunities to interested candidates.

The training consists of a theory and a practical part:

a) On Tuesday April 9 and Friday April 12, 2019 VDI/VDE-IT will organise two opportunities for an English-based online webinar in order to introduce interested candidates to the concept of cluster benchmarking and the methodologies and tools of the European Cluster Excellence Initiative. This part of the training is offered free-of-charge in the context of the current project “European Cluster Excellence Initiative, Phase 2” co-funded from COSME. Free-of-charge training materials, which will also be used for future seminars and trainings, will be made available.

b) In addition to this theory training, practical experience has to be sought and documented. This can be done by joining a real assessment: In order to do so, candidates will be provided with a list of scheduled assessments in their respective region. This part of the training is at own expenses of the “expert in training.”

Participants will have to successfully pass a written examination at the end of the theory training (i.e. preparing a short essay on the main features of the discussed benchmarking and labelling concept) and have to document their practical part by preparing a short summary of a real assessment (to be evaluated by ESCA) in order to qualify as an assessor.

Upon successful termination of all components of the training (theory, exam, practical experience), the new benchmarking experts will be listed on the ESCA webpage, are ready for being involved in the cluster labelling procedures, and, once they have gained sufficient practical experience, are eligible for advanced training to become active in GOLD and SILVER Label assessments.

## **3. APPLICATION PROCEDURE**

The training is open to all candidates expressing their interest and fulfilling the requirements listed under Point 4 of this call (Selection Criteria).

Interested candidates are invited to express their interest by sending an e-mail in English to [ECEI-Benchmarking-Expert@vdivde-it.de](mailto:ECEI-Benchmarking-Expert@vdivde-it.de). Please indicate your preferred date (April 9, 2019 or April 12, 2019) on the application form.

### Supporting documents

Application form

Short Curriculum Vitae (CV) in English

Additional supporting documents may be requested at a later stage.

### Deadline for application

This call will close on April 1, 2019

#### **4. SELECTION CRITERIA**

Interested candidates must fulfil the following requirements:

- Professional experience in cluster and/or network management and/or cluster policy or similar experiences (min. 2 years)
- very good command of the English language (minimum level C1)
- Signed IP agreement with VDI/VDE-IT (to be signed by the employing organisation of the Benchmarking Expert and the Benchmarking Expert)
- good understanding of the national and European cluster community and relevant policies at European, national and regional level
- Awareness of individual potential conflicts of interest in relation to acting as a Benchmarking Expert

#### **ANNEXES**

- I) Application form
- II) IP Agreement

**ANNEX I: APPLICATION FORM**

Registration form for interested candidates  
“Benchmarking Training – Context ECEI2 Project”  
Webinar, April 2019 + Practical Part

First name / surname

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Organisation

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Street address

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Postal/zip code

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City

---

Country

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Telephone

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E-mail

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Signature and date

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Preferred Date

Tuesday, April 9, 2019

Friday, April 12, 2019

# Intellectual Property Agreement

## for Cooperation in the Context of the Benchmarking of Cluster Organisations and the Use of Related Materials Provided by ESCA for this Purpose

### Between

European Secretariat for Cluster Analysis (ESCA), c/o VDI/VDE Innovation + Technik GmbH (VDI/VDE-IT), Steinplatz 1, D-10623 Berlin, referred hereafter as "ESCA"

### And

Organisation: \_\_\_\_\_ ,

Address: \_\_\_\_\_ ,

Nominating the following employee to become an external expert for benchmarking activities of cluster organisations together with ESCA:

Title, First Name, Name: \_\_\_\_\_ ,

referred hereafter as "the Benchmarking Expert"

ESCA and (Organisation Name) \_\_\_\_\_  
jointly referred as "Parties"

### Preamble

Over the years, ESCA has developed a methodology to perform a benchmarking of cluster organisations. The benchmarking consists of two parts: A benchmarking interview and the data analysis resulting in an individual benchmarking report. Whereas the latter always has to be performed by ESCA (due to the fact that all comparative data and the routines for data analysis must be hosted at one point), the interviews can be conducted by any (local) Benchmarking Expert, who has to be appointed by ESCA after having participated in an according interview training provided by ESCA.

ESCA is interested in establishing an international network of approved Benchmarking Experts for disseminating the methodology and for conducting benchmarking interviews according to a given interview guideline. ESCA furthermore encourages all approved Benchmarking Experts to raise interest among cluster organisations in participating in the ESCA benchmarking projects.

**The Parties agree as follows:**

1. The Parties agree to perform any benchmarking projects in good cooperation and with due diligence.
2. The parties agree to handle all data strictly confidential which was assessed during any benchmarking project.
3. Concerning potential incomes and expenses in relation to the performance of any benchmarking projects, the Parties in all cases will conclude a separate individual agreement.
4. ESCA can perform complete benchmarking projects without involving any external experts. The Benchmarking Expert however in any case will always have to involve ESCA for the data analysis and the elaboration of the individual benchmarking report. The Benchmarking Expert and his/her employing organisation ensure to inform ESCA in advance of all his/her planned benchmarking exercises in written form and that all activities are performed jointly with ESCA.
5. An approval of Benchmarking Experts relates to the individual person, not to his/her employing organisation. An approval of a Benchmarking Expert however automatically expires upon any change of his/her employing organisation.
6. ESCA is not required to accept every interested individual person applying to become a benchmarking expert. Upon refusal of an individual person, specific reasons will be explained.
7. ESCA provides a training for selected individuals to be enabled to act as a Benchmarking Expert after signature of this Intellectual Property Agreement. In order to be eligible for a training, professional experience of the potential Benchmarking Expert in cluster management and/or the evaluation of clusters and/or cluster policy is mandatory.
8. ESCA provides a benchmarking interview guideline and a sample benchmarking report to the Benchmarking Expert. Additionally, ESCA is available for the Benchmarking Expert for any clarification questions in relation to the interview guideline and the entire benchmarking methodology as such. The benchmarking interview guideline is mandatory and cannot be changed by the Benchmarking Expert without written consent of ESCA.
9. The Benchmarking Expert and his/her employing organisation ensure that ESCA's copyright of all materials received is acknowledged.
10. After having trained a Benchmarking Expert, ESCA requires at least two benchmarking interviews to be performed by the Benchmarking Expert within six months after the training, after that two benchmarking interviews within one year, in order to maintain the approval status of the Benchmarking Expert.
11. The Parties agree on a general openness to jointly discuss issues of further development of the methodology of benchmarking of cluster organisations.
12. The agreement is permanent, if not terminated due to insufficient activity of the Benchmarking Expert (see 10.). The Parties have the right to terminate the agreement in written form without any reasons with three months period of notice.
13. If the agreement is terminated, whatever the cause of the termination is, the Benchmarking Expert and/or the employing organisation will return to ESCA and/or delete any electronic or printed copy of the materials received.

14. The agreement is submitted under German law. Any litigation relating to this agreement, its interpretation or execution, which cannot be resolved amicably, will be submitted to the Berlin courts.

Signed on behalf of VDI/VDE-IT:

Signed on behalf of the employing organisation of the  
Benchmarking Expert:

Peter Dortans  
(Managing Director)

Name:

Position:

Date:

Date:

Company stamp:

Dr. Werner Wilke  
(Managing Director)

Content of this agreement acknowledged by the  
Benchmarking Expert:

Date:

Name:

Content of this agreement  
acknowledged by ESCA:

Position:

Date:

Name:

Position:

Date:

Helmut Kergel  
(ESCA)