

ClusterXchange Frequently Asked Questions by Partnerships collected by the ClusterXchange Support Office

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#	Eli	gibility criteria
1	Q	Are large companies, public authorities at both regional and city/administration levels,
		innovation agencies and universities eligible for ClusterXchange?
	А	As <b>Visiting Organisations</b> , the following are eligible for ClusterXchange:
		All cluster organisations and business network organisations from COSME participating
		countries,
		• scaling-up support organisations from COSME participating countries that are cluster
		members,
		SMEs from a COSME participating country that are cluster members.
		<b>"Scaling up support organisations</b> " include technology centres, research institutes, fab labs, (digital) innovation hubs, creative hubs, resource-efficiency service providers, incubators and accelerators. They comprise any public or private organisations 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.
		For the case of <b>Host Organisations</b> , in addition to the above-mentioned organisations, the following are also eligible:
		<ul> <li>training providers from a COSME participating country that are cluster members,</li> </ul>
		• large companies from a COSME participating country that are cluster members,
		• public authorities at both regional and city/administration levels that are active in a
		cluster from a COSME participating country.
		Therefore, <b>innovation agencies and universities</b> are eligible to participate in ClusterXchange as
		both a Visiting and Host organisation. However, large companies and public authorities can
		only participate in ClusterXchange as a Host Organisation.
2	Q	Can organisations from the United Kingdom still participate in the CXC scheme?
	А	Organisations from the United Kingdom are still eligible to participate in CXC under the <u>COSME</u>
		programme.
3	Q	Is an SME, a cluster and a business network organisation that is not part of a European Cluster Partnerships   Excellence eligible to participate in ClusterXchange?
	А	Yes. A member (SME or scaling-up support organisation) of a cluster organisation or a cluster
		organisation itself profiled on ECCP does not need to be part of a European Cluster Partnerships
	Th	Excellence to participate in CXC. e new CXC IT Tool
# 4		Who can access the new CXC IT Tool?
	<b>Q</b> A	Unlike the previous CXC IT Tool version, the new CXC IT Tool is only accessible by the Partnership
		administrators in the beginning. In order to ensure that a Partnership member is an administrator, they must contact a Partnership administrator to add them as one in their ECCP Partnership profile. In case of doubt or inability to do so, Partnership members can consult the ECCP FAQ, contact ECCP at <u>contact@clustercollaboration.eu</u> or the CXC SO at <u>clusterxchange@clustercollaboration.eu</u> .
		Partnerships are in charge of encoding the exchange information in the CXC IT Tool, including the VO(s) and HO details. Once these details have been saved in the CXC IT Tool, VO and HO administrators can then access the CXC IT Tool to review or edit the exchange.
5	Q	How do Partnerships encode an exchange in the new CXC IT Tool?
	А	When accessing the new CXC IT Tool, Partnership administrators will be able to see the
		exchanges created under the same Partnership. Administrators can "Add a new exchange" in the "Exchanges" section of the CXC IT Tool. After entering an exchange name, an exchange draft will
		be saved and administrators will be asked to fill out the exchange details in 6 steps: from VO(s)
		information, HO information, exchange details, CtQ creation, and FA creation to uploading
		signed exchange documents.
		Once all these steps have been completed, the Partnership will submit the exchange for the CXC
		SO's validation and, once the latter has approved the exchange, the organisations may execute
		the exchange.



9	Q	How can a participant edit an exchange after it has been submitted for validation?
	A	Once an exchange has been submitted for validation, an administrator cannot edit it and needs to contact the CXC SO ( <u>clusterxchange@clustercollaboration.eu</u> ) so they can send the exchange
		back to "Draft". Please note that the Commitment to Quality must be signed again after edits
		have been made. Therefore, make sure to contact the CXC SO with any doubts before submitting
		an exchange for validation.
10	Q	Why are Organisations not visible in the scroll-down bar when trying to add them to an
	A	exchange in the CXC IT Tool? Organisations participating in CXC must have a published and visible ECCP Profile. In the CXC IT
		Tool, organisations without a published ECCP profile cannot be selected to be added to an
		exchange.
		When an organisation creates a profile on ECCP, it is submitted for review by the ECCP team. The
		latter decides to approve or reject an organisation's profile and provides feedback supporting
		their decision. The organisation can then edit their profile to implement their feedback, if
		possible. This means that, if an exchange has been planned with an organisation without an already created ECCP profile, participants of this exchange must anticipate the time of creation
		and validation of said profile, as well as the possibility that the profile may not be validated.
#	Exe	change building
11	Q	What is a group of exchanges and how is it set up?
	А	A group of exchanges under CXC is an event bundling multiple exchanges, arranged between
		one HO and multiple VOs. All the participants of this event are expected to prepare individual
		Commitment to Quality reports (containing the same objectives, agenda and expected
		outcomes) signed between each VO and the HO, as well as the VO's and HO's Partnerships managing them.
		ClusterXchange will count each exchange individually between the HO and each VO. In case
		financial assistance is involved in the form of lump sums, a Financial Agreement should
		additionally be signed between each VO and its Partnership (VOP).
		In the CXC IT Tool, when creating an exchange, administrators will be asked whether they are
		encoding a single or a group exchange. When selecting the "group" option, administrators will
		be able to add as many VO profiles as they need into the exchange. Moreover, administrators have the option to change a group exchange into a single exchange, and vice-versa.
12	Q	Can a Host organisation participate in a country other than where the Host country is
		located?
	A	As per the rules of CXC, the HO cannot travel and should choose the country where they are
		based as their permanent residence. An HO organising an exchange in a different country to where they are officially located is only possible if a specific branch of the HO is registered in that
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	A	The person registered as a representative of the HO's branch in the CXC IT Tool profile must have permanent residency in the country of said branch. If that is not the case, the exchange would not be eligible in CXC. <b>Can a Partnership reject an organisation that is not part of its own Partnership (as a beneficiary/partner or a member of a partner) or not focusing on the sectors of activity covered by its respective Partnership?</b> CXC is open to any eligible organisations even if not linked to any Partnership or sectors of activity covered by the Partnerships in ClusterXchange. A potential participant can only be rejected in justified circumstances, such as for instance ineligibility of the organisation applying for an exchange. In the eventual case, the selected Partnership does not have further funds to finance exchanges, a Partnership can request the potential participant to select another Partnership. Before doing this, the CXC SO's assistance should can be requested (clusterxchange@clustercollaboration.eu) to find a suitable alternative Partnership.



15	Q	Is it possible to cover a sector of activity in an exchange that is not represented by any of the Partnerships?
	A	It is possible to cover sectors via exchanges that are not the focus of any of the Partnerships in CXC. The sectors and topics covered in an exchange should be agreed on by the respective VO and HO.
16	Q	Can a person other than the one registered on the CXC IT Tool perform the exchange?
	A	For the case of Visiting Organisations, it is strictly required that the VO's representative registered in the CXC IT Tool performs the exchange. For the case of the Host Organisation, this is not a strict requirement, even if preferred.
17	Q	What kind of activities can be performed during an exchange?
	A	The overall aim of the scheme is to help HOs and VOs select the activities that would best assist them in gaining skills and knowledge to boost their business, managerial, competitiveness, networking capabilities and knowledge-sharing abilities, among others, through personal and direct interaction with other actors in clusters.
		<ul> <li>The action plan of an exchange is defined and agreed upon in the CtQ report. Some of the recommended activities for an exchange include:</li> <li>Job shadowing where the visitor(s) accompany the host as a capacity-building activity during working hours.</li> <li>Conducting market research with experienced professionals in the field.</li> <li>Project development and management (However, the Partnerships should keep in mind that the activities should not solely focus on the preparation of a proposal for other grants (e.g. Horizon Europe calls) as this does not meet the exchange criteria set in the Call for Proposals or the <u>CXC Quality Manual</u>).</li> <li>SME finance training.</li> </ul>
		<ul> <li>SME finance training.</li> <li>Business operation and management of best practice exercises.</li> <li>Branding, sales and marketing of clusters or companies.</li> <li>Teamwork and group training.</li> <li>Networking and new market entrance teachings.</li> </ul>
		For more information about the activities in CXC, please refer to the CXC Quality Manual.
18	<b>Q</b> A	<ul> <li>How should the Commitment to Quality and Financial Agreement be prepared?</li> <li>The Commitment to Quality report (CtQ report) is generated by the CXC IT Tool, based on the information filled in the exchange's Draft; and the Financial Agreement template is downloaded in a Word document from the CXC IT Tool in the Preparation status. When supporting HOs and VOs to prepare the action plan for the exchange and the content for the CtQ report, the Partnerships should pay close attention to the following points (not an exhaustive list):</li> <li>The objectives for the exchange should be clearly defined and outlined. The overall and specific objectives for the exchange should be detailed, including the individual objectives of the HO and VO and related indicators (if there are any). The details need to be as specific as possible with examples of expected results and outcomes per objective.</li> </ul>
		• The action plan and agenda for the exchange should include the following aspects:
		a. description of the HO's actions in clear 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, 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.
		b. description of the VO's actions (overall), and
		c. 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 (websites/physical addresses of each site visited) and speakers/facilitators/presenters of each session (where available/possible). Please show/include the time for coffee and lunch breaks, and check-in and check-out time in the agenda (where possible). The agenda for each day normally needs to have a minimum of what is considered a normal working day of the HO (7-9 hours,



		<ul> <li>normally) to count as a full day. Each day should not be the exact copy of the other, but show diversity that demonstrates each of the objectives that was covered. The time spent on transfer during the exchange (e.g. to go from session A to session B) can be accounted for in the agenda. The ratio of time spent on transfer versus time spent on actual exchange should be 1:3 or more for actual exchange. The travel time from the VO to the HO does not count as part of the agenda.</li> <li>The expected outcomes from the exchange should briefly list concrete and intangible impacts and outcomes expected, in relation to the objectives. The development of CtQ reports should be done by consulting the Partnership(s) in charge of the VO and HO. Once the content is ready, the Partnerships will take the lead in submitting the contract to the CXC SO for validation by email at least two weeks before the exchange is due to begin, in order to allow more time for revision and changes. After the CtQ report has been revised and validated by all parties, it should be signed following the guidelines stated in Question 20.</li> </ul>
		In the Financial Agreement, the Partnerships in charge of VOs (VOPs) take the lead in the process to download the template from the CXC IT Tool and work together with the eligible VOs to fill in the necessary information manually. The VOPs have to carefully verify that the information provided by the VOs (e.g. personal and bank details) is correct. In addition, the VOP should follow the guidelines for the provision of financial support to VOs enclosed in the <u>CXC Quality Manual</u> . The CXC IT Tool only displays the maximum lump sum that can be provided to the respective VOs (in the exchange detail page) based on each Host country's amount per month (See <u>Quality Manual</u> ). Once the information is verified, the VOPs and VOs can sign and upload the agreement on the CXC IT Tool in a PDF format. See Question 21 for more information about the validation timeline of CtQ reports and Financial Agreements.
19	Q	Who should sign the Commitment to Quality and Financial Agreement?
	A	The Commitment to Quality report (CtQ) has to be signed by all the parties involved in an exchange: the HO and VO and their respective Host Organisation Partnership (HOP) and Visiting Organisation Partnership (VOP). The Financial Agreement is signed between the VO and the VOP. For the VO and HO, the signatories should be the authorised representatives of the organisations (e.g. directors, managers, or anyone with the authorisation to sign on behalf of the organisation). This person is often different from the representative of the organisation participating in the exchange. It is important to note, however, that the person registered in an organisation's profile on the CXC IT Tool should be the one that will represent the organisation in the exchange and, therefore, this person should appear in the Commitment to Quality in this role. As for the Partnerships, the signatories must be the authorised personnel that can sign in their name (e.g. coordinator).
20	Q	What is the procedure for signing the Commitment to Quality and Financial Agreement?
	A	<ul> <li>The Commitment to Quality and Financial Agreement can contain handwritten and/or electronic signatures. The following rules apply to the signature of these documents.</li> <li><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.</li> <li>A qualified electronic signature is an advanced electronic signature which is additionally: <ul> <li>created by a qualified signature creation device (QSCD);</li> <li>and is based on a qualified certificate for electronic signatures.</li> </ul> </li> </ul>
		<ul> <li>How to create a Qualified electronic signature?</li> <li>1. Obtain a digital certificate from a Trust Service Provider (TSP) <ul> <li>European Union Trusted List: <a href="https://webgate.ec.europa.eu/tl-browser/#/">https://webgate.ec.europa.eu/tl-browser/#/</a> 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</li> </ul> </li> </ul>



		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.
		<ol> <li>Using <u>Trusted List Browser</u>, go to <u>"Search by Type of service"</u> (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.</li> </ol>
		<ul> <li>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 4th Generation Partnerships check the signatures and the validity of their certificate with the following tool: <ul> <li>The DSS Demonstration validation tool available at <a href="https://ec.europa.eu/cefdigital/DSS/webapp-demo/validation">https://ec.europa.eu/cefdigital/DSS/webapp-demo/validation</a> can help check the validity of a certificate by indicating the number and type of valid signatures in a document.</li> </ul> </li> </ul>
		<ul> <li>4. More background information can be found here: <u>https://ec.europa.eu/cefdigital/wiki/display/CEFDIGITAL/eSignature</u> If you have a specific question you can also contact the <u>CEF Digital Help Desk.</u></li> <li>If all electronic signatures are valid, then the signed document is valid too.</li> </ul>
		<u>The documents containing only hand-written (BLUE INK) signatures:</u> The document must be signed in BLUE INK in original, which is a hand-written signature, and should be sent to the Partnership that is collecting it. It is allowed to sign the CtQ report on different pages, in order to make the process speedier.
		In the case of both electronic and hand-written signatures included in a document, those who sign the document by hand must do it first. Once the hand-written signatures are collected, the participants signing the document electronically shall proceed.
21	Q	Should the Commitment to Quality and Financial Agreement for physical exchanges be sent to the CXC SO for revision before the exchange begins?
	А	Commitment to Quality
		Yes - it is strongly encouraged that all Partnerships in charge of exchanges must ensure the CtQ report(s) are submitted to the CXC SO for validation via email prior to signing the document by the HO, VO(s), VOP and HOP and <b>at least 2 weeks before the exchange takes place</b> . This step is encouraged in order to ensure the action plans and duration of the exchange meet the minimum requirements for a CXC exchange. The CXC SO will provide comments to the VOP and HOP via email. Upon reception of the email from the CXC SO, the Partnership(s) are responsible to make sure the necessary corrections and modifications are implemented and CtQ is sent to the CXC SO for validation if needed. Once the CtQ report(s) are validated by the CXC SO, the HO, VO(s), VOP and HOP can sign the CtQ reports and upload them to the CXC IT Tool. The signature of the Commitment to Quality should follow the procedure described in Question 20.
		It is important to note that, the CXC SO will validate the exchange on the CXC IT Tool after the signing of documents has taken place. This means that were the CXC SO to not validate an exchange submitted, the CtQ report and/or FA may need editing and, as a consequence, the documents would need to be signed again.
		<u>Financial Agreement</u>
		No. The Financial Agreement template can either be created or downloaded from the CXC IT Tool and filled in with the relevant details and then the VO and VOP sign and upload the document on the CXC IT Tool. Before preparing the Financial Agreement, the Partnerships should carefully



		and accurately calculate the lump sum for the VO(s) following the guideline in the <u>CXC Quality</u> <u>Manual</u> (Section 2.6). The signature of the Financial Agreement should follow the procedure in Question 20. Note that VOs that are beneficiaries of the Partnership grants do not have to sign the Financial Agreement - see Question 22 for more information.
22	Q	What financial assistance are organisations members of Partnerships (and therefore beneficiaries of their Partnership's grant) entitled to when participating in exchanges?
	A	Organisations members or Partnerships 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-2020-02-02) 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 organisations members of Partnerships must be registered under their own Partnership on the CXC IT Tool and sign the Commitment to Quality to make sure that the exchange is funded by their Partnership's budget.
23	Q	How are exchanges counted towards the Key Performance Indicators (KPIs) of a Partnership?
	A	An exchange can be counted just once towards KPIs. This rule is particularly important when the Partnerships that manage the VO and HO in an exchange are different (VO and HO are related to different Partnerships). The exchange is only counted towards the KPIs of the Partnership that organises the exchange and pays the financial assistance to the VO. This means that an exchange can only be counted towards the KPIs of the KPIs of paying the financial assistance) and not towards the KPIs of the HOP.
24	Q	How many of the exchanges under the management of each Partnership should include
	~	participants from outside of the respective Partnership?
	A	ClusterXchange is not limited to the direct beneficiaries of the Partnerships and their members. 25% of the exchanges of a Partnership must include a participant (either as HO or VO) that is not a beneficiary, nor a member of a beneficiary of their Partnership. The external participant can be a beneficiary (or a member of a beneficiary) of another Partnership.
#	Exe	change execution and finalisation
25	Q	What type of feedback is needed from the HOs and VOs as proof of having participated in the ClusterXchange scheme?
	A	HO and VO are required to present a Final Activity Report through the CXC IT Tool at the end of the exchange. The Final Activity Report will be evaluated and approved or rejected by the Partnership responsible. This report is a primary source of evidence of the exchange having taken place. However, as the travelling party of an exchange, the VO is also required to present evidence of having travelled to the HO's country. In this case, it is the responsibility of the VOP to request the type of proof (e.g. hotel invoice, rent contract, boarding passes, letter from the HO) they need. They are encouraged to inform the VO before the exchange arrangements are finalised about the type of proof they need and when it should be delivered.
26	Q	Can there be third parties involved in the activities envisaged for an exchange?
	A	Yes, the activities planned for an exchange can also include elements with third parties, other than the HO and VO representatives, if their involvement increases the impact of the exchange. For example: widening networking opportunities, exposure to new markets and methods, and increasing skills and knowledge through the involvement of a professional trainer.
27	Q	After an exchange has concluded, what documentation is needed?
	A	An exchange is considered completed when two Final Activity Reports have been submitted respectively by the HOs and VOs and the HOP and VOP have validated them. They should be filled out in the CXC IT Tool within 7 days after the exchange ends.
28	Q	What should I do when my exchange is in "Ready to Start" status and the exchange has already taken place?



		status for you. However, it is strongly discouraged that the exchange begins before the status
		"Ready to Start" has been reached on the CXC IT Tool.
29	Q	Do the Partnerships in charge of the VOs need to gather authentic proof of expenses to provide financial assistance in physical exchanges?
	А	No. To provide the lump sum to VOs, there is no need to justify expenses. However, the Partnership in charge of the VO (VOP) should request some evidence that the mobility in fact
		took place. This evidence can include e.g. hotel invoice, rent contract, boarding passes, letter from
	N /*	the HO.
# 30	-	tual Exchanges
30	<b>Q</b> A	What is a virtual exchange in CXC? CXC is foreseen to be implemented solely through physical exchanges. However, due to the
	A	current ongoing situation in Ukraine, the possibility of virtual exchanges is enabled until 31 January 2024 as a way to offer support to the Ukrainian participants who cannot take part in the physical exchanges.
		The Ukrainian partners who are currently located in the Programme's eligible countries can take part in physical exchanges, as per the standard CXC Programme rules. Thus, virtual exchanges can only be executed for those Ukrainian participants who cannot travel and thus, cannot take part in the physical exchanges.
		A virtual exchange with participation of Ukrainian partners does not have to take place in consecutive days but it must be completed within maximum three months from the first day of the exchange.
		Virtual exchanges can be counted towards the Key Performance Indicators (KPIs); however, the rules as regards the minimum duration (three working days) and maximum duration (one month) of an exchange must be respected. Virtual exchanges shorter than three working days can take place as preparatory exchanges for a physical exchange but cannot be counted towards the KPIs.
		The maximum number of virtual exchanges is limited to 10% of the Partnership's target. Therefore, if a Partnership aims to participate in 50 exchanges in CXC, only up to 5 of them can be virtual exchanges. Additionally, no hybrid exchanges are allowed. This means that the totality of an exchange must happen either physically or virtually.
		All the other rules of the CXC Programme remain the same. Thus, a virtual exchange has the same overall objectives as the physical exchange, i.e., the main goal is to boost SME competitiveness and create knowledge-transfer and capacity building for European SMEs and enable transnational cooperation among cluster members in the <b>COSME</b> programme.
31	Q	Can a visitor receive financial assistance for a virtual exchange?
	A	A visitor participant will not receive financial assistance for a virtual exchange. However, if the visitor later participates in a physical exchange, s(he) will be granted financial assistance (according to the signed Financial Agreement), provided the minimum duration/requirements are met, as set out in the calls for proposals COS-CLUSTER-2018-03-02 and COS-CLUSTER-2020- 3-03 and the respective grant agreements.
32	Q	How long is a virtual exchange?
	А	A virtual exchange with the participation of Ukrainian partners has the same length as a physical
		exchange, namely from three working days to one month. However, the virtual exchange does
		not have to take place in consecutive days but it must be completed within maximum of three months from the first day of the exchange.
#	Ot	
33	Q	What are CXC Trainings and Webinars and who can participate in them?
	A	The CXC SO regularly organises Trainings and Webinars in order to provide further assistance to
		the Partnerships in ensuring a smooth running of CXC. These are:
		1. <b>Network webinars</b> : organized for Partnerships to get to know each other better and to facilitate networking among them, to discover shared interests and diversify their planned exchanges. Partnerships will be tapped in order to have a more active role (by sharing their
		experiences) in these webinars depending on the theme of the session.



		<ol> <li>"How to" trainings: organised to share practical tips and lessons learnt in the exchange building, execution, and finalization process. Partnerships will be tapped in order to have a more active role (by sharing their experiences) in these webinars depending on the theme of the session.</li> </ol>
		3. <b>CXC IT Tool trainings</b> : organised to provide Partnerships with a better understanding of the processes of the CXC IT Tool. Trainings will be provided by the SO with the support of the
		ECCP IT team.
		The CXC Trainings and Webinars are created for Partnership coordinators and other Partnership members, and invitations are sent via email from the ECCP team.
34	Q	Where can the Partnerships find communication and dissemination materials?
	A	A <u>Repository</u> has been installed on the CXC IT Tool to store and share CXC-related communication and dissemination materials with the Partnerships administrators. The Repository contains relevant materials for the Partnerships to use in their communication and promotional activities, such as Host and Visitor brochures, CXC Communications Guidelines and templates for Word documents and PowerPoint presentations.

