



Project n. 874395 - EXXTRA

EXcellence EXchange and Teaming-up between RAilway clusters and ecosystems (ESCP-4X)

## D.5, Best Practices and key Learnings for world-class professional Clusters



Co-funded  
by the COSME programme  
of the European Union |

The content of this report represents the views of the author only and is his/her sole responsibility; it cannot be considered to reflect the views of the European Commission and/or the European Innovation Council and SMEs Executive Agency (EISMEA) or any other body of the European Union. The European Commission and the Agency do not accept any responsibility for use that may be made of the information it contains

## Table of Contents:

1. Preface .....	3
2. Methodology .....	3
3. Best practices .....	4
3.1 Analysis of the results found .....	4
3.2 Summing up .....	5
3.3 Best practices outside the ESCP-4x as long as made available.....	5
4. Key Learnings.....	7
4.1 Analysis of the results found .....	7
4.2 Summing up .....	8
5. Take away messages.....	9
5.1 Analysis of the results found.....	9
5.2 Take-away messages for the cluster community .....	9
6. Conclusion .....	10
6. Digitalisation of cluster services and activities, Cluster Excellence Denmark, page 26 and 27.....	11
7. EXXTRA open Innovation Workshop seen from a neutral observer.....	11
8. Best practices in short terms, Excel overview - see also here.....	11

## Appendices

1. European Cluster excellence programme. COS-CLUSTER -2018-03-02
2. Digitalisation of cluster services and activities, Cluster Excellence Denmark, page 26 and 27.
3. EXXTRA open Innovation Workshop seen from a neutral observer.
4. Best practices in short terms, Excel overview

## 1. Preface

What have we learned to be a better cluster for our members- and what do we have to adjust? Yes, this is the outcome to be presented in this report well halfway in the EXXTRA project and after 4 intensive Learning and Sharing workshops based on all the Learning, we have found and uncovered among our cluster members, shareholders and ecosystems in a broad context.

It has been a fruitful experience with good and useful results that each cluster (at the next stage) will implement in order to give the clusters a boost to a world-class level. It is this result that we now want to share with others in the following sections.

This report is deliberately written in a short and concise format in order to give the readers a readily availability to an extensive experience-based material in an aggregated manner. In this way, the readers are provided with a better overview of the key findings for clusters on their way to become world-class entities.

## 2. Methodology

In total, four “Learning and Sharing Workshops” have been held based on an initial member satisfaction survey sent to all cluster members. The overall questions in the survey were agreed upon by the partners and based on more general questions on themes covering cluster organisation, management, processes, and strategy. However, each survey was also tailored specifically to each clusters’ specific services and activities.

The results of the surveys provided by the cluster members, SWOT analysis and benchmark of the main services and activities provided by the partners, represent the first basis upon which four “Learning and Sharing Workshops” were settled. In those four focused key-sessions, concrete results towards real improvements in terms of professionalism and cluster organisations and managers was found by sharing and learning from each other lessons learned as from involvement of members and shareholders. The process is in its entirety described in the cluster excellence program (see app. 1).

The Covid-19 pandemic has meant that the planned physical workshops primarily have been held as online events. This has resulted in a rapid adaptation of the form of work with the development of an efficient use of the electronic interactive working methods. Thorough preparation, alternating meeting formats and external inspiration are key to successful online innovation meetings with participants across borders and cultures (see app. 2).

To get external inspiration, neutral observers have been invited and involved in the online meetings and have contributed with visual content that added another dimension to the meetings and overall theme (see app. 3).

The results of the workshops have often first been visible by the thorough and deep analysis of the whole material and in its entirety as seen in app.4.

### 3. Best practices

#### 3.1 Analysis of the results found

The Rail industry is mature and characterized by well-proven techniques, processes and methods that ensure the completion of a comprehensive transport service in a safe manner. This has developed a special business culture which, however, especially with fierce competition from other modes of transport, is under strong pressure to create up-to-date services. Here, the industry is well helped by the technological development, where IT solutions play a crucial role. This transformation in the industry must be captured by the clusters and they must take the lead to develop the industry at the forefront by using this enormous potential. Clusters in that respect have a special role as supporter, facilitator, and innovator in this business transformation by offering world class services to their members that respond to a demand/need from their members.

This context plays a role in the identified best practices used by several partners as proven valid for cluster members. They can be seen as tools to keep close contact to cluster members, and in general ensure that the cluster offers are as close to the members' wishes and business opportunities as possible.

Newsletters are the most common approach used by clusters to broadly communicate out to their members on new developments. Among the partners, the newsletters come in various frequencies varying from weekly to once a month, or when enough content has been collected. Regarding the content, this also varies from bringing information on upcoming events, innovation, project and business opportunities, member news and tender lists to name the most common ones. Newsletters can also take the format of bringing more tailormade and target group-oriented news, with the purpose of segmenting members so they only receive news that specifically are relevant for their business domain.

Events in many designs with participants from the ecosystems, are the classic membership offer and still a main driver as a popular cluster service. Industry specific, dedicated workshops as clubs/target groups where members build trust and confidence in doing innovation and business together.

In addition, as a wide range of cluster initiatives possess longer business perspectives, a positive side effect is member retention.

Development and innovation projects. Except from the many classical project offers from public organisations etc., cross-fertilization among related transportation actors and shareholders (meetings, partnerships, projects, etc.) are possible to exploit. Digital technologies as AI, Big data and Robotics are examples of widespread technologies used by diverse actors. Because of this, these technologies are open for collaboration among actors from different business areas and thereby give new and extra business opportunities. Clusters have good a position and possibilities given by their overview to act as scouts, coaches, facilitators and identifiers of potential business opportunities and collaboration partners.

Funding options are a key driver for innovation and development and should be an integral part of the cluster activities.

Support B2B business development by member competence matrixes brochures and member database of products & services, networking activities, close relations, and frequent dialogue with members. Clusters have an important task in integrating new members into the existing member base and uphold a good business atmosphere – creating a welcoming business culture. Use of online services (webinars/virtual meetings to replace physical events and meetings), for example, the development of free e-commerce platform for members.

Member services. Frequent contact with the members is crucial on the platforms used by the members. One can argue in short that clusters have the business domain and stakeholder overview, and members have the specific business expertise in their field. This fact should also be used as a one-stop-shop for members and shareholders to facilitate a close member dialogue. Share members' experiences for the learning process (also failures) and use networking as part of the social life in a cluster. The cluster secretariat capabilities are key to uphold this service which also requires allocated resources.

The special position as the cluster possess, should also be used to get in contact with stakeholders our members would never reach on their own, in order for the members to present their products and services. Furthermore, clusters play a crucial role in reaching out to specialized stakeholders and agents in approaching new markets to support SMEs' internationalisation. A part of the internalisation process, it is valuable for the members to get support for participating at common stands at international fairs, and during the fairs, the clusters also have a role in pinpointing the current business opportunities available.

### 3.2 Summing up

The main identified best practices:

- Focused and tailored information on the market and opportunities
- Support business innovation with all means
- Offer specific events and facilitate networking
- Keep close contact with the members and adapt to their needs
- Special cluster position to be used as gate openers.

### 3.3 Best practices outside the ESCP-4x as long as made available

Many European projects have identified good and Best practices often in specific industry domains, however, there are fewer concerning general cluster skills and competencies. Some of these are highlighted in the following list.

### 1. Improvement of Cluster manager skills.

Skills are improved by the training aimed at giving the participating cluster managers a deeper knowledge of Industry analysis, market segmentation and value chain analysis. The training provided an overview of the theoretical basis of these topics and the application of the most common tools.

Concepts shown valuable to gain excellent market insight. The joint training has thus helped the participants to acquire competencies for the steps and procedures of establishment value-chains and defining the value chain at cluster and industry level.

Ref. [trace-kei\\_news\\_release4\\_1st\\_joint\\_training\\_0.pdf \(clustercollaboration.eu\)](#)

### 2. Clusters of Change accelerator programme

This is a cluster accelerator programme, where participants work with their own cluster challenges in a workshop style learning setting. Including crucial keys to cluster management, how to build innovation ecosystems for systemic change, and how to apply practical tools and innovative methods to your specific cluster/ecosystem needs. The programme is based on a 7 Stepping Stones model.

Ref. Manual to download ([Bootcamp 2021 | Clusters of Change](#))

### 3. Study-visits in other territories with your members

The Study-Visits model on the basis of the INTERREG EUROPE programme has proven to be a highly interesting and very effective activity. The added value here is the fact that the partners - Clusters etc. - have to make such Study Visits with at least 1/2 of their territorial stakeholders. This makes the Study Visit highly beneficial for Cluster Managers because (a) they learn something interesting and useful from other territories (b) they can look at such experiences both through their lenses and through their stakeholders' (e.g. the visit of an Accelerator or a Research Center or an innovative company with one of your SMEs will help you better understand their point of views, but at the same time your SMEs will better understand the type of job you are doing for them in the Cluster.

Ref. <https://www.interregeurope.eu/record/>

### 4. Offer service to deploy Workplace Innovation in SMEs

The Workplace Innovation concept at the basis of the RailActivation project has proven to be a highly interesting field ensuring SMEs to untap their innovation potential in the workplace through new work approaches, new ways of sharing ideas, new methodologies in the processes - all based on human beings' behaviours. This knowledge offers a clue to the Cluster Managers for including, among their services, the support towards Workplace Innovation in SMEs.

Ref. <https://cordis.europa.eu/project/id/861887>

### 5. Development of regional strength positions

When cluster organisations and innovation Networks has the sufficient tools to work professionally and strategically to offer support for SME's and universities/knowledge institutions in their joint effort regarding research and innovation in the triple helix dialogue, the economic development in the region will benefit. Mutual beneficial knowledge sharing activities across stakeholders from different regions at policy and operating levels give clusters excellent insights and opportunities.

Ref. <https://www.interregeurope.eu/p2l2/>

## 6. Innovation Support Measures

In the Interreg- project Northern -connections a Toolbox has been developed. The central focus of the box/ catalogue is the method collection. Here you can read what each method is about, and what each requires in terms of preparation, practical execution and follow-up. The catalogue has been developed with inspiration from and collaboration with Cluster Excellence Denmark. In addition to their thorough work with a round of interviews among members of Innovation Network Denmark and partnerships, the Northern Connections partners have selected their top picks from the Handbook for Matchmakers and added their own favourite innovation measures.

Ref. [20180419111418\\_northern-connections-toolbox-v10.pdf \(northsearegion.eu\)](#)

## 4. Key Learnings

### 4.1 Analysis of the results found

The Learning and Sharing process has clarified a number of activities and methods that are central to being able to conduct world-class cluster business. Not surprising effective tools in handling business relations in all aspects are necessary.

#### CRM system

It is of paramount importance to have an effective system to help the cluster management optimize the available resources and obtain a collected overview of their members. An effective CRM system can provide an overview of members, e.g., their contact information, primary contact person within the organisation, previous dialogues with cluster employees, and can also show information about involvement in cluster activities as events and projects. This way, it is clear for all employees in the cluster secretariat, and not only knowledge for a specific employee with the most frequent dialogue with a specific member.

It has the clear advantage of increasing the resilience within the cluster management, as staff turnover becomes less of a problem when all have access to key information on all members. Seen from this perspective, a well-managed CRM system increases organisational robustness. Additionally, for clusters with more than one domain/member segments to handle, it is easier to handle segmented communication so only relevant information will be received by the members. To sum up, a CRM system is a key instrument for all clusters with the ambition of becoming world-class.

Online services. The pandemic has in the hard way taught us member online services have come to stay. The tools are still being developed with several services which have also proved effective as the whole cluster community becomes familiar with the platform.

Industry database - value-added with digital solutions. The request for getting an overview with short notice has grown soon to become a basic cluster member service.

This Industry database should be refined with further refinement of member competencies and capabilities to ease the process of finding relevant business partners. In that respect, a Trade directory with digitized online access is requested. Establishment, operation and maintenance could be developed with a payment model.

Especially the current Covid pandemic has shown the need to establish alternatives to physical matchmaking and the on-line B2B matchmaking platform has proven its value.

The Fairs are king, yes meet the customers physical is always the best way to do business. Even the most sophisticated online event cannot replace it. But it can prepare for business and be attractive for long-distance opportunities, where B2B with local partner support can be an effective way of doing the first screening of partners and market.

Internationalisation. As mentioned in the section on the special position that clusters hold, internationalisation is an embedded part of clusters' DNA. International events and participation in fairs, pose an opportunity for clusters to showcase their members' capabilities and utilize the clusters' contacts to connect members with potential business and collaboration partners, as well as other current stakeholders. Due to clusters' special position, they are integrated in the larger ecosystem and therefore have a wide range of contacts. Additionally, clusters are better suited to reach out to support environments e.g., local entities as agencies and embassies etc. By organising joint stands facilities, also has the positive side-effect of enabling the participation by smaller entities as the costs become more bearable.

## 4.2 Summing up

The main identified key learnings:

- A well-functioning CRM system is a must for a professional cluster organisation.
- Online services have been the key to success during Covid-19 and will remain as a natural business platform.
- The Fairs are still the king to offer the members business opportunities also at the international level.

## 5. Take away messages

### 5.1 Analysis of the results found

Clusters must have an entrepreneurial culture - no matter they are public-funded or non-profit. It is of paramount importance for the clusters to be proactive and take lead based on the necessary intelligence you collect and get from the overall ecosystem network activities. This knowledge must be transformed into more business-oriented opportunities that can stimulate the cluster activities. Thus, the clusters have a task in operationalizing the business opportunities into concrete actions where members can exploit the opportunities.

Close to business activities and innovation. Close relations to your cluster members and member involvement by support to members e.g., in consortium creation are just some ways to engage members and retain them in the cluster. Service and business close development on virtual platforms have become even more relevant.

Although clusters mostly are non-profit organisations, it is a struggle to get the right match in funding where the cluster obtains its freedom to follow its development strategy and therefore needs to create income from its activities by for example turning cost driver to business driver activities (like in specific competence building activities).

Clusters are typically agile in their business attitude due to the flexible and limited production platforms they use. They must think out-of-the-box. So, addressing cross-sectoral innovation with heterogeneous members and clusters is getting a still more open possibility also by using the digital transformation as a cross-regional/sectoral driver. All in all, this out-of-the-box thinking can lead to valuable member support.

If anything, it is the employees that are crucial to a cluster's success. To develop and maintain a successful cluster, it is important to possess a professional Human Resource Management (HRM) system. Creation of career ladders etc., systematically supported regular employee development interviews are key to create the spirit for running successful clusters with the necessary long sight.

This could also reduce staff turnover among key personnel and thereby the loss of competencies within the management team.

### 5.2 Take-away messages for the cluster community

Clusters are placed in crossroads where ideas and opportunities are translated into business opportunities. The clusters also feel the ever-increasing demands to be able to provide their best in order to meet the satisfaction of their members, this often with limited resources.

In the broad perspective, this clarifies a number of issues that the clusters need to be strong in:

Cluster Management delivery capacity. There are many dimensions that must be top tuned in order to continuously deliver relevant and attractive business opportunities. During the pandemic, it has become clear that intensive and creative use of IT platforms are of paramount importance in order to reach members with result-creating activities (e.g., B2B and matchmaking meetings, online events with strong business content etc.).

Business development. The effective business development process, more transparency among members' capabilities and help to establish consortium for tenders are examples of the current member demand.

Internationalisation. All companies with a website are instantly part of the international business environment and should take this into account. Addressing international markets requires, especially for SMEs, support and even tailored help. Via their special position, clusters play an important role in the internalization activities.

Innovation. To take part in innovation projects and initiatives, it requires support and knowledge of where to find sources for funding, which often is a scarce asset in most clusters and for their members. Therefore, there is a gap to be filled out by the clusters, and the funding element must therefore be included in cluster activities as a natural element. The UN SDG as an example must be unfolded as a project frame where clusters can operate and mature project possibilities including support for creation of partner consortium to lift the possibilities. It pinpoints the need to get better in monitoring for funding possibilities e.g. EU project funding opportunities.

Business culture. Trust is key. Network building on trust is an essential tool to find attractive places in the market. Clusters must help in creation of "business zones" where participants can share knowledge and sensitive information and dare to do business together with a stronger impact as a result. Clusters play a vital role in creating this trustful environment utilizing their knowledge of the various members and their special capabilities and competencies.

## 6. Conclusion

With this report's broadly fact and real market-based experience and knowledge of developing clusters to higher performance, a strong foundation has been created towards the implementation of new strategies and roadmaps that lead to world-class clusters for the next steps of the EXXTRA project.

The best practices, key learnings and take-away messages are operative and give an updated toolbox for cluster managers to bring into play adapted to the status of the specific cluster.

## Appendices

5. European Cluster excellence programme. COS-CLUSTER -2018-03-02

6. Digitalisation of cluster services and activities, Cluster Excellence Denmark, page 26 and 27.

7. EXXTRA open Innovation Workshop seen from a neutral observer.

8. Best practices in short terms, Excel overview - see also here





**Annex 1 to the Grant Agreement – Part B  
(Description of the Action)**

**COSME**

**European Cluster Excellence Programme**

**COS-CLUSTER-2018-03-02**

<b>Project acronym:</b>	<b>EXXTRA (EXcellence EXchange and Teaming-up between Railway clusters and ecosystems)</b>
<b>Project duration (months):</b>	<b>24 months</b>
<b>Coordinating organisation:</b>	<b>DITECFER S.c.ar.l.</b>
<b>Number of partners:</b>	<b>7</b>

## Work Package 2. DEVELOPMENT OF CLUSTERS MANAGEMENT SKILLS, CLUSTERS STRATEGY AND LEARNING

### WP.2.1 Objectives of the Work Package

To develop a program of benchmarking, sharing & learning, competence-transfer, discovery process, towards the professionalization of Clusters management both in terms of services and individual Cluster Strategy and Implementation Roadmap development/update.

To identify new objectives, methodologies and tools to enlarge Clusters' operational scope in the interest of their members and their ecosystems.

As result of this, to achieve:

- the development/update of individual Cluster Strategies;
- the next level of ESCA Cluster Management Excellence Label for the Partners being already awarded and to achieve the ESCA Cluster Management Excellence Label for the Partners that have not applied yet.

### WP.2.2 Description of the Work Package

#### WP LEADER: CEN SEC (DK)

The WP aims to cover all Strategy, Organisational and Operational Management aspects having impact on the professionalization of the Partners as world-class Clusters and the quality of their services, being this the pre-condition for delivering to their members added-value and customized services with real and measurable impact in terms of growth, and competitiveness.

The WP is composed by a series of Tasks representing the main *drivers* for Cluster Management and Organisations to grow in capacity and quality and in capability to support their members acquiring the necessary skills, engaging in transformation processes, taking up new solutions, growing within the value chains. All Tasks are coordinated under the Leadership of CEN SEC, that will (*in chronological order*):

#### WP CROSS-TASKS ACTIONS – LEADER: CEN SEC (DK)

- guarantee the coordinated design and implementation of all the Tasks in order to make of them a consistent path composed by several “**Learning & Sharing Workshops**” (*Milestone*) dedicated to all the topics covered by this WP;
- prepare, with the support of the Partners, an **online Survey template for Partners Cluster members** (GDPR compliant) in order to assess the current quality / effectiveness of Clusters' support and services and room for improvement;
- gather all relevant information from the Partners and from surveys results to draft a “**SWOT analysis and benchmark of the main services currently provided by the Partners and of modalities they are channelled to the members**” (*Deliverable*);
- overlook the development/update of **each Partner's individual Cluster Strategy and Implementation Roadmap** (*Deliverables*) aimed to better support the growth and the competitiveness of members in the era of industrial transformation 4.0, railway digitalisation, circular economy;
- overlook the **organisation at each Partner of a conference to present** to its members and ecosystem's actors **the new/revised Cluster Strategy and Implementation Roadmap** drafted also following their contributions (*Milestone*);

- overlook Partners' applications (*Milestone*) for Audit and Assessment in view of “**ESCA Cluster Management Excellence Label**”, having to lead them to a new or to a higher-level Label;
- guarantee the transformation of all learnings into a “**Best Practices and Key-Learnings for World-Class Professional Clusters**” (*Public Deliverable*) that will be made public to help not only the Partners but the entire Cluster Community in Europe to continuously grow in professionalisation and capability to create impact for their members and their ecosystems. The document will provide (disclosable) information and operational details about the services currently provided by the Partners and that, during the “*Learning & Sharing Workshops*”, the Partners will have voted – after discussion – as their top “Best Practices”. A dedicated Chapter will also be devoted to a short-list of “Best practices from outside the ESCP-4x” deriving from EU funded projects as long as made available (e.g. previous Cluster Excellence, INTERREG EUROPE, H2020-INNOSUP, etc.).

The Surveys to Clusters' members and “SWOT analysis and benchmark of the main services currently provided by the Partners and of modalities they are channelled to the members” will represent the first action to be realised, upon which the “*Sharing & Learning Workshops*” will be organised. For this reason, CEN SEC will share the results of this Deliverable with the Task Leaders in order to develop with them the contents and approach of the ‘lessons’ of the “*Sharing & Learning Workshops*”, according to each Task Leader's competence.

The “*Learning & Sharing Workshops*” will be organised in 4 key-sessions, as follows:

**Table 8 | "Learning & Sharing Workshops" in 4 key-sessions**

#1 Focus Session	#2 Focus Session	#3 Session on the territories	#4 Final Plenary Session
Cluster Management, Strategy and Organisation	Internationalization Services	Discovery process towards a third new Clusters key-service - Part B: Partners meet up with the actors of their ecosystems to (A) share with them the key-findings of the Focus Sessions #1 and #2; (B) gather inputs about gaps, needs, tools.	What the ecosystems say and suggest: further regional and cross-regional opportunities?
Innovation Services	Discovery process towards a third new Clusters key-service - Part A		Wrap-up towards the individual Cluster Strategy drafting/updating process and towards the EXXTRA Partnership Joint Strategy.

The Sessions #1 #2 #4 will see all Partners meeting in a European city for 2 days' work each.

The Session #3 on the territories will consist of 1-day workshops each Partner will have to organise in its territory, involving its members, its ecosystem stakeholders and other potentially relevant stakeholders (e.g. actors on the territory having been partners of EU funded projects targeting the same objective under - e.g. - INTERREG EUROPE and H2020-INNOSUP programs). The work will be organised in Focus Groups to identify new opportunities, methodologies and tools to implement.

\*\*\*

**The above described and following activities have been chosen because** expected to provide *concrete* results towards a *real* improvement in terms of professionalisation of Cluster Organisations and Managers. This can be reached thanks to:

- a shared design-process of the *Learning & Sharing Workshops* between the WP Leader and the Task Leaders;
- the active participation of all Partners in terms of: presentations of their services and availability to open discussion on them; involvement of their members in the Survey on current Cluster services provided; involvement of their members in the realization of the testimonial-videos; involvement of their members and ecosystems' stakeholders in the Worskhop #3 for “Discovery process”; organisation of a conference at each Clusters' to

present the new/revised Cluster Strategy and Implementation Roadmap and to show how the inputs gathered also bottom-up from their members and ecosystem have been taken into consideration;

- concrete learnings that all Partners will take home;
- planned concrete actions as visible outputs for each Partner: the development/update of their individual Cluster Strategy and Implementation Roadmap; the application for the Audit towards ESCA Cluster Management Excellence Label (scale-up to the next level or first award);
- a planned overall document - *“Best Practices and Key-Learnings for World-Class Professional Clusters* - with *best practices*, key learnings and *take-away* messages for the Partners and the entire Clusters community.

\*\*\*

### **TASK 2.1 – LEADER: CEN SEC (DK)**

**Cluster organization, management, working methodologies, workplace innovation, strategic approach, approach towards members, methodologies to engage SMEs, self-sustainability of the Cluster organisation, individual Cluster Strategy and Implementation Roadmap development/update.**

This set of “*Sharing&Learning Workshops*” will cover all the topics affecting Clusters capability, e.g.:

- to develop a clear Strategy with KPIs and to implement it following a clear Roadmap, establishing a Financial controlling system and continuous-review mechanisms to follow context/market/technological changes;
- to perform their mission having the best management skills not just for today but also for changing contexts, thanks to life-long learning;
- to perform their mission paying attention to organisational aspects such as working methodologies, processes, policies;
- to improve the capability to engage their members.

The Workshops will follow an interactive method, where the Partners are firstly requested to present their organisational structure, Strategy, members’ engagement methods, etc. to the other; to each presentation all the other Partners will ‘react’ providing a feedback to their peer. CEN SEC will then present the results of the “SWOT Analysis and Benchmark” to provide further elements for discussion. Then, after having ‘voted’ the top best practices, the Partners will engage in active exercises, simulations, etc. pushing the Cluster Managers *‘out of their comfort zone’*, so to help them see things differently.

In developing the learning module, CEN SEC will also take into account possible other best practices in other Clusters and/or deriving from EU funded projects.

All the learnings deriving from this Task will be taken into account not only for developing/updating the Clusters individual Strategies and Implementation Roadmaps rather also for developing the Joint Strategy of the EXXTRA Partnership (WP3).

### **TASK 2.2 – LEADER: RAIL GRUP (ES)**

**Professionalization of Innovation services delivered**

This set of “*Sharing&Learning Workshops*” will cover all the topics affecting the Clusters capability, e.g.:

- to design professional services aiming to support Innovation processes (product innovation, process innovation, workplace innovation, etc.) in their members;
- to approach the service design process under a mix of *bottom-up* approach (following concrete needs from members) and *top-down* approach (capitalising on Clusters’ foresight role and capability to anticipate needs);

- to promote and deliver services using methodologies able to engage a wider number of members;
- to promote cross-learnings between members in the innovation area as part of the service delivery;
- to deliver services providing a measurable impact for the members.

The Workshops will follow an interactive method, where the Partners are firstly requested to present the Innovation services they deliver, the best results achieved by members through them, the methodologies followed to design and channel them, etc..

Each Partner will have to realise for this part of Workshops 1 home-made video long no more than 2.5 minutes where 3 Cluster members (of which at least 2 SMEs) having benefited from Innovation services answer to the key-questions<sup>16</sup>: (A) *what type of Innovation service did you benefit from?* (B) *did you receive the expected result from it?* (C) *was the service requested by you (bottom-up) or was your Cluster organisation to assess useful for you to engage with that service (top-down)?* (D) *did you find easy the process to identify the right service for you?* (E) *how do you rate the quality/cost ratio?* (F) *how do you rate your overall experience?*

To each presentation and video all the other Partners will 'react' providing a feedback to their peer. RAIL GRUP will then present the results of the "SWOT Analysis and Benchmark" to provide further elements for discussion. Then, after having 'voted' the top best practices, the Partners will engage in active exercises, simulations, etc. pushing the Cluster Managers 'out of their comfort zone', so to help them see things differently.

In developing the learning module, RAIL GRUP will also take into account possible other best practices in other Clusters and/or deriving from EU funded projects.

After Session #2 of the "*Learning & Sharing Workshops*", each Partner will organise a pro-active meeting on its territory with its ecosystem's stakeholders to present (also) the key-findings of Focus Session #1 on Innovation services in order to gather comments and suggestions and to make emerge unanswered needs.

All the learnings deriving from this Task will be taken into account not only for developing/updating the Clusters individual Strategies and Implementation Roadmaps rather also for developing the Joint Strategy of the EXXTRA Partnership (WP3).

### **TASK 2.3 – LEADER: DITECFER (IT)**

#### **Professionalization of Internationalization services delivered**

This set of "*Sharing&Learning Workshops*" will cover all the topics affecting the Clusters capability, e.g.:

- to design professional services aiming to support Internationalization of their members in countries inside EU and outside EU;
- to approach the service design process under a mix of *bottom-up* approach (following specific visions of their members) and *top-down* approach (capitalising on Clusters' capability to realise market analysis taking into consideration SMEs needs and capabilities as value-chain, capitalising on Clusters' capability to operate on a world-scale and to engage in international collaborations both directly and through EU-funded tools for internationalization such as "EU Gateway - Business Avenues", "ENRICH in USA", "EEN", etc.);
- to promote and deliver services using methodologies able to engage a wider number of members;
- to promote cross-learnings between members in the internationalization area as part of the service delivery;

<sup>16</sup> Possible fine-tuning of questions may apply when implementing the project. In any case, the same questions will apply to all Partners.

- to deliver services providing a measurable impact for the members.

The Workshop will follow an interactive method, where the Partners are firstly requested to present the Internationalization services they deliver, the best results achieved by members through them, the methodologies followed to design and channel them, etc..

Each Partner will have to realise for this part of Workshops 1 home-made video long no more than 2.5 minutes where 3 SMEs that are Cluster members having benefited from Internationalization services answer to the key-questions<sup>17</sup>: (A) *what type of Internationalization service did you benefit from?* (B) *did you receive the expected result from it?* (C) *was the service requested by you (bottom-up) or was your Cluster organisation to assess useful for you to engage with that service (top-down)?* (D) *was the service delivered specifically for you or was it a group-service?* (E) *did you find the process of engagement easy enough?* (F) *how do you rate the quality/cost ratio?* (G) *how do you rate your overall experience?*

To each presentation and video all the other Partners will 'react' providing a feedback to their peer. DITECFER will then present the results of the "SWOT Analysis and Benchmark" to provide further elements for discussion. Then, after having 'voted' the top best practices, the Partners will engage in active exercises, simulations, etc. pushing the Cluster Managers 'out of their comfort zone', so to help them see things differently.

In developing the learning module, DITECFER will take into account best practices from the ESCP-4i "PERES" it has been coordinating and from the ESCP-4i "KETs4Dual-Use" involving the Partner CEN SEC.

After Session #2 of the "Learning & Sharing Workshops", each Partner will organise a pro-active meeting on its territory with its ecosystem's stakeholders to present (also) the key-findings of Focus Session #2 dedicated to Internationalization in order to gather comments and suggestions and to make emerge unanswered needs.

All the learnings deriving from this Task will be taken into account not only for developing/updating the Clusters individual Strategies and Implementation Roadmaps rather also for developing the Joint Strategy of the EXXTRA Partnership (WP3).

#### **TASK 2.4 – LEADER: I-TRANS (FR)**

##### **Identification of a new key-service for each Partner to be delivered to its members**

This set of "Sharing&Learning Workshops" will cover the "Discovery process" at Clusters towards the identification of a new key-service for each Partners and how to design it and channel it.

The Task is composed by 2 Parts:

✓ **PART A** - Workshop with all Partners Cluster Managers where:

- I-TRANS will present possible ideas of services discovered in EU-funded projects or in other ESCA Labelled Clusters;
- each Partner will be requested to present the most performing service it is providing according to the results of the SWOT Analysis, *not* related to *Innovation services* nor to *Internationalization services*.

After each presentation the Partners will have the possibility to ask some more details. At the end of all presentations, the general discussion will start.

<sup>17</sup> Possible fine-tuning of questions may apply when implementing the project. In any case, the same questions will apply to all Partners.

**PART B - Workshop on the Partners' territories with ecosystem's stakeholders**

After PART A, each Partner will organise a pro-active meeting on its territory with its ecosystem's stakeholders to present the key-findings of PART A in order to gather inputs, requests, gaps in the ecosystem, etc.. The Focus Group methodology will follow the "Entrepreneurial Discovery process<sup>18</sup>" approach already used for S3 activities on the territories, tailored to the purpose of discovery of new services/tasks each Cluster should provide to fully answer their territory's needs.

The outputs deriving from PART B will be reported by each Cluster in the Session #4 of the "Learning & Sharing Workshops". A discussion will follow to help identify regional and possibly cross-regional opportunities.

All the learnings deriving from this Task will be taken into account not only for developing/updating the Clusters individual Strategies and Implementation Roadmaps rather also for developing the Joint Strategy of the EXXTRA Partnership (WP3).

**WP.2.3 Participants Involved in the Work Package**

Participant No	Role	Main tasks	WP Effort (persons/month)
2 – CEN SEC	WP Leader, 2.1 Task Leader, Partner of Tasks 2.2, 2.3, 2.4	Management of WP2 Management of Task 2.1 Active participation to activities under Tasks 2.1, 2.2, 2.3, 2.4 Developing/Updating of the Cluster Strategy and Implementation Roadmap under Task 2.1	2,2
6 - RAILGRUP	2.2 Task Leader	Management of Task 2.2 Active participation to activities under Tasks 2.1, 2.2, 2.3, 2.4 Developing/Updating of the Cluster Strategy and Implementation Roadmap under Task 2.1	1,13
1 - DITECFER	2.3 Task Leader	Management of Task 2.3 Active participation to activities under Tasks 2.1, 2.2, 2.3, 2.4 Developing/Updating of the Cluster Strategy and Implementation Roadmap under Task 2.1	1,3

<sup>18</sup> <http://s3platform.jrc.ec.europa.eu/entrepreneurial-discovery-edp>

4 - I-TRANS	2.4 Task Leader	Management of Task 2.4 Active participation to activities under Tasks 2.1, 2.2, 2.3, 2.4 Developing/Updating of the Cluster Strategy and Implementation Roadmap under Task 2.1	1,3
3 – BTS	WP Partner	Active participation to activities under Tasks 2.1, 2.2, 2.3, 2.4 Developing/Updating of the Cluster Strategy and Implementation Roadmap under Task 2.1	0,2
5 - MAFEX	WP Partner	Active participation to activities under Tasks 2.1, 2.2, 2.3, 2.4 Developing/Updating of the Cluster Strategy and Implementation Roadmap under Task 2.1	1
7 - ARUS	WP Partner	Active participation to activities under Tasks 2.1, 2.2, 2.3, 2.4 Developing/Updating of the Cluster Strategy and Implementation Roadmap under Task 2.1	Not budgeted

#### WP.2.4 Subcontracting

The WP Leader and Tasks Leaders may opt to rent an external Consultant to facilitate discussions and analysis during the “*Learning & Sharing Workshops*” in order to help the Partners better focus on their improvement process, to get outside their ‘comfort zones’, etc..

The contractor will be selected through open procedure applying MEAT criterion.

#### WP.2.5 Performance Indicators

List the indicators used to measure the implementation of this work package by making the link with section 1.4

Title	Brief Description	Target (quantity)
<i>Number of Learning and Sharing Workshops involving all Partners</i>	<i>Pro-active Workshops where, under leadership of Task Leaders and possible participation of third relevant “witnesses”, Partners learn from others, are taught best practices, discuss what</i>	4

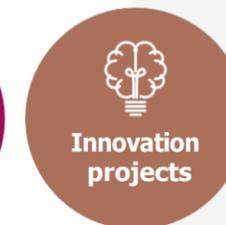
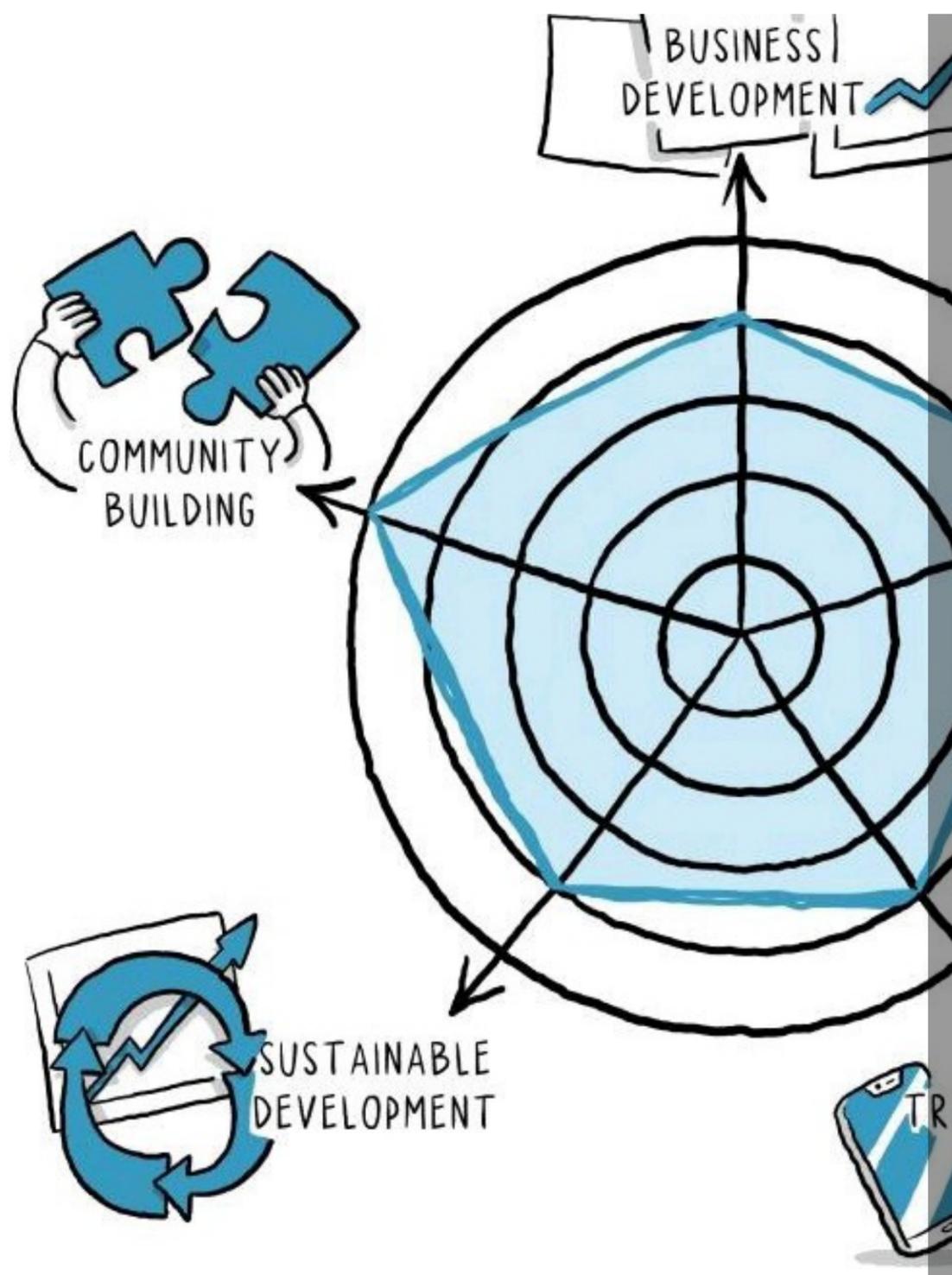
	<i>could fit to them and what the possible obstacles to implementation, discover new opportunities of services to be delivered to their members</i>	
<i>Number of Cluster members and ecosystems stakeholders involved in the WP activities</i>	<p>A) <i>Min 7members*7Partners answering the Survey.</i></p> <p>B) <i>3 members+7Partners as testimonials in the Videos.</i></p> <p>C) <i>Min 15 among members and ecosystems actors*7Partners involved in Session #3 of the “Sharing &amp; Learning Workshops”.</i></p> <p>D) <i>Min 25 among members and ecosystems actors*7Partners participating at the Cluster conference to present the new/revised Cluster Strategy and Implementation Roadmap.</i></p>	<p>A) = 49</p> <p>B) = 21</p> <p>C) = 105</p> <p>D) = 175</p> <p>Total = 350</p>
<i>Number of individual Cluster Strategies developed (new) or updated and Implementation Roadmaps</i>	<i>The learning process under WP2 will result in Partners developing/updating their Cluster Strategies and Implementation Roadmaps.</i>	7

### WP.2.6 Planned effort

- *Proposals must include an aggregated overview on planned efforts (person-months). To facilitate the reading of the table, it is important to break-down the project. Please follow the structure below:*

<b>Start month:</b>	T1	<b>End month:</b>	T24
<b>Participant No</b>	<b>Role</b>	<b>Total person-months</b>	
2 – CEN SEC	WP Coordinator - Director Business Networks	2,2	
6 – RAIL GRUP	Task 2.2 Leader – Cluster Manager	1	
6 – RAIL GRUP	Task 2.2 Support – Project Manager	0,13	
1 – DITECFER	Task 2.3 Leader – Cluster Manager	0,7	
1 – DITECFER	Task 2.3 Support – Business Development	0,4	
1 – DITECFER	Task 2.3 Support – Marketing	0,2	
4 – I-TRANS	Task 2.4 Leader – International Projects Manager	1	
4 – I-TRANS	Task 2.4 Support – Communication	0,3	
2 – BTS	WP Partner – Cluster Manager	0,2	

5 – MAFEX	WP Partner – Competitiveness and Innovation	0,56
5 – MAFEX	WP Partner – Marketing	0,44
7 – ARUS	WP Partner – Cluster Manager	Not budgeted



# Open Innovation Workshop

Through an open Innovation Workshop, CenSec has tested methods for long online formats. Thorough preparation, alternating meeting formats and external inspiration are key to successful innovation meetings online with participants across borders and cultures.

## Concept: Long online workshops with varied formats

The Open Innovation Workshop should have been held physically over two days with participants from Denmark, Germany, France, Spain, Italy and Turkey. Due to covid-19 crisis travel restrictions, the event was transformed into an online innovation workshop for the project partners. The online Open Innovation Workshop was held over two days for four hours at a time – a rather intensive format for online meetings. CenSec managed the organisation and facilitation of the workshop.

Long online formats can be difficult to get through for participants, and therefore CenSec operated with a variety of different formats to break up the sessions. In addition to the project partners' own presentations, external speakers and facilitators were invited.

Among other things, the external facilitators were assigned to coach participants, to stimulate and facilitate knowledge sharing. The external facilitators participated throughout the workshop, on the first day mostly in a listening mode to get an understanding of

**CASE**  
**Open Innovation Workshop**

the context. On the second day, they helped facilitate a brainstorming session for the project participants. It was all visualised in two live graphics – one about the participating partners and one about their current challenges – as testimony to the workshop’s discussions and learnings.

**Participant involvement:**  
**Thorough preparation, SWOT analyses and interviews**

One disadvantage of digital events seems to be that it can be difficult to get into depth with an advanced subject matter. To make the most of the online Open Innovation Workshop, the project partners – seven cluster organisations from six countries – had prepared very thoroughly.

All seven project partners had carried out membership studies in advance. Based on input from the project partners, CenSec produced comprehensive SWOT analyses. During the event, a total of 21 companies from six countries provided their input via recorded video interviews. Each interview lasted five or seven minutes, and all companies answered the same questions.

**Technology: Teams, Base Camp and videos**

The online innovation workshop itself was held in Teams. The advantage of Teams is that the technology is integrated into the Office

package so virtually everyone has access to it. Teams is reliable and relatively intuitive to use even when showing videos. However, some experience trouble having multiple documents open at the same time and switching between documents.

The thorough preparation with member surveys and SWOT analyses has produced a lot of material to keep track of. To handle the many materials before, during and after the Open Innovation Workshop, the system Base Camp – an online project management system – was used.

The video interviews with the companies were recorded using Microsoft Teams and edited in Adobe Premiere Pro and Adobe After Effects, respectively.

**Evaluation: Experience and learning shared internally**

The innovation workshop is part of a larger project. Thus, the concept has not yet been evaluated. However, the learning from the workshop has been shared between the partners in order to use it in other innovation workshops in the project. Also, the learning from the workshop, the SWOT analyses and the speakers will be translated into concrete organisational changes among project partners.

**Virtual vs physical: Varied formats important online**

- Virtual meetings are often intensive. Varied formats are key to holding successful long workshops online.
- Several employees in the organisations involved can participate as there are no travel costs associated with online workshops.

- An online meeting has fewer travel activities and makes it easier to meet with international partners.

**Learning/tips:**

- Thorough preparation helps to give weight to the content of meetings so that you can go into many challenges in depth in a short time.
- A project meeting has been held physically earlier on. At online meetings it is harder to go in depth with the theme and network with each other compared to physical meetings.

When the online event extends over two days, you get a better understanding of the group of participants. This knowledge can be used and adapted to the next day. In this case, there was a tight concept on the first day while the concept for day two was more informal. The different formats gave different dynamics.

**EXXTRA** *Open Innovation Workshop was held as part of the EU project EXXTRA. EXXTRA focuses on facilitating cooperation within the railway industry. Partners are DITECFER (Italy), CenSec (Denmark), BTS Rail Saxony (Germany), i-Trans (France), MAFEX (Spain), RailGrup (Spain), Arus (Turkey).*



For more information, please contact

Poul-Erik Hansen  
 Director Business Networks, CenSec

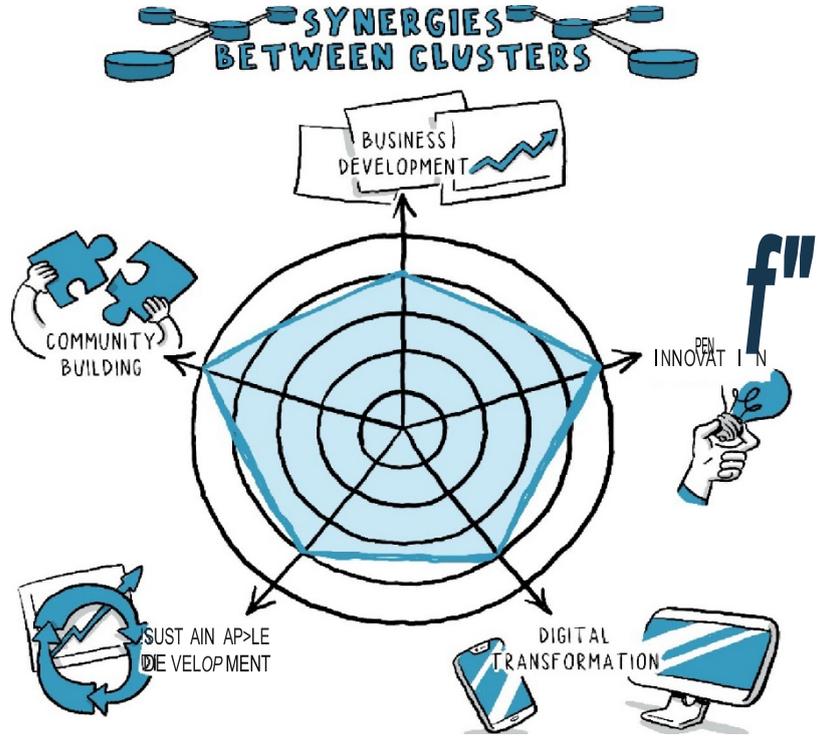
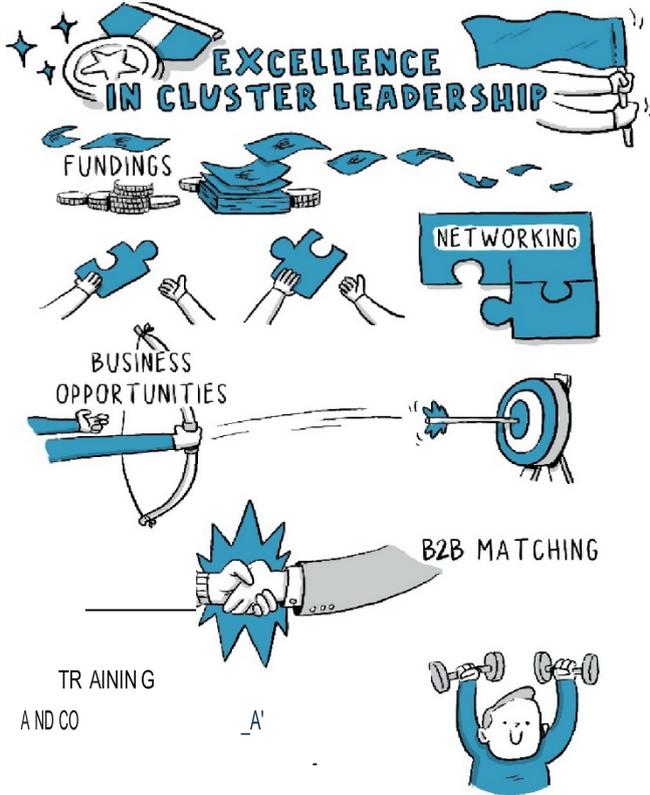
Sofie Jensen  
 Project Manager, CenSec

READ MORE  
**HER**

# EXXTRA OPEN INNOVATION WORKSHOP

## SWOT ANALYSIS

ns DTECFER c e n.Sec @ ARDS BT/S EX r allgt>UP



Live visual summary made by: [connectingbrains\\*](#)

# EXXTRA OPEN INNOVATION WORKSHOP

## SWOT ANALYSIS

Censec

©

BT/S Rail Saxony

ENGAGEMENTS IN PROJECT OPPORTUNITIES

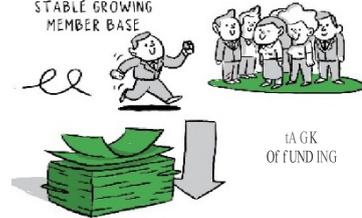


FOLLOW UP WITH NEW TECH OPPORTUNITIES



INFORM FOCUSED ABOUT BUSINESS OPPORTUNITIES IN THE CLUSTER

STABLE GROWING MEMBER BASE



LACK OF FUNDING

TECFER

BROAD KNOWLEDGE



AND PARTICIPATE IN CLUSTER ACTIVITIES

PARTICIPATION IN CLUSTERS WORKING GROUPS, WEBINARS, ETC



DECLINING SATISFACTION WITH CLUSTER MANAGEMENT

TECFER

PURSUING INNOVATIVE SOLUTIONS IN CORE BUSINESS

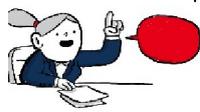
960 a //g9 up

INTEGRATION WITH UNIVERSITY ACTIVITIES



{21;

SHOULD THEN CONTACT RESEARCH



MORE FACTOR INFORMATION AND ABOUT ECONOMICALLY REQUESTED



LITTLE KNOWLEDGE AND COMPETENCE AMONG MEMBERS

## IES PIACT



	DITECFER	CENSEC	RAB-S	I-TRANS	MAFEX	RABGRUP	ARUS	CLUSTER COMMUNITY
Best Practices based on surveys, swots, discovery process and workshops	Weekly newsletter with focus on specific member	Tender overview and newsletter	News letter	Monthly newsletter	Weekly newsletters	Frequent member contacts	Three years roadmap with planning of central activities as: trade delegations, training, innovation, projects	
	Database with member products	Use of online services (webinars to replace physical events and meetings)	Tailormade information for events	Tailored emails to members about events and innovation opportunities.	Mafex magasin, monthly	Hotline, mail and activity newsletter	Start to free E-commerce platform membership for members	
		Close relationship with memberbase, by frequent dialog	Target group oriented activities/eg. Innovation services and export promotion.	Dedicated workshops on innovation opportunities. Club activities on specific topics	Webinars on internationalisation and innovation topics	Virtual workgroup meetings, ex. Int. Tenders and CBM		
	Close relationship with members, by direct frequent dialogue and always available 'hot line' (phone, whatsapp)	Events seminars and workshops (eventually B2B)	Networking events with nice setting/feel good social atmosphere, comfortzone creation.	Crossfertilisation among related transportation actors and shareholders. (meetings, partnerships, projects, etc.)	B2B meetings physical and virtual incl. Stakeholders	Seminars with experts		
	Select specialised agents in approaching markets to support SMEs' internationalisation		Welcoming business culture adapted to railway culture and member profile.			Innovation scouting activities to enhance innovation and lead to a competitive advantage.		
	Share members' experiences for learning process (above all failures)							
	Obtain interviews for our members with people they would never reach, to present their products							
	Summer Reception (networking + funding)							
Clusters as partner search one-stop-shop for own members								
Key Learnings based on L & S workshops	"The fairs are king"	CRM system (management of members, events and projects)	CRM system	Member communication of own services	Payment bearing on quality activities	Specific help to members	lobbying activities (from top to bottom)	
	Innovation- invest to remain leader	Adaption to online services	Industry database -value added with digital solutions.	Clarify member services to be more business close	Use business opportunities at international fairs	Foster SME competitiveness	Lock of funding model	
	Need for a CRM for a better members' management, and ERP system for a smoother cluster and projects management	Industry database (further refinement of member competencies and capabilities)	Trade directory with digitized on-line access with payment model.	Need for a CRM system	Tailored business services	Assist member internationalisation		
	Quality – Cost – Delivery Time => key criteria for a member to assess cluster services	Online member B2B platform (gated internal platform for members)	B2B matchmaking platform	Need to create payment bearing on quality activities.	Communication between Mafex and European rail authorities	Make quick results (members want this)		
	Personalisation of services on members: requires more effort but it's the best way to build growth and satisfaction	Business by trust (consortium projects)	Use of "canvas model" as a strategy tool			Personalised service to members.		
		UN SDG as project frame						
Take-away messages based on L & S workshops	Clusters must have entrepreneurial culture - no matter they are public-funded or no profit	From costdriver to businessdriver activities	Digital transformation as a cross regional driver	Business close activities also in innovation offers	Communication and involvement with members	Engage members to keep them	Communication with members	Cluster Management delivery capacity
	Focus less on 'outputs' and more on 'outcomes' of clusters' actions		Cross sectoral innovation with heterogenous members and clusters	Close member involvement.	Synergies with other sectors			Business development (more transparency among members capabilities and help est. consortium for tenders)
	Use the proposal-drafting approach in all the clusters activities: make a SWOT, identify KPIs, identify risks and possible mitigations, set milestones and control points, etc.			Service and business close development on virtual platforms.	Support members in consortium creation			Internationalisation (go for opportunities/tailored support)
	Offer of services: a good mix between "top-down" offer (Strategic Intelligence, use of European networks we are part of, etc.) vs. "bottom-up" (members' "pain")							Innovation (need for support (capacity and information gap), UN SDG as project frame, get better in monitoring funding possibilities- EU project funding opportunities.
	Offer of services must be accompanied with "nurturing members' culture" to fully exploit such offer							Business culture (share knowledge and approach)
Trust and long-term membership are fundamental to exploitation of services we offer								