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# CLUSTEM

**“Empowering CLUSters management and services in TExtile and  
Machinery sectors”**

**Preliminary analysis and Benchmarking for  
excellency**

## **TERM OF REFERENCE**

**For ESCA Expert(s) Recruitment for Clusters  
Benchmarking**

**Publication date: July 20, 2016**

*TERM OF REFERENCE - ESCA Expert(s) Recruitment for Clusters Benchmarking*



## Terms of Reference (ToR)

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Reference	:CLUSTEM/BENCHMARKING/01/2016
Subject	:ESCA Expert(s) Recruitment for Clusters Benchmarking
Countries	:Turkey, Italy, Spain United Kingdom
Description of Assignment	:Benchmarking Analyses for 4 Clusters of the Project
Project	:Empowering CLUSTers management and services in Textile and Machinery Sectors (CLUSTEM)
Period of Assignment/Services:	September 2016 – November 2016

*Proposal must be submitted by email to [enrico.venturini@tecnorex.it](mailto:enrico.venturini@tecnorex.it), [esma.akyuz@ostim.com.tr](mailto:esma.akyuz@ostim.com.tr), starting from **July 21, 2016 included** to **August 19, 2016 included**. Applications received before or after the indicated limit dates will be disregarded*

*Hard copies, with original signatures of the candidate in all pages, must be sent via express mail or courier within 5 working days from the deadline set for the e-mail application to the project coordinator address: Next Technology Tecnotessile – Società Nazionale di Ricerca r.l., Mr. Enrico Venturini, Via del Gelso, 13 – 59100 Prato, Italy.*

*Any request for clarification must be sent in writing, or by standard electronic communication to both e-mails indicated above. Next technology Tecnotessile (NTT), coordinator of the project, in cooperation with Is ve Insaat Makineleri Kumelenme Derneği (WCM), leader of Benchmarking activities, will respond in writing by uploading the answers on CLUSTEM project website (<http://clustem.eu/>), notifying by standard electronic mail of the response, including an explanation of the query without identifying then source of inquiry, to all experts having applied until the date of the written response.*

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## 1. BACKGROUND and CONTEXT

Nowadays the textile & machinery industries faces an unprecedented challenge regarding global competition for every single market across the world. Clusters are a response to those challenges and are able to link cross-border complementarities and geographical proximity of SMEs in the same production area, which can stimulate diversity of production and increase creativity of new products. CLUSTEM intend to address these issues and to help the replication of this process to nearby areas in Europe.

European production still has a strong value when sold abroad. It is inevitable that textile and machinery industries and their supporting organizations within the EU should achieve a set of competences and strategies without disregarding a local action focus, aiming at the success of common entrepreneurial, technological or marketing strategies. CLUSTEM tries to give a concrete contribution to achieve such goals, as it brings together relevant organizations within the textile and clothing EU scenery and namely from the most active and important countries operating in textile and machinery building: Italy, UK, Spain and Turkey.

The activity of clusters is vital for supporting international competitiveness of the European SMEs, through building of collaboration and sharing of added value. The CLUSTEM project is supported by the Cluster Excellence Programme Call (COS-CLUSTER-2014-3-04-02), which aims at the improvement of the policy in the field on cluster management. A better management and organisation can address some of the key factors affecting competitiveness in textile and machinery clusters in Europe. Within this project, activities specifically addressed at industrial textile and machinery clusters will be performed. Project results will be shared with companies within the clusters and will give the possibility to design new services for textile and machinery SMEs. The specific objectives of the project are: reinforcement and improvement of the cluster management capacities of the partners, through benchmarking, training, study visits; establishment of a strategic collaboration between textile, especially advanced textile products, and machinery sectors, which is the main source of innovation for textile SMEs; transfer of knowledge and experiences developed in other clusters for the provision of high quality services to SMEs, increasing the level of innovation capacity and introducing new creative-based ideas for the realisation of new products, facilitating internationalization of SMEs, better exploiting and diffusing Key Enabling Technologies, assisting SMEs in further addressing resource efficiency issues.



This set of goals will be achieved through the implementation of the following actions: benchmarking consultancy from ESCA experts, with the final aim of getting at least the first level of labelling for the 4 clusters; training with European experts in ECEI curriculum for at least the 5 core modules; study visits to 3 gold labelled clusters in other European countries; design of new top quality services for SMEs of the 4 clusters and dissemination of project activities.

For further information about the project, please visit: <http://clustem.eu/>

## 2. OBJECTIVE AND SCOPE OF THE ASSIGNMENT

Next Technology Tecnotessile (NTT) is the coordinator of the project, Is ve Insaat Makineleri Kumelenmesi Derneği (WCM) is the leading organization of the specific action of CLUSTEM project regarding “Preliminary analysis and Benchmarking for excellency”, meaning benchmarking the 4 clusters of project; the action is intended to achieve the following objectives:

- To assess the current level of services delivered to SMEs of each cluster and improvement areas; to assess the current organisation and level of management procedures in use in each cluster;
- To organize a benchmarking activity to scientifically analyse the management performance of the 4 clusters on the basis of the “Benchmarking Methodology” developed by ESCA;
- To improve management capacity of the consortium clusters;
- To organise the assessment process and all other documents or procedures needed to achieve at least Bronze Label of Cluster Management Excellence.

Subcontracts will be activated for the recruitment of European Secretariat for Cluster Analysis (ESCA) Expert(s) on benchmarking activities and methodologies for clusters, who will assist the implementation plan about benchmarking activities of CLUSTEM project for the 4 clusters of the project. The expert(s) will deliver a two-days seminar training about ECEI benchmarking methodologies, and will assist in defining tools and implementation procedures, mapping of the clusters and a specific working procedure to be followed by each organisation for the ESCA certification process, leading the 4 clusters to the achievement of at least the first level of certification.



### 3. LOTS

The objectives are organised in two different lots.

LOT 1 - To organize a 2 days Benchmarking Seminar in Valencia area, Spain, and make out a Benchmarking Report. Only one expert will be recruited, to deliver one single seminar to the 4 clusters professionals (8-10 attendants are expected).

*Contracting authority: WCM*

LOT 2 - To visit each cluster in 4 different countries (England, Italy, Spain and Turkey) to assist in the benchmarking exercise leading to the label assignment to support the preparation of 4 recommendation reports (1 per cluster), plus one integrated report, covering recommendations regarding improvements on 4 management structures. The task includes the definition of tools and implementation procedures, benchmarking maps of the 4 clusters and a specific working procedure to be followed by each organisation for the ESCA certification process.

To assist the 4 clusters in achieving at least Bronze Label of Cluster Management Excellence.

For Lot 2 it will be possible to recruit up to 4 different experts, one per country. Each expert will perform the tasks listed in art. 4 in the country/ies for which s/he is contracted.

*Contracting authorities: the 4 cluster organisations; each organization will finalise one contract; one expert can subscribe more than one contract.*

The selection of the expert(s) will be based, as better specified in art. 11, on the following criteria:

- best value for money for the realization of the objectives of art. 2 and tasks of art. 4;
- technical proposal for the specific assignment of this TOR;
- curriculum vitae, i.e. on the past experience in assisting industrial clusters in improving their management activities and services provided to associated firms.

### 4. DUTIES AND RESPONSIBILITIES OF THE ESCA EXPERT(S)

#### LOT 1

The duties of the Expert includes, but are not limited to:

- **Benchmarking planning**



A preliminary analysis of the organization of the 4 clusters of CLUSTEM project and their services provided to SMEs will be provided to the expert as background information for the subsequent tasks s/he will implement. On such basis, the ESCA expert will contribute to the definition of benchmarking specific goals, tasks to perform and the planning of one joint seminar for the 4 clusters professionals, to be held on 29-30 of September 2016.

➤ **Benchmarking joint seminar**

The ESCA expert will deliver a 2 days seminar to the 4 clusters professionals according to ECEI methodology. The organization of a two days seminar for 2 professionals from each cluster will be arranged, aiming at training clusters staff about ECEI benchmarking methodologies, tools and implementation procedures, to be used and implemented by the staff, in order to achieve at least the Bronze label of Cluster Management Excellence. Seminar dates: 29-30 September 2016; Location: Valencia area, Spain.

## LOT 2

This Lot include no more than 4 different experts (one per country); it is allowed for one experts to act in favor of more than one cluster (in this specific case the expert will be assigned with different contracts from different beneficiary clusters).

The duties of the Expert(s) include, but are not limited to:

➤ **Benchmarking the 4 clusters**

This task concerns the implementation of the ESCA benchmarking procedure for the 4 clusters, including the preparation of a “Benchmarking Map” (one map for each cluster), covering benchmarking indicators and also an explanatory note on how each cluster manager can achieve the indicators; the ESCA selected expert(s) will visit consortium clusters (in the 4 different countries) for the staff interview and will help the managers to implement the benchmarking process, including the preparation of benchmarking tables, and actions/documents needed to get the Bronze label.

The study will include all indicators regarding the structure of the cluster, the management and the governance, financing of the management, services provided, contacts and interaction within the members and achievements and recognition of the organisation.

➤ **Reporting about benchmarking**

The ESCA expert(s), supported by cluster managers, will deliver one recommendation report(s) for each cluster analysed, including improvement and quality increase of organisation, management practices and other solutions for quality improvement of each of the 4 clusters.

➤ **Working procedures for the ESCA Certification process**



Schematic working procedure to be followed by each cluster to achieve at least the first level labelling, given the recommendations formulated in previous reports. As a result of this process, each cluster should be achieving at least Bronze Label.

➤ **Achievement of label**

The ESCA expert(s) will assist the cluster managers in the process of achieving at least the Bronze Label, including documents, actions and recommendations needed until the conclusion of the process.

## 5. TIMEFRAME OF THE WORK

The duration of the assignment will be 2,5 months in total upon the signature of the Contract.

**Lot 1** – The total duration of Lot 1 is up to 30 days

Expected Contract Start Date : 15 September 2016

Expected Contract Completion Date : 14 October 2016

**Lot 2** – The duration of Lot 2 is up to 60 days

Expected Contract Start Date : 01 October 2016

Expected Contract Completion Date : 30 November 2016

In case experts for Lot 2 will be more than one, the above timeframe has to be respected by each contracted expert working for one or more clusters.

## 6. DELIVERABLES AND REPORTING

LOT 1

Deliverables to be provided by the expert:





The expert will be responsible for delivering the two days seminar training about ECEI benchmarking methodologies, tools and implementation procedures. S/he is therefore required to provide educational material and proceedings of the seminar.

## LOT 2

Deliverables to be provided by the expert(s):

- 4 Benchmarking Tables (one per cluster).
- 4 List of Actions (one per cluster).
- Hard and soft copies of the 4 Benchmarking Reports (one per cluster) and all other annexed outputs.
- 4 personalised Recommendation Reports (one per cluster) and 1 Integrated Recommendation Report (for the consortium, with a more inclusive view of actions to implement).
- 4 personalised working procedures for the ESCA Certification process and set of documents required for achieving at least Bronze Label for each cluster.

The deliverables shall be submitted to NTT as project coordinator and to the 4 Cluster Managers for final approval.

All of the deliverables are subject to approval from NTT and cluster managers concerned in order to finalise the payment to the expert.

## 7. DUTY STATION

Lot 1 - Duty station of the Expert is Valencia area, Spain, venue to be specified upon contract signature, for the delivering of the 2-days seminar. Other related activities, like benchmarking planning, can be based elsewhere, according to the expert needs. The 4 project partners may provide a temporary duty station to the expert(s) upon request. In case of unexpected events, the coordinator reserves the right to change location of the seminar; in such a case, the new location will be communicated to the expert not later than September 15, 2016.



Lot 2 - Duty station of the Expert(s) will be his/her home base, apart from the on-site analysis of each cluster, that will take place at different clusters' main office, in the 4 different countries. CLUSTEM partners may provide an office space upon request by the expert(s), in the country more convenient for him/her. All costs and expenses beard by the expert(s) for traveling to clusters' main offices outside of the Expert's home base, including transportation, accommodation and subsistence, will be included in the lump sum amount of the contract.

## **8. TERMS AND PAYMENT**

The following applies both for expert for Lot 1 and expert(s) for Lot 2.

An advance payment, equal to 20% of the contract amount, will be payed to the expert upon signature of the contract. The balance, as lump sum payment, will be made upon approval of all deliverables by WCM and concerned cluster manager(s).

The lump sum will include all costs beard by the expert(s), including travelling to the seminar venue and/or the cluster main office for benchmarking interviews and analyses.

Payments will be made in Euro. The amount paid to the expert(s) shall be gross and inclusive of all associated costs such as social security, income tax, VAT, travel costs, other expenditures etc.

## **9. SERVICES AND FACILITIES TO BE PROVIDED BY THE CONTRACTING AUTHORITY**

The content and the background documents of the 4 Clusters will be delivered to the expert by NTT.

## **10. QUALIFICATIONS AND SKILLS**

The following applies both for expert for Lot 1 and expert(s) for Lot 2.



## General Qualifications

- Esca Expert certificate is required.
- Evidence of being trained by ESCA to become senior experts.
- University degree in, social/environmental/political sciences or scientific disciplines or a related field.
- Full proficiency in writing, reading and understanding English.
- Excellent command of office software, such as word, excel, power point processors, spreadsheets.
- Advanced university degree (i.e., Master and Ph.D.) is an asset.

## Professional Experience and Qualifications

- Minimum three (3) years professional experience on cluster benchmarking, under ECEI initiative.
- Previous experience with other benchmarking practices is an asset.
- Previous experience with cluster management is an asset.
- Previous experience with Machinery and Textile Sector is an asset.
- Knowledge of one of the following languages (Italian, Spanish and Turkish) is an asset.

## Specific Experience and Qualifications

- Experience with delivering seminar regarding ECEI Benchmarking Methodology as evidenced by three (3) similar previous work experiences.
- Experience with analyzing clusters at least in two different sectors and in-depth knowledge of writing the Benchmarking Reports and Benchmarking Mapping for the clusters.



## 11. EVALUATION OF APPLICANTS

The following applies both for expert for Lot 1 and expert(s) for Lot 2.

The evaluation will be based on cumulative analysis (i.e. personal qualifications, technical proposal and price proposal). The evaluation will be based on the following weights:

- Personal qualifications (C.V. – education and personal experience): max 30 points
- Technical proposal: max 30 points
- Price proposal: max 40 points

Total max score per candidate: 100 points.

Candidates that obtain a minimum of 70 pts out of a maximum 100 pts will be considered for the assignment. Candidates that do not meet the minimum requirements will be disqualified.

The candidate(s) will be selected on the basis of the highest score obtained. In case of tie, the candidate with a lower price offered will prevail.

The evaluation of received offers will be performed by the Steering Group of CLUSTEM project, composed by the following members:

- For the Coordinator, NTT, Mr. Enrico Venturini
- For HTTC, Mr. Bill MacBeth
- For ATEVAL, Mr. Felipe Carrasco
- For WCM, Mr. Ziya B. Guvenc

Each member will rank the 3 components of the cumulative analysis, assigning his/her personal score to the each of the 3 components. The final score assigned to each candidate will be the average of the 4 rankings given by the Steering Group members.

As regards Lot 2, for applications from experts applying for more than one cluster, project partners will rank each cluster separately and reserve the right to approve and accept only a part of the application.



## 12. APPLICATION PROCEDURE

Interested candidates must submit the following application documents by stating the reference of this TOR as the subject of the e-mail, from July 21, 2016 included to August 19, 2016 included. All documents and information provided must be in English.

### Lot 1

- A one-page Letter of Interest, containing personal contact details of the expert (Full Name, Address, Mobile Telephone, E-mail address, tax code and VAT number, if applicable), explaining why they s/he is the most suitable for the work, specifying the Lot for which s/he is applying.
- Technical proposal for Lot 1, indicating methodology, timing, duty stations and actions that the expert will implement to achieve the goals set in art. 2, 3 and 4. Technical proposal must not exceed 2 pages.
- Financial Proposal for Lot 1, as lump sum including expert fee and all costs for travelling or other activities related to the performance of the task assigned. A breakdown in sub-categories of the lump sum is required.
- A declaration of honor about personal availability to deliver a 2 days seminar in Valencia area (Spain) in the second half of September 2016, and commitment to terminate the task assigned within the deadline indicated in art. 5.
- Personal CV, including past experience in similar projects and at least 3 references.
- A declaration of honor about personal absence of judgment of conviction.
- A declaration of honor about personal absence of conflict of interest with the organisations of the CLUSTEM project.

### Lot 2

- A one-page Letter of Interest, containing personal contact details of the expert (Full Name, Address, Mobile Telephone, E-mail address, tax code and VAT number, if applicable), explaining why s/he is the most suitable for the work, specifying the Lot for which s/he is applying; for Lot 2 candidate(s) must specify how many clusters they intend to analyse and in which countries.
- Technical proposal for Lot 2, indicating methodology, timing, duty stations and actions that the expert will implement to achieve the goals set in art. 2, 3 and 4. Technical proposal must



not exceed 3 pages. For experts applying for more than one cluster, one technical proposal for each targeted cluster has to be submitted.

- Financial Proposal for Lot 2, listing separately for each cluster that is intended to analyse a lump sum including expert fee and all costs for travelling or other activities related to the performance of the task assigned; the total definitive financial proposal for Lot 2 has to be specified at the end of the document. A breakdown in sub-categories of the lump sum is required.
- A declaration of honor about personal availability to perform the task and commitment to terminate it by 30 November 2016, including the visit to the cluster(s) for the benchmarking exercise.
- Personal CV, including past experience in similar projects and at least 3 references.
- A declaration of honor about personal absence of judgment of conviction.
- A declaration of honor about personal absence of conflict of interest with the organisations of the CLUSTEM project.

Proposal must be submitted by email to [esma.akyuz@ostim.com.tr](mailto:esma.akyuz@ostim.com.tr), and cc to [enrico.venturini@tecnotex.it](mailto:enrico.venturini@tecnotex.it) no later than **19 August 2016**, COB. Hard copies, with original signatures of the candidate in all pages, must be sent via express mail or courier within 5 working days from the deadline set for the e-mail application (stamp on the envelope will assess the on-time dispatching) to the following address: Next Technology Tecnotessile – Società Nazionale di Ricerca r.l., Mr. Enrico Venturini, Via del Gelso, 13 – 59100 Prato, Italy.

Expert(s) are responsible to autonomously arrange their trips and accommodation to the destinations of the tasks to be implemented.

Costs incurred by the candidate(s) in preparing and submitting the applications will not be reimbursed.

### **13. PRICE PROPOSAL GUIDELINE**

The prospective experts should take the following explanations into account during submission of his/her price proposal.

- The lump sum price proposal and related breakdown must be in Euro (€).



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- The price proposal should be indicated in gross terms and hence should be inclusive of costs related to tax, social security premium, visa (if needed), travels, accomodation and any other kind of expenditure needed to perform the task.
- NTT will not make any further clarification on costs related to tax, social security premium, visa etc. It is the applicants' responsibility to make necessary inquiries on these matters.

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*"This Term of Reference is part of the project CLUSTEM which has received funding from the European Union's COSME Programme (2014-2020).*

*This content of this Term of Reference represents the views of the author only and his sole responsibility; it cannot be considered to reflect the views of the European Commission and/or the Executive Agency for Small and Medium-sized Enterprises 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".*