



CLUSTER MANAGEMENT TOWARDS EXCELLENCE IN ADVANCED MANUFACTURING AND TEXTILE INDUSTRY

TERMS OF REFERENCE (Tender)

Expert(s) Recruitment for Cluster Training

Publication date: 5th October 2020

Terms of Reference (Tender)

| Reference | CLAMTEX TRAINING 2021 |
|--------------------------------|--|
| Subject | Expert(s) Recruitment for Cluster Training |
| Countries | France, Portugal, Spain |
| Description of Assignment | Training Programme for Capacity Building (5 Clusters, 10 Participants) |
| Project | Cluster management towards excellence in Advanced Manufacturing and Textile Industry |
| Period of Assignment | January 1 st 2021 – June 30 th 2021 |
| Maximum budget (excluding VAT) | 37.500 € |

The Proposal must be submitted by email to Josep Casamada projectes@textils.cat. This tender opens on 6th October 2020 at 9am CEST and the deadline is on 28th October 2020 at 17h CET (Brussels time). Applications received before or after these dates will be disregarded.

TABLE OF CONTENTS

| | |
|--|-----------|
| 1. Background and context | 4 |
| 2. Objective and scope of the assignment | 5 |
| 3. Reports, duties and responsibilities..... | 7 |
| 4. Timeframe of the work | 8 |
| 5. Location..... | 9 |
| 6. Contracting authorities | 10 |
| 7. Terms and payment..... | 11 |
| 8. Qualifications and skills..... | 12 |
| 9. Evaluation of applications | 13 |
| 10. Application procedure..... | 14 |
| 11. Price proposal guideline: | 15 |
| Disclaimer | 16 |
| ANNEX 1. LETTER OF INTEREST..... | 17 |
| ANNEX 2. TECHNICAL PROPOSAL | 18 |
| ANNEX 3. FINANCIAL PROPOSAL..... | 19 |

1. Background and context

CLAMTEX is a European Strategic Cluster Partnership composed of textile and advanced manufacturing clusters. CLAMTEX partnership is formed by 5 clusters from 3 European Member states (France, Portugal and Spain) and representing 4 regions: Catalonia and Valencia in Spain, Pays de la Loire in France and Norte in Portugal, with a joint strategy to facilitate the uptake of digitalization and the user-centered approaches, benefiting both advanced production suppliers and textile companies in a win-win approach.

One of the aims of CLAMTEX is to develop cross-regional cooperation. The first step has been to define a common strategy and a roadmap of joint activities, addressing business needs of SMEs and clusters that are required to better adapt to trends, challenges and opportunities that come along with industrial changes. This goal can be fulfilled through a program of visits among different countries, regions and organizations.

The next step is to implement a capacity-building program to each of the clusters in order to overcome cluster management weaknesses and the different cross-sectoral and transversal opportunities identified in within CLAMTEX project.

The training will allow evaluating, raising and sustaining the competitiveness of regional economic clusters and to promote economic development of targeted regions.

The training will allow each of the partners:

- To develop the skills necessary for excellence in cluster management
- To uptake transversal facilitating skills for promoting high quality services to their members

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

2. Objective and scope of the assignment

The objectives the trainings intend to achieve are as follows:

- To design, bespoke and deliver specific case-based training about cluster excellence to CLAMTEX partners.
- To report on the training performed and the achieved level of learning.
- To improve their communication skills.
- To draw recommendations for the future delivery of effective services to SMEs, the creation of dedicated Exchange opportunities (for cluster members or other organisations) and the definition of individual and joint strategies.
- To draw recommendations for facilitating cluster members better use of advanced technologies, productivity, resource efficiency, innovation and creativity.

Subcontracts will be awarded for the recruitment of qualified Expert(s) for training activities and methodologies for clusters, who will deliver a training programme on the 7 modules identified in the lots below.

This training is addressed to the five partners of the project and will include at least two three representatives from each organisation.

As regards training topics, those needs to build on excellence in cluster management, the following contents has to be considered for each lot.

Training Lots:

Lot 1 – Strategy and leadership: in order to address the cluster value proposition, new business models uptake, tools for sectoral analysis, the uptake of design thinking tools to support strategy definition in participatory approaches, cluster leadership to improve the member engagement and to attract new members, as well as change management.

Lot 2 – Data tools for management: data analytics methodologies and visualization tools for KPI assessment and monitoring, usage of CRM programs to integrate data processing and management.

Lot 3 – Communication tools: particularly in terms of communication in times of crisis, digital communication strategies tools such as social media, lean communication skills. Additionally, the digital communication will also include approaches for facilitating virtual events such as webinars (camera setting, hosting, etc.) and virtual showcases to facilitate internationalization remotely now that traveling is restricted or limited.

Lot 4 – Creative and interactive facilitation tools: tools to encourage cooperation among members, innovative thinking methodologies (i.e. design thinking, creative thinking, thinking outside the box, session animation). The key aim is to facilitate business cooperation and stimulate innovative ideas of our members.

Lot 5 – Innovation management and monitoring: particularly on open innovation, and evaluation of impact of innovation projects

Lot 6 – Facilitate circular economy: tools for facilitating circular economy business models, global methodologies, facilitation tools to support matchmaking in circular approach and cross-sectoral opportunities.

Lot 7 – Leadership for digital transformation and tools to implement digital transformation: basics of digital transformation (concepts, technologies), support tools (road mapping, change management, etc.), support systematization, digital innovation hubs (how to establish them, animate them, tools).

The training topics are divided into seven lots to select the best experts in each knowledge area and achieve the excellence in cluster management for the participants.

Each expert can send an offer related to one or more lots, according to their own area of knowledge and experience. Even if the subcontract presents offer to more than one lot is not mandatory that all are contracted. The evaluation will consider the evaluation criteria detailed in section 9 for each proposal and training lot.

The following table summarizes the maximum available budget for each lot and the minimum number of training hours.

| Lot number | Maximum budget excluding VAT | Minimum hours |
|--|------------------------------|---------------|
| 1. Strategy and leadership | 10.000 € | 24 |
| 2. Data tools for management | 3.000 € | 8 |
| 3. Communication tools | 6.000 € | 10 |
| 4. Creative and interactive facilitation tools | 7.000 € | 12 |
| 5. Innovation management and monitoring | 3.000 € | 8 |
| 6. Facilitate circular economy | 3.000 € | 8 |
| 7. Leadership for digital transformation and tools to implement digital transformation | 5.500 € | 10 |

This application is open to trainers/facilitators who are specialized in completing trainings/workshops and have proven and demonstrated broad knowledge of and ability to implement the principles, methods, techniques and systems of mentoring.

3. Reports, duties and responsibilities

The content of the training is based on the strategical information about the 5 clusters developed within the project that has identified the specific needs for each cluster and comprises the seven lots of this tender.

The reports, duties and responsibilities consist of but are not limited to the following:

- The preparation of the contents and materials for the capacity building. The training will include at least one of the seven core modules and will be delivered by the expert(s).
- The expert(s) will deliver training in a dedicated location set by the consortium or remotely.

For each training the contractor will send the details of the proposed programme at least two weeks before the date the training is scheduled to take place.

On completion of the training the expert will recommend and assist in the implementation, producing the related report, of the specific case studies (for each project cluster) and will provide:

- The training material, including presentations used
- A report on the training performed and the assessment of the achieved level of learning
- A recommendation paper for the future delivery of effective services to SMEs, the creation of dedicated Exchange opportunities (for cluster members or other organisations), the definition of individual and joint strategies and the organisation of future Joint Learning events.

All the reports are subject to approval from each contractor to finalise the payment to the expert and shall be delivered electronically both in modifiable and non- modifiable format in clear quality English.

4. Timeframe of the work

The duration of the assignment will be of maximum six months upon the signature of the Contract.

- Expected contract start date – January 1st 2021
- Expected contract completion date – June 30th 2021

This timeframe includes any preparatory requirements prior to training and allows for assistance for the case study report and completion.

Indicatively, the physical training will take place in the location agreed but due to the restriction mobility this training can be also performed online. The contractor will confirm the exact dates at the contract signature.

This timeframe includes any preparatory requirements prior to training and allows for assistance for the implementation that may occur after the completion date.

By the completion date the expert(s) must submit to each contractor all the deliverables of Section 3.

Each contractor reserves the right to request deliverable modifications or adjustments, by the completion date, or in exceptional circumstances, by 3 months from the completion date. The contractor will finalise the payment of the balance only after its formal approval of the service performed and the deliverables submitted.

5. Location

All five cluster partners will receive the training together and in the same location or at the same time, if remotely training, agreed among the contractors and the contracting authorities.

Contractors have to establish a calendar scheduled for each training lot.

Contractors have to schedule a training calendar for each lot and propose / agree the dates.

The contractor might also propose to arrange the training in virtual or blended modality, by using an e-platform of his choice. In case of providing a training virtually, any costs related to the e-platform must be included in the financial offer as part of the lump sum.

In case of unexpected events or force majeure, the coordinator reserves the right to change location of the training; should this be necessary, the new location will be communicated to the expert(s) no later than 15 days before the training scheduled date.

6. Contracting authorities

CLAMTEX is a partnership of 5 different clusters, each organisation will be responsible for contracting the recruited expert(s) for his own quota, equal to the approved fee from the expert by the number of subscribed trainees.

This will turn into having 5 contracts for the same expert(s).

The contracting authorities are:

ASOCIACIÓN DE EMPRESARIOS TEXTILES DE LA COMUNIDAD VALENCIANA, VAT number ES-G46108569, established in C/Elis Telers, nº20 46870 Ontinyent-Valencia (Spain),

ASSOCIACIÓ AGRUPACIÓ D'EMPRESSES INNOVADORES TÈXTILS, VAT number G64876667, established in Carretera BV-1274, km. 1, Edifici Nord, Planta 2, Local 22 E-08225 Terrassa (Spain),

CENTRO TECNOLÓGICO DAS INDÚSTRIAS TEXTIL E DO VESTUÁRIO DE PORTUGAL, VAT number PT502201886, established in Rua Fernando Mesquita 2785 Quinta da Maia P-4760 034 Vilanova de Famalicão (Portugal),

POLE EMC2, VAT number FR84487891012, established in Chemin du Chaffault, F-44340 Bouguenais (France),

PRODUTECH-ASSOCIAÇÃO PARA AS TECNOLOGIAS DE PRODUÇÃO SUSTENTÁVEL, VAT number PT508761395, established in Rua dos Platanos 197, P-4100 414 Porto (Portugal).

7. Terms and payment

An advance payment, equal to 40% of the contract amount, will be paid to the expert(s) upon signature of the contract and the remaining 60% will be paid within 30 days after the completion of the service.

The balance, as lump sum payment, will be made upon approval of all deliverables by each contractor.

The lump sum will include all costs incurred by the expert(s), including travel and accommodation if necessary.

The indication of the fee per single trainee is required in the offer.

Payments will be made in Euros.

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 and any other expenditure.

8. Qualifications and skills

General Qualifications:

- University degree in relevant field of the training lot applied.
- Fully proficient in speaking, writing and understanding English.
- Advanced university degree (i.e. Master and PhD.) is an asset.

Professional Experience and Qualifications:

- A minimum of two (2) years professional experience in cluster training.
- Previous experience with cluster management training is an asset.
- Previous training experience with clusters on Advanced Manufacturing and/or Textile sectors is an asset.
- Knowledge of one of the following languages (French, Portuguese and Spanish) is an asset.

Specific Experience and Qualifications

- Extensive experience (at least 5 years) experience in completing trainings/workshops for organizations.
- Extensive experience on building capacities.
- Excellent inter-personal communication skills including experience of facilitation of trainings/workshops and presentation.
- Proven and demonstrated broad knowledge of and ability to utilize principles, methods, techniques and systems of project management.
- Experience of delivering trainings for at least one of the 7 training lots according to CLAMTEX modules is required. Examples of previous training are required.
- Experience with analysing clusters at least in two different sectors (textile and machinery are an asset).

Applicants can be either organisations (companies, foundations, etc.) or group of natural persons.

In the latter case, applicant is required to submit the proposal with only one leading member, specifying the group members and their specific skills and experience in the subjects of the 7 core modules or the lots included in the offer. In case the applicant is a group of natural persons, it will fall under the leading member responsibility the level of performances and results of the other trainers of the group, being him/her the only contracting party responsible for the implementation of the task. It will be the leading member duty to provide full details of the above-mentioned qualifications, along with adequate justifications (as per Section 11).

9. Evaluation of applications

The selection process of the trainer/expert will be based on the set of criteria developed by CLAMTEX Evaluation Committee to evaluate the proposals.

The maximum budget allocated to this contract is fixed at 37.500 € (thirty-seven thousand and five hundred euros) including fees, travel and all other costs. Travel and subsistence expenses should be part of the lump sum and will not be refunded separately. The maximum budget amount is excluding VAT.

Any offers received that do not respect this maximum budget will be automatically excluded from the evaluation procedure.

The Evaluation Committee will evaluate the proposals by using the combined scoring method. Technical proposal will be evaluated following the criteria and content of each lot on 70%; whereas financial proposals will be evaluated on 30%.

The selection of the expert(s) will be based on the following criteria:

- Best value for money for the delivery of the objectives.
- Qualifications and professional experience.
- Previous training examples of assisting industrial clusters to achieve excellence.

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

- General qualifications, professional qualifications and experience: max 20 points
- Technical proposal: max 45 points
- Price proposal: max 30 points
- Proposal for more than one lot: 5 points

Total max score per applicant: 100 points.

Applicants who obtain a minimum of 60 points out of a maximum 100 points will be considered for the assignment. Applicants who do not meet this minimum requirement will not be considered.

The Applicants will be selected based on the highest score obtained. In the case of a tie, the Applicant with a lower price offer will be awarded.

The evaluation of offers received will be performed by the evaluation board composed of one representative from each contracting authority.

Each member will rank the 4 components of the cumulative analysis, assigning his/her personal score to the each of the 4 areas. The final score assigned to each Applicant will be the average of the 4 rankings given by the evaluation board.

10. Application procedure

Interested applicants must submit the following application documents by stating the reference of this TOR as the subject of the e-mail, between 6th October 2020 and 28th October 2020 inclusive.

All documents and information provided must be in English.

- A one-page Letter of Interest (Annex 1), containing contact details of the expert (Full Name, Address, Mobile Telephone No, e-mail address, Tax code and VAT number, if applicable), explaining why they, he/she is the most suitable for the work.
- Technical proposal (Annex 2) indicating methodology, timing, location and actions that the expert will implement to achieve the goals set in Sections 2, 3 and 4.
- Financial Proposal (Annex 3) as **lump sum** including expert fees and all costs for travelling or other activities related to the performance of the task assigned. A breakdown of the lump sum is required per lot, detailing, among the others, the fee per single trainee. The price for the tender must be quoted in euro. Tenderers from countries outside the euro zone have to quote their prices in euro. The price quoted may not be revised in line with exchange rate movements. It is for the tenderer to assume the risks or the benefits deriving from any variation.
- CVs of all mobilised trainers, including past experience in similar projects and at least 3 references.

The Proposal must be submitted by email to Josep Casamada projectes@textils.cat with a clear reference to this tender: "CLAMTEX Training Tender" on the subject line.

This tender opens on 6th October 2020 and the deadline is on 28th October 2020. Applications received before or after these dates will be disregarded.

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

11.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 (€).
- Tenderers from countries outside the euro zone have to quote their prices in euro. The price quoted may not be revised in line with exchange rate movements. It is for the tenderer to assume the risks or the benefits deriving from any variation.
- The price proposal should be Gross and inclusive of costs related to tax, social security premium, visa (if needed), travel, accommodation and any other kind of expenditure needed to perform the task.
- AEI TEXTILS will not provide any further clarification on costs related to tax, social security premium, visa etc. It is the applicants' responsibility to make the necessary enquiries on these matters.

DISCLAIMER

“This Term of Reference is part of the project CLAMTEX which has received funding from the European Union’s COSME research and innovation program under grant agreement no. 872862.

The 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”.

ANNEX 1. LETTER OF INTEREST

Explain in one page your proposal for providing the CLAMTEX consortium the training included in lot number xxx , your practical experience, previous clusters you have advised and trained before, ...

| Contact information | |
|-------------------------|--|
| Lot of Assignment: | |
| Organisation or Person: | |
| Contact person: | |
| Address: | |
| TAX code (VAT number): | |
| E-mail: | |
| Telephone: | |
| Mobile: | |
| Web: | |

Proposal summary:

| Lot(s) addressed: | |
|---|--|
| Financial offer summary (total amount): | |
| Total hours of training offered: | |

ANNEX 2. TECHNICAL PROPOSAL

Organization and Experience

1. Description of the background of your organisation relevant to this task, including your organisation's knowledge, skills and experience with similar tasks. Please include concrete examples of past work related to this assignment.

2. Description of Approach and Methodology

Please describe in detail your proposed approach and methodology, including:

- The implementation of actions to achieve the goals set in Section 2, 3 and 4.

3. Work Plan

A work plan indicating methodology, timing and actions.

4. Team Composition and Task Assignments

Please provide a brief description of each team member and a statement of how team members complement each other to meet the knowledge and skills needs of the assignment. Additionally, please provide the information requested in the table below.

| Name | Area of Expertise Relevant to the Assignment | Designation for this Assignment | Assigned Tasks |
|------|--|---------------------------------------|----------------|
| | | | |
| | | | |
| | | | |

5. CVs of experts

ANNEX 3. FINANCIAL PROPOSAL

FINANCIAL PROPOSAL FORM

From: (Please, Indicate full name):

Date:

Signature:

Reference:

Herewith I confirm my intent on provision of training in accordance with Terms of Reference in lot number xxx.

Given the above, please see below my financial proposal and its breakdown

| Description of services/travel expenses | Amount (€) |
|---|------------|
| Fee requested for completion of XXX as per TOR (XXX working hours) | |
| Fee requested for completion of XXX as per TOR (XXX working hours) | |
| Fee requested for completion of XXX as per TOR (XXX working hours) | |
| (add as needed) | |
| Total fee for completion of services | |
| Per diems and air ticket cost (from XXX to XXX) for 1st travel | |
| Other travel expenses for 1st travel from XXX to XXX (e.g. visa, terminals, where applicable) | |
| (add as needed) | |
| Total travel expenses | |
| Total | |

| | |
|-----------------------------------|--|
| Fee per participant | |
| Additional participant fee | |

Note: Prices should be in EUROS (€) and include all expenses related to the assignment. Contractor is responsible for payment of all relevant taxes.