BSR STARS
Innovation in the Baltic Sea Region

Guidelines for partner search and matchmaking

Introduction

This handbook presents guidelines for facilitating the development of collaborative relationships and partnerships within and between clusters or networks of organisations. It gives specific recommendations regarding the development process as well as available methods that can be used in building the effective relationships between partners. It reflects selected aspects of partner search processes, without presenting a comprehensive "manual". Where relevant, it links the user to external sources.

The handbook has been developed as part of Innovation Norway's contribution to the Stardust programme. The *conceptual framework* for partner search and matchmaking was developed by Innovation Norway in close cooperation with Enterprise Estonia, and presented for and discussed with the five pilot projects being the core of Stardust.

The *content* of the handbook has been developed by Oxford Research AS, with Bart Romanow as the main contributor. Chapter *3.2.1: Knowledge sharing tools,* has been provided by Enterprise Estonia based on a contribution from Tobias Ley at Tallinn University.

The main intention is to use it as a tool for development activities in the Stardust pilots, as well as in other initiatives where clusters and networks see the need for expanding their partnerships by linking up to new partners.

We will use the wording **"network"** or **"initiative"** along the text, since the guidelines are not only and exclusively addressing the needs of clusters, but rather refer to networks of clusters or networks of partners cooperating in the macro-region.

The handbook includes:

- A comprehensive overview of a development process that will lead to new partners for a cluster / network.
- Description of specific activities and decisions within the individual phases of such development.
- Information on relevant cooperation platforms, tools and services that can be used in the subsequent phases.

Feedback and comments to the handbook are highly appreciated! This first version should be reviewed and further developed based on practical experiences from partner search and matchmaking activities.

Innovation Norway

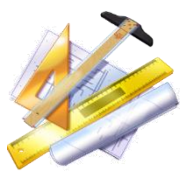
Oslo, December 2012

Content

Symbols used in the guidelines:

CHECKLIST

TOOLBOX



KNOWLEDGE

TIPS TO REMEMBER

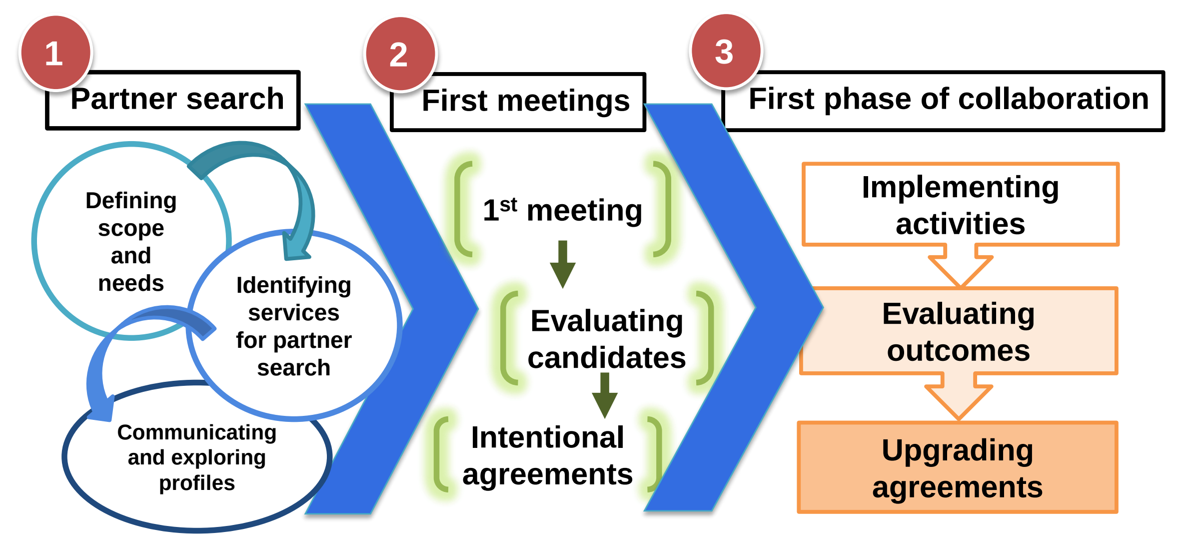
The Model

The model used for preparation of these guidelines consists of a series of actions designed for building strategic linkages between clusters, innovation milieus or innovation networks in the BSR as well as linking new partners to existing consortia. There are three main phases with a number of subsequent tasks in each of the phases presented in the diagram below. The entire activity related to partner search and matchmaking will be linked to the other work packages in the BSR programme, especially the five pilot projects, where methods and tools will be tested.

Forming new partnerships is needed both to explore new strategic opportunities and to make more efficient use of a common knowledge base within the region. Partnerships may be project based and ended when joint projects are concluded, or lead up to more long-term strategic collaboration and alliances. Our focus for these guidelines was partnerships between organized clusters, innovation milieus or innovation networks with participants from three or more countries. Partnerships obviously are to be based on a joint understanding of partners' resources, strategic interests, strategic opportunities and possible benefits from joining forces. It must, as well, be based on mutual trust. The document presented below describes tools for establishing such strategic partnerships.

Building strategic linkages is here defined as a set of activities that can facilitate the process of forming strong and strategic oriented partnerships.

Figure 1: Building strategic linkages: Main elements

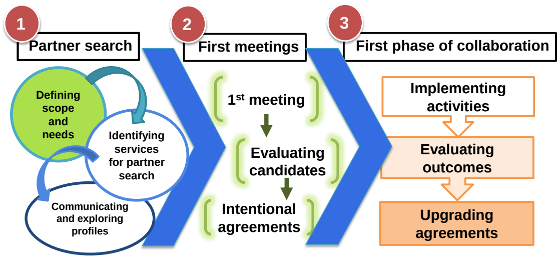


Source: Oxford Research AS

The model figure presented here will be used along these guidelines, at the beginning of each chapter, in order to guide reader through the model process.

Chapter 1. Partner search

1.1 Defining scope



Hewlett and Packard or Johnson and Johnson - successful business partnerships built from the very beginning, from the initial idea. These names so quickly conjure up images of corporate success it's easy to forget they were once little more than two entrepreneurs and a dream.

A key element in identifying partners is the "people" issue. Successful collaborations are built on strong interpersonal relations and shared values between organisations and individuals. Networks and personal recommendations are particularly useful in this respect. It is therefore vital for cluster organisations and policy makers to attend and actively participate in networking events, workshops, international conferences and seminars, etc.

Whilst the identification of partners from outside Europe can lead to significant benefits, it is generally easier to identify partners in neighbouring countries and develop effective links with them.[1]

Finding that second half of an apple to help build a new business or network is not an easy task. One may surely agree, that good business partner, must:

- share vision and enthusiasm,
- bring expertise in the areas in which other partners are inexperienced.
- understand the legal and financial responsibilities
- be someone with whom others get along.[2]

A partnership is like a marriage in important ways, like requiring a high level of trust and the fact that not anyone will do. No one is forcing anyone to start cooperation! Nevertheless it is useful to do so, when the business is missing some important factors for development in the future. So, what are the tools for choosing your partner right?

Since there are different types of cooperation possible, there are also different matchmaking tools that can be essential in the process of looking for possible partner. In this chapter we will answer the following questions:

1. What type of cooperation we are looking for in our initiative? What partners will suit us most? What partner we really need?
2. How to find the (possible) relevant partners? And: How to assess their potential for cooperation?
3. How to start the contacts in order to not be burned?

Answer to the first question will influence further steps, therefore it is important to understand the differences between concepts:

Table 1: Types of cooperation and subsequent matchmaking tools

Characteristics / motivation	Possible Matchmaking tools /events
Cluster to cluster (C2C)	
Clusters and cluster organisations try to cooperate and to **learn from each other** taking into account the different strengths and needs. This activity is enhancing the capacity of companies related to the clusters in question.	• Cluster conferences, workshops and events • Matchmaking events dedicated to clusters • Cluster collaboration platforms • Discussion for a •
Business to business (B2B)	
This type of cooperation describes commercial cooperation between persons or businesses, such as between a manufacturer and a wholesaler, or **between a research**	• Industry fair • Business intelligence services • Business

[1] Cluster Internationalisation Handbook; Tactics 2012.
[2] Finding the Perfect Business Partner; Paul Edwards and Sarah Edwards; http://www.inc.com/articles/2001/04/22428.html

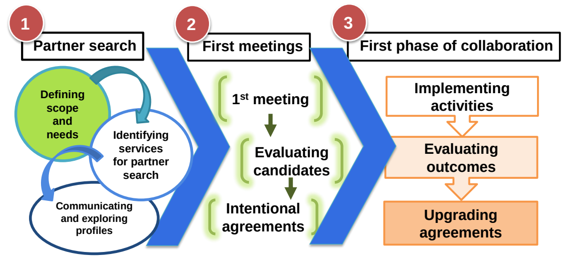
institute and innovative production company. In cluster context this relation will be dedicated to situation when one of the businesses is interested in cooperation with another due to some **missing** value chain **elements**, which need to be filled in, in order to gain/raise competitiveness.	matchmaking services • Web search • Social media • Database search • development agencies • commerce chambers • technological parks
Cluster to business (C2B)	
A situation when a cluster initiative is engaged in cooperation with company, external to the cluster, **delivering unique products, knowledge or/and services** required for cluster initiative to gain/sustain its competitive advantage.	• The same as above
Cluster to research (C2Research)	
A situation when a cluster initiative is engaged in cooperation with research institution, external to the cluster, **delivering unique research capabilities and intellectual capital** required for cluster initiative to gain/sustain its competitive advantage.	• Research projects database search • Patents databases
Source: Oxford Research AS	

In this particular step the correct approach for definition of the scope of cooperation, starting from the real needs analysis is the most crucial. There is a number of tools which may be used here, but in order to make the process really straightforward, we will concentrate on the following: profile analysis; partner search tools and matchmaking events.

More examples regarding the approach to self- analysis as well as different diagnostic tools used in clusters and networks of clusters can be found in Cluster Internationalisation Handbook; Tactics 2012. This source presents diagnostic tools such as the Assess Awareness diagnostic in Step 2, the Cluster Excellence Benchmarking with the EFQM Excellence (see Step 1) and the Cluster Dynamics model (see Step 10). All these tools may help a cluster organisation understand itself.

As with any successful relationship, a high level of self-awareness is needed by the cluster organisation in order to identify potential partners with the right blend of shared values and complimentary competencies.

1.2 Identifying needs for partners and profile of partners



In answering the question regarding initiative's needs for partner, we shall first of all focus on the analysis of current stakeholders in our environment. Such a methodical approach will enable identification of strong existing partners, as well as the missing elements. **Stakeholders' analysis** seems underestimated in management practice, but shall be very much recommended in sound matchmaking process.

As a first step, the stakeholder analysis lists the main organisations that are considered supporters of the network. Subsequently their potential **influence and support** is evaluated in order to derive concrete measures for the individual stakeholders.

The stakeholder analysis provides a quick overview of the supporters relevant to the network and their importance. Later on down the road, concrete measures can be derived to target these organisations in order to obtain desired results.

1.2.1 Data gathering

Stakeholder analysis must be based on thorough approach to data gathering. A profound desk research should be performed to get the first overview. All information channels such as Internet, private contacts, available statistics and existing documents provide a broad mapping on relevant partners.

Due to the fact, that some information cannot be obtained from a desk research, it is reasonable to undertake interviews with stakeholders in order to gather respective information. It must be noted that in order to undertake a solid stakeholder analysis an effort in data gathering from existing stakeholders is required.

In addition to reviewing the published information, more detailed and more recent information needs to be directly obtained from the stakeholders within the network. The focus of these one-on-one interviews should be on identifying common roadblocks and common opportunities; for reasons of confidentiality these will not always surface in a workshop or open meeting setting. A personal, face-to-face interview will gather a much richer information base than a questionnaire or a telephone interview. The richness of insights will also increase over time as trust develops between the stakeholders will grow. Undertaking a series of interviews with key stakeholders will also start to provide the management of the initiative with valuable allies for subsequent projects in the future.

In some networks dedicated survey deliver substantial information, covering required aspects of the analysis. Using the survey will result in more comparative information regarding partners' strengths and weaknesses. Also an analysis of partners' needs and expectations may be conducted with a focus on innovation. The analysis serves the purpose of shaping the discussion regarding key activity areas and the detailed measures which should be supported within the network initiative in the future.

The main tool for this part of analysis is usually a questionnaire sent to all initiating stakeholders, plus face-to-face interviews with their representative managers.

In order to obtain inner dynamics in the network, there is a need for engaging numerous actors to reach a critical mass for the initiative. The following actors should be considered and their contribution analysed:

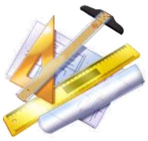
- Companies
- Cluster organisations
- Regions and their development agencies
- Technology transfer organisations
- Policy makers
- Trade associations
- Financial institutions
- R&D-centres
- Trade unions
- Academia
- Industry associations

Checklist for stakeholder analysis

- ☑ Spend reasonable time/resources to gather required data about stakeholders. Consider:
    - survey,
    - interviews,
    - secondary data gathering.
- ☑ Shape the stakeholders' matrix/table structure in the way which will best fit your future plans for using it.
- ☑ Discuss/update the stakeholder analysis during the management meetings in the network.
- ☑ Gather the information that is apparently missing in the initial matrix after each update.
- ☑ Update stakeholders' analysis regularly.
- ☑ When planning future projects within the network – use the information contained in the stakeholders' analysis and shape your steps accordingly to 'power grid', engaging relevant partners.
- ☑ Analyse missing elements and identify matchmaking needs.

1.2.2 Templates

The example of appropriate stakeholder analysis matrix is presented in the table below. However as every example, this can be changed or developed accordingly to needs and foreseen usage.



Please note that apart from summative information regarding the stakeholders' status and resources, the analysis also contains an assessment of their (potential) position towards the development of the initiative. This aspect will later on allow for appropriate stakeholders management.

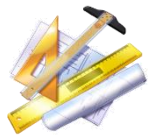
A much more complex matrix for assessment of cluster partners was developed in by GTZ in the manual titled "Cluster Management – A Practical Guide" see chapter 1.1.3. Cooperation and Performance Test for Cluster Partners.

Table 2: Example of stakeholders analysis

Stakeholder name	Type and profile	Resources available	Experience in cluster collaboration	Perceived attitudes/risks	What do we need them for?	Power (**influence** over the network activities)	Interest (how interested they are in **supporting** the network)	Measures for engagement
						(low/medium/high)		
Institute for Environment Protection in	Public research institute. Operating in the area of environment protection and green technologies.	Laboratory facility which can be used for development and testing of new technologies in the area of air pollution and CO2 capture and storage	Not experienced in cluster projects. Long record of international cooperation in research projects, not directly linked to market oriented exploitation.	Institutionally the institute (and its research staff) is interested in international projects and exchange of knowledge. Difficulties in commercialisation of research outcomes, since the researchers are mostly interested in publications, and do not have necessary incentives for knowledge transfer to industry.	Potentially usable for development and testing of new technologies.	Medium	High	The institute might be engaged in development/implementation of new technologies under the conditions that resources for research are assured form external sources and institute IPR rights and publication possibility will be assured.
EnviGlobe Ltd.	Small private company with developing market potential in the area of green services management consulting (water and air pollution)	Consultants able to conduct testing and market advice in the area of environmental management, with for – profit basis only.	The company participates regularly in its local environmental cluster activities, delivering project management and technical expertise services to mostly construction industry.	The company is run by open minded management board, potentially interested in participation in international projects.	May assist in market implementation of new environmental solutions.	Low	Low	As a typical SME the company is very much engaged in close-to-market activities, nevertheless it might be well supportive to projects with commercial focus, delivering profit in short run.
Company XYZ Ltd.								
Regional								

Development Agency or Balticas								
Venture Fund Capitia AS								
…								
Source: Oxford Research AS								

1.2.3 Assessing needs – a follow up of stakeholders analysis



In terms of matchmaking and partners search the most important step, after preparation of the stakeholders' analysis matrix, would be creation of subsequent table presenting perceived current needs for partners.

Such an analysis must **be reflecting the strategic action plan** for the initiative and **built upon the analysis of vision and defined goals** identified in this document.

Potential needs for partners might be matched by revision of information from stakeholders' analysis, or simply by reflection upon missing elements, needed for the intended development of the initiative, as demonstrated in the example.

Table 3: Needs' analysis - example

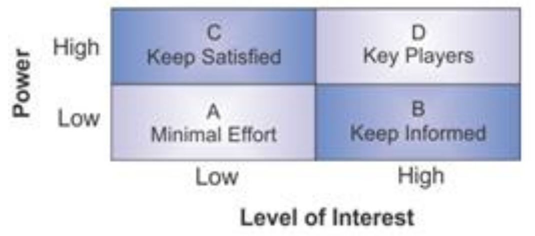
Strategic goal	Competence and resources needed	Current status	Missing elements
1. Provide information about clean water business opportunities	• Good orientation within public private partnerships initiatives • Knowledge about planned water and sewage projects in the region • Knowledge of investment plans of key players in the sector • Professional IT platform enabling delivery of information	• Regional development agencies engaged in the project from the beginning • Open access to public tenders database	• Local governments responsible for water and sewage and public investment partners not engaged in the project • Lack of settled mechanism for information exchange
2. Establish exchange of expertise between research organisations	• A number of research organizations of various relevant profiles and interested in cooperation • Experience in preparation and coordination of research activities • Access to financial sources for support of research programmes	• Only two relevant research organisations engaged from the start-up of the initiative • Some resources available for organisation of workshops and events	• No resources for larger academia collaboration and financing of research undertakings • No experience in coordination of large research projects • Some areas of the research needed for development of the initiative not covered
3. …	• …	• …	• …
Source: Oxford Research AS			

1.2.4 The power grid – intuitive tool for managing stakeholders

Stakeholder management is critical to the success of every project in every organization or network. Engaging the right people and organisations in the right way in the network can make a big difference to its success!

As a first step, when the network is shaped, the stakeholder analysis covers the main actors who are relevant as supporters of the initiative (initiating actors), with analysis of their potential and expectations. Subsequently their influence and support must be evaluated in order to derive concrete measures for the individual stakeholders.

Figure 2: How to deal with stakeholders – basic power grid



Source: the Open Group

The grid presented above visualises the ultimate outcome of the conducted stakeholder analysis. While planning future steps the network may address relevant stakeholders in an efficient way.

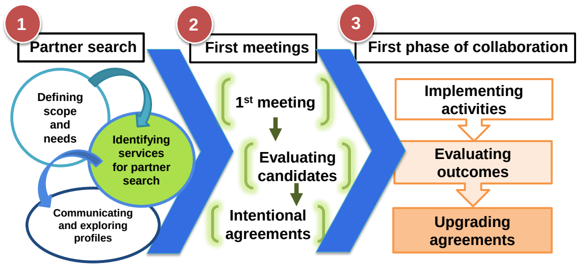
The benefits of using a stakeholder analysis and management as a regular approach:

- Opinions of the most powerful stakeholders might be used to shape future activities at an early stage. They will have the possibility to support the project and improve its quality.
- Gaining support from powerful stakeholders can help winning more resources.
- By communicating with stakeholders early and frequently, networks ensure that they fully understand reasons for projects and understand the benefits of projects.
- Networks may anticipate what other's reaction to new initiatives may be, and build action plans that will win their support.

More information and discussion papers regarding stakeholders' analysis can be found in the following sources :

"Stakeholders analysis guidelines" by Kammi Schmeer; Stakeholder Analysis by Sustainable Management Development Program; Stakeholder Management by The Open Group and Stakeholder analysis toolkit by Manchester Metropolitan University. All these sources include complex description of approaches to the process and extensive matrix examples.

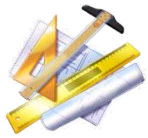
1.3 Identifying services for partner search



Another step in matchmaking and partner search would be to map the possible partners, in other words to search for relevant candidates with potential for fulfilling our identified needs, and to analyse which of those identified institutions will be the most relevant for our network.

While the stakeholder analysis is initially dedicated to those who already are a part of the network, the mapping in matchmaking helps to identify a broad portfolio of potential stakeholders "to be".

Mapping is produced with input from initiation partners, their available contacts, web search and searchable databases, event and workshops.



There exist a number of possible tools which might be used in partner search. This chapter is dedicated to basic analysis of those electronic information sources and tools to use.

Table 4: Tools for partner search

Name (click on the active logo below to follow)	Usability for matchmaking	Basic characteristics	Public/ private	When to use?
e-Match	C2C – low C2B – medium B2B – high C2Research – low	The eMatch platform is a tool for partner search and profiling, mostly in the ICT and digital media. Services: • Partner search: enables filtered searches based on your specific needs. • 2500 profiles of innovative companies in Norway and Europe. • Match-making events organisation (including content syndication, physical and virtual events, one2one matchmaking, unilateral matchmaking searches, etc.). • Supports organization of match-making events • R&D project initiatives: could initiate R&D projects on behalf of a partner consortium.	Commercial	Looking for partners and events particularly in emerging technology areas: • Language technologies and semantics, • Green ICT • Modern publishing technologies, • ICT in the building / real estate sector.
European Commission ENTERPRISE EUROPE	C2C – none C2B – high B2B – high C2Research – high	Europe's largest database of cutting-edge technologies, containing more than 23,000 technology profiles. It is updated weekly by close to 600 partner organisations in 50 countries.	Public	Used for: • Development of SME in new markets, • Sourcing or licensing new technologies, • Accessing EU finance and EU funding.
EUROPE INNOVA World-class clusters at your fingertips	C2C – high C2B – none B2B – none C2Research – limited to - cluster related research	The European Cluster Observatory is an online platform that provides a single access point to information and analysis of clusters and cluster policy in Europe.	Public	Used for: • access to advanced data set on clusters and regions in Europe, • post information about events in cluster community, • Access videos and other educational materials, • Gaining information about regions, sectors, organisations and networks. • source of cluster-related documents.

B2Match The speed-dating Software	C2C – none C2B – none B2B – high C2Research – none	On-line software platform created to support, design and organize international matchmaking events.	Commercial	Used for: Support and guidance in designing and organization of matchmaking events including website updates, mailings, scheduling, feedback and other services.
EUROPEAN CLUSTER ALLIANCE	C2C – high C2B – none B2B – none C2Research – none	Dedicated for clusters, meta-clusters and public agencies supporting cluster policy.	Public	Established in order to: • share the experience gained so far in cluster policies, • facilitate a true policy dialogue, • elaborate and exchange new ideas and practical tools, • raise the level of excellence and efficiency of cluster policies.
TCI	C2C – high C2B – limited B2B – none C2Research – limited to - cluster related research	The Competitiveness Institute - TCI is the leading global network for practitioners, policy makers, researchers and business leaders working towards improving competitiveness in regions and clusters.	Commercial	Used for: • News, information, trends, knowledge and best practices in clusters, competitiveness and innovation systems on a global level, • Networking with leading actors, potential cooperation partners and regional initiatives in the area of clusters and competitiveness.
ClusterCollaboration.eu	C2C – high C2B – limited B2B – none C2Research – limited to - cluster related research	Provides online quality information and networking support for clusters (organisations and members) aiming to improve their performance and increase their competitiveness through the stimulation of trans-national and international cooperation.	Public	Used for: • Mapping, benchmarking and profiling of cluster organisations, • Information on matchmaking events, • Mapping and profiling of cluster members, • Establishing communities, • Finding project ideas and financing sources, • Adding news, events, docs and getting information by users.
cluster-excellence.eu	C2C – high C2B – limited B2B – none C2Research – limited to - cluster related research	A network of experienced persons and organisations in Europe to identify and set up a meaningful set of quality indicators and peer-assessment procedures for cluster management.	Public	Used for: • promoting cluster management excellence, • diffusing the adoption of the Quality Label among its members.
European Commission CORDIS Community	C2C – none C2B – high B2B – high C2Research – high	Community Research and Development Information Service, is an information space devoted to European research and development (R&D) activities and technology transfer.	Public	Used for: • facilitating participation in European research and take-up activities; • improving exploitation of research results with an emphasis on sectors crucial to Europe's competitiveness; • promoting the diffusion of knowledge fostering the technology take-up to enterprises and the societal acceptance of new technology.
b2fair International Business Cooperation / enterprise europe network	C2C – high C2B – high B2B – high	b2fair is the matchmaking platform for trade fairs and conferences- combining matchmaking with attending international	Commercial	Used for: • the preparation of the event and meetings tailored to the

	C2Research – high	trade fairs and conferences all over Europe. Evolved into an international partner network with a growing number of matchmaking events on leading international trade fairs and conferences.		individual needs of the participants, • support during the event, • follow-up activities.
LinkedIn	C2C – high C2B – high B2B – high C2Research – high	As of August 2, 2012, LinkedIn operates the world's largest professional network on the Internet with more than 175 million members in over 200 countries and territories. LinkedIn corporate hiring solutions are used by 85 of the Fortune 100 companies. More than 2 million companies have LinkedIn Company Pages.	Commercial	Used for: • Advertising your own institution and network, • Hiring solutions, • Marketing solutions, • Search for people, companies, institutions.

Source: Oxford Research AS

Additional sources of possible matchmaking contacts may be identified through specialized networks operating at European level, being a membership organisations (associations) designed for special purpose. This would for example be:

- Innovation networks for policy makers, e.g., European Regions Research and Innovation Network ERRIN, The European Association of Development Agencies Eurada, and European Network of Innovation Agencies - Taftie.
- Industry specific networks mainly designed to foster cluster organisations, e.g. European Aerospace Cluster Partnership, European Automotive Strategy Network, Eco-Innovation Cluster Partnership for Internationalisation and Growth EcoCluP, Advanced Biotech Cluster platforms for Europe ABCEurope, etc.

Finally additional help regarding the matchmaking may be delivered through international offices, embassies and bilateral trade associations. Such institutions can be useful in providing specific local information and contacts.

1.3.1 Matchmaking events

The term 'matchmaking' is used here in the context of matchmaking events.

Matchmaking events are considered as one of the most effective methods of making new business contacts and networking, and therefore highly suggested also in the context of these guidelines.

Chuck Ashman, CEO of Business Matchmaking[3], facilitates buyer/seller meetings, workshops and training materials for businesses in US, with 75,000 face-to-face appointments organised (matchmaking meetings) resulting in 6 to 7 billion dollars in contracts. As a matchmaking guru among the small business industry his mission is to connect small business with government and large businesses.

Relevant examples for networking in the networks of clusters would be events advertised in the above mentioned services for clusters and their businesses.

Matchmaking events in pure meaning are events organised with the purpose of meeting possible business partners in a sequence of short arranged meetings, enabling the participants to introduce themselves and look for possible areas of cooperation.

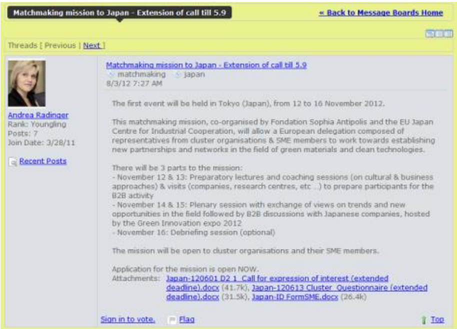
In the real life situations the basic concept is of course often modified. In most of cases such events are connected with organised larger conferences, using the opportunity of having experts from one market, sector or industry gathered in one place over a number of days.

[3] http://www.thebusinessmakers.com/episodes/shows/2010/may-2010/episode-256/chuck-ashman-2010.html

An example of such matchmaking event from Enterprise Europe Network's brokerage event work during the global media tradeshow IBC in Amsterdam might be found here with a relevant video.

Another example of the match making event –'Matchmaking mission to Japan' announcement from Cluster collaboration platform, brings an interesting overview of how such events are organised in the context of competitive and innovative clusters and what are the expected outcomes for participants.

Click on the picture to obtain more information



Matchmaking mission to Japan - Extension of call till 5.9

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Andrea Radinger
Rank: Youngling
Posts: 7
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Matchmaking mission to Japan - Extension of call till 5.9
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The first event will be held in Tokyo (Japan), from 12 to 16 November 2012.

This matchmaking mission, co-organised by Fondation Sophia Antipolis and the EU Japan Centre for Industrial Cooperation, will allow a European delegation composed of representatives from cluster organisations & SME members to work towards establishing new partnerships and networks in the field of green materials and clean technologies.

There will be 3 parts to the mission:
- November 12 & 13: Preparatory lectures and coaching sessions (on cultural & business approaches) & visits (companies, research centres, etc ...) to prepare participants for the B2B activity
- November 14 & 15: Plenary session with exchange of views on trends and new opportunities in the field followed by B2B discussions with Japanese companies, hosted by the Green Innovation expo 2012
- November 16: Debriefing session (optional)

The mission will be open to cluster organisations and their SME members.

Application for the mission is open NOW.
Attachments: Japan-120601 D2 1 Call for expression of interest (extended deadline).docx (41.7k), Japan-120613 Cluster Questionnaire (extended deadline).docx (31.5k), Japan-ID FormSME.docx (26.4k)

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Below we additionally present a case study describing how matchmaking event used consciously influence development of innovative businesses.

Cruise ship ceilings offer perfect backdrops for painted skies,

A three-person company based in Carinthia, Austria, has developed an ecological process for painting starry skies onto ceilings. Using night glowing colours and no phosphorus, the Starseed painting of the Milky Way and the Big Dipper are Top Impex's hot new product aimed at the hotel industry, and private and old people's homes.

It is claimed that these starry skies have a calming effect on residents suffering from dementia in old people's homes. Business was healthy but CEO Walter Jakobitsch was looking for new markets in the shipbuilding and hotel sectors across the border with Italy. The huge shipyards of Fincantieri, near Trieste, offered plenty of cabins to paint but the cruise ship market is difficult to break into.

Jakobitsch approached his local Enterprise Europe Network branch, the Economic Chamber of Carinthia, Klagenfurt, to help him develop commercial links. Network expert Elisabeth Hauer invited him to a business-to-business matchmaking event in Klagenfurt in 2009 for the Alpe Adria region. "We know Top Impex well," she says. "We've worked with them for many years, helping them find new distribution partners."

There, Jakobitsch met Sabina Dandrich from Aries, the Enterprise Europe Network branch in Trieste, and she introduced him to a number of clients, including Holiday SAS. She says: "Holiday SAS are the largest subcontractor of Ficantieri shipbuilders. They work in cruise ship and hotel signage, and the two were a perfect fit." Top Impex now has exclusive rights for cruisers and hotels in the North East of Italy. "Thanks to the meeting, it all went very fast – bang, bang, bang," Jakobitsch says. "I wouldn't have met these ship builders without the Network's help."

For other success stories on how such events work in reality with encouraging examples please refer to:

Medical Healthcare Brokerage Event, Taking ideas from the lab to the plate or Guided tours for the digital age.

Participation in the matchmaking event

In order to make our matchmaking event in the future being successful, it is important to be well prepared and follow up the most promising conversations.

While there is no standard guaranteed recipe for success, practices described below should help you get the most out of your business matchmaking experience.

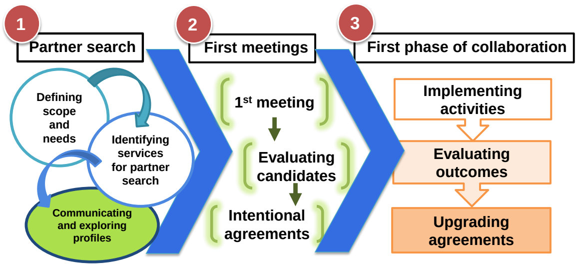
Matchmaking event checklist[1]:

☑ **Do your homework** – The networks, clusters, corporations and regional and government agencies represented at various matchmaking sessions are in most of cases fairly transparent. You need only to spend a few minutes of online research to gain an understanding of your interlocutor strategic plans and priorities. The organizers of a matchmaking event will provide each registered participant with a list of appointments and the entities with whom the meetings are matched. It is important to be prepared to make the most of the 15-30 minute matchmaking sessions.

☑ **Lead with your value proposition** – The matchmaking events are sometimes described as "speed dating for business." Very much like speed dating, managers have only a brief few minutes to make a lasting impression on the person across the table before the bell rings and they are ushered off to the next encounter. The best way to quickly catch the interest and attention of a buyer is to lead with your value proposition, ideally in a way to speaks to that buyer's needs. Instead of saying "…what is my company looking to buy…", you must lead with "here are the products/services that I offer; here is what distinguishes my business; and here is what I can do for you …" Make it easy for the person you meet to help you by crisply identifying where your solution lives in the enterprise, and what are you looking for/offer.

☑ **Manage the follow-up** –We must remember that the persons we meet may be meeting with dozens of other people that day, and that many have travelled in for the matchmaking day. It is a good idea to pass on your documentation on electronic media (e.g. CD or USB drive), or to offer to e-mail any documents after the matchmaking session. This also makes it easier for the potential partner to share your information with others in the organization. Before you leave the table, be sure that you have determined the mode of follow-up, if any. It is fine to simply ask "how should I plan to follow-up with you?" Finally as you do follow up, feel free to be "politely persistent" and "amiably aggressive."

1.4 Communicating and exploring profiles



This step of guidelines is to result with a short list of identified new partners, exactly suitable for our needs and situation.

Prequalification of partners relevant for further projects in the network can be broad, or specific. It can be evaluating their potential and characteristic versus other identified partners, or examining specific aspects within each organisation, such as the availability of funding; historical performance; management openness or the organisational structure and flexibility.

The initial stakeholders' analysis is likely to have pinpointed some aspects of the network's activity that merit a close inspection and further development. The process might go much deeper engaging such tolls as technology mapping, foresight exercises, identifying skill gaps and detailed export market research in target markets. All those are activities that could be driven by the network management approach later on, using teams built with members from initiating stakeholders, with support from the supporting agencies or external consulting. But let's come back to simpler tools.

Valuable information required for identification and prequalification of potential partners is often held by the more internationally orientated members. Multinational stakeholders within the initiative will have a good understanding of similar locations around the world; academics will have a complimentary information regarding research 'hot spots' around the world; migrants may have come from similar companies or institutions; some of the core and support firms may already be selling to/sourcing from identified partners.

However, the objective for these guidelines is to present a usable solution which can be implemented as a follow-up of the search for partners phase introduced above. Most of the issues that are to be analysed in this step are qualitative rather than quantitative. In order to organise the prequalification process in a systematic manner, we might consider analysing the following criteria:

- statistical information identifying past and current performance of the potential partner and changes over time,
- their approach to workforce development,
- approach to collaborative market research and open innovation,
- approach to market development, internationalisation, links with related clusters and networks in other countries; migrant attraction,
- location, availability of communication means,
- transport, logistics infrastructure,
- partner branding in the region or internationally,
- access to capital, seed funding, venture capital,
- availability of physical infrastructure: research facilities, science parks, incubation facilities; in some environments the existence of export processing and special economic zones,
- access to specialised competencies, approach to technology transfer,
- participation in business networks, firm-to-firm links, established consortia,
- responsiveness and support from public agencies, national, regional and local government,
- availability of finance for the networking initiatives,
- experience in collaborative projects.

Prequalification check list:

☑ Meet the potential partners (using match making events or other occasions)

☑ Gather required information about potential partners from available sources

☑ Create an analytical matrix that will allow for criteria-based pre-qualification

☑ **Compare results with the needs identified previously in the needs analysis**

☑ Address the most relevant identified partners first, with a proposition of cooperation appropriate to their profile

☑ Propose subsequent meeting to start the collaboration with those identified partners within the network.

The presented below example describes how such approach is deployed as a structural service offered by cluster organisation in Austria:

Ecoplus -Food Cluster of Lower Austria experience in matchmaking

Innovation through cooperation is the secret of success for more than ***530 collaborative cluster projects****. Ecoplus supports collaboration among companies as well as with R&D and qualification facilities. Ecoplus makes access to national and international programs and projects possible. We also take on time-consuming organizational tasks on behalf of companies, thus enabling even small and medium-sized enterprises to engage in application-oriented R&D at the highest levels.*

Cluster managers activities are directed towards:

- *initiation, guidance and management of R&D-related, collaborative projects*
- *acting as interface to funding providers*
- *helping in identification of cooperation partners*
- *processing requests from abroad regarding cooperation partners*
- *bringing companies together with topic-specific international networks*
- *providing stimulus for innovative product development and research projects*
- *establish contact to research facilities.*

Chapter 2. Initial meetings

A natural step following the wide process of partners' identification and prequalification is to organise effective meeting, initiating the cooperation with the selected partners. This chapter is dedicated to provide guideline for such meeting preparation.

The Clustering Initiatives Greenbook revealed that the most common reason for the failure of clustering initiatives was the lack of consensus on the cluster's direction, this is also underlined in the "Stardust evaluation of pilot projects" conducted in February 2012 in cases of almost all pilot projects. A **core element in shaping the cluster's direction is the establishment of a shared vision**, a preferred future, for the cluster. The preferred future needs to excite and capture attention. Broad, high-level agreement is needed around this vision for it to be actionable. In case of Stardust projects the main goals have already been set, but lack operationalisation and common uptake by partners. Still, the process of network development for Stardust pilot projects will differ from classical approaches for totally new identified clustering initiatives.

In this context (week internalisation of initiative main goals), new established and developing networks may face difficulties in acquiring new members, also because the possible cooperation and partnership benefits are not immediately visible, and main objectives are set with the top down approach. Therefore planed and effective introduction into concrete cooperation projects can be especially useful in convincing potential partners of the benefits of partnership. The presented concept based on the strategy of reaching the so-called 'low hanging fruits' has proven to be successful in many cluster initiatives around the world.

But before presenting more guidelines for the meeting organisation and action plans, it is necessary to discuss the possible differences between stakeholders which may hinder future cooperation.

2.1 CAGE Framework

In setting international collaboration it is extremely important to take note of the differences between partners. In order to create a working partnership it is good to understand how differences are influencing possibility of cooperation, analyse them and use them concisely.

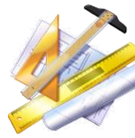
The CAGE distance framework is a concept introduced by Professor Pankaj Ghemawat from Harward Business School.

The whole concept is based on the simple equation: the more two countries differ across CAGE dimensions, the riskier cooperation will be. By contrast, similarities along these dimensions suggest great potential. Common currency, for example, boosts trade more than 300%. Also, types of distance affect industries differently. Religious differences, for instance, shape people's food preferences, but not their choices of cement or other industrial materials.

The (CAGE) distance framework helps managers identify and assess the impact of distance on various industries. Distance between two countries can manifest itself along four dimensions; **cultural, administrative, geographic and economic.**

Managers must always be conscious of distance- in all its dimensions. CAGE framework is intended to help managers meet that challenge. Each component present different challenges and opportunities and provides useful way of grouping unilateral influences on cross border interactions, specific to particular countries, plus those specific to particular country pairs. Thus, **framework highlights that 'would-be-internationalisers' should first go to countries with least psychic distance** (least distance between home market and foreign market) from result of understanding cultural and business differences.

The table displayed below provides more detail on each of the CAGE categories, and how they can manifest themselves depending on whether one is comparing a pair of countries or looking at one in isolation. One of the distinctions between the CAGE Framework and other country analysis frameworks is its inclusion of bilateral as well as unilateral factors taken into consideration. For an online commercial tool for comparing country



differences based on CAGE framework you may consider visiting CAGE Comparator.

Table 5: CAGE framework

	Cultural Distance	Administrative Distance	Geographic Distance	Economic Distance
Country Pairs (Bilateral)	• Different languages • Different ethnicities; lack of connective ethnic or social networks • Different religions • Lack of trust • Different values, norms, and dispositions	• Lack of colonial ties • Lack of shared regional trading bloc • Lack of common currency • Political hostility	• Physical distance • Lack of land border • Differences in time zones • Differences in climates / disease environments	• Rich/poor differences • Other differences in cost or quality of natural resources, financial resources, human resources, infrastructure, information or knowledge
Countries (Unilateral / Multilateral)	• Insularity • Traditionalism	• Nonmarket/closed economy (home bias vs. foreign bias) • Lack of membership in international organizations • Weak institutions, corruption	• Landlockedness • Lack of internal navigability • Geographic size • Geographic remoteness • Weak transportation or communication links	• Economic size • Low per capita income

Source: Redefining Global Strategy: Crossing Borders in a World Where Differences Still Matter, Pankaj Ghemawat, Harvard Business School Press, 2007, p.41

Cultural distance

Culture happens to be the first facet of CAGE, in terms of the acronym, but it also can be the most practically perplexing facet for managers. Culture is sometimes referred to as the software of the mind, in that it has a sometimes invisible but indelible in-fluence on people`s values and behaviours. Cultural distance, then, has to do with the possible differences existing in relation to the way individuals from different countries observe certain values and behaviours.

A number of researchers have identified significant cultural differences among countries. Distinct cultural differences are observed around the following dimensions: power distance (the extent to which individuals accept the existence of inequalities between subordinates and superiors within a hierarchical structure); uncertainty avoidance (individuals` willingness to coexist with uncertainty about the future); individualism (how the individuals in a society value individualistic behaviours as opposed to collective ones); predominant values (regarding quantity or quality of life, that is, whether more importance is given to material aspects or a stronger emphasis is laid on interpersonal relationships); and long-term or short-term orientation (the focus on future rewards or the concern about the maintenance of the stability related to the past and the present).

Administrative Distance.

Administrative distance reflects the historical and present political and legal associations between trading partners; for example, colonial ties between trading partners, or participation in common trading blocs. This facet of CAGE asks you to examine whether there are historical or current political factors that might favour or impede a business relationship between a company and a new country market. NAFTA, for instance, decreased the administrative distance between U.S. firms and Mexico and Canada. Similarly, historical political hostilities between the United States and Cuba make it virtually impossible (and illegal) for most U.S. firms to do business there. Trade practices between countries can be significantly affected by laws and regulations enacted at the national or international level. Because they affect fundamental business practices, they often affect the competitive position of firms as well.

Geographic Distance.

How far apart are trading partners in physical terms: the size of the country, differences in climates, and nature of transportation and information networks? You can think of geographic distance as absolute, in terms of the miles or kilometres that separate a firm from another market or supplier. Technology and the Internet, however, has shrunk distance in terms of transportation time, and now with digital products and services, almost entirely eliminated geographic distance as a constraint of trade between some markets.

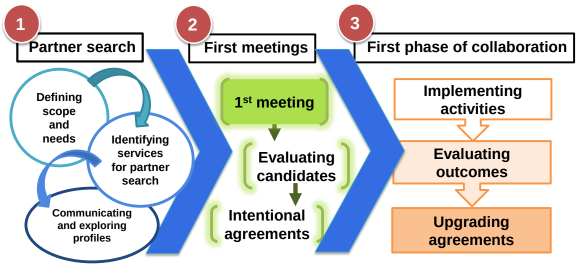
Economic Distance. Finally, economic distance captures fundamental differences relating to income, the distribution of wealth, and the relative purchasing power of segments of a geographic market. This has been one of the biggest barriers, for instance, in the way of U.S. firms` success selling products in emerging markets. In global terms, this is the four billion people who live on less than $2 per day. The phrase "bottom of the pyramid" is used in particular by people developing new models of doing business that deliberately target that market, typically using new technology. An example of a product that is designed with the needs of the very poor in mind is that of a shampoo that works best with cold water. Such a product is marketed by Hindustan Lever (part of the Unilever family of firms).

Application of the CAGE framework requires network managers to identify attractive partners in the context of some selected criteria. To demonstrate with a simple example how CAGE will influence decision making - a firm maybe most interested in markets with high consumer buying power, so it uses per capita income as the first sorting cue in the CAGE analysis. This would result in some type of ranking.

Of course any internationalisation would still need to be backed up by the specific resources and capabilities possessed by the network, regardless of how rosy the CAGE analysis paints the picture.

For more – an available online version of the relevant chapter from "Distance Still Matters - tool kit" by prof. Ghemawat.

2.2 The first meeting



The process of acquiring new partners starts with an invitation to an initiating gathering on a specific topic/project idea. In the follow-up workshops/meetings, the presented content and topics discussed at the first meeting are deepened and cooperation ideas are developed together with interested participants (a natural selection process is taking place, as the cooperation develops). Participation in a concrete cooperation project bounds later to a full network membership.

In order to deliver real results which can be noticed by partners, the whole process from initial informative meeting to first cooperation results and membership generally shall be concentrated into a limited number of months.

In order to organise the initial meeting with the relevant identified partners, network initiating organisations must develop a programme for the meeting and invitations, which will have the ability to attract potential partners.

Based on the stakeholders' analysis and prequalification of partners it is also wise to shape this phase of initiating collaboration by proposing to different actors (e.g. research institutes or businesses) participation in relevant subgroups during the initial meeting. Those subgroups work with ideas of future projects where their organisations' profile might be useful.

Invitation:

In order for the invitation to be successful, it must be:

- Personally addressing the relevant person identified earlier,
- Supported by reference from the matchmaking meeting or another reference from the past (e.g. matchmaking event),
- Supported by recommendation from another company, if possible or relevant.

A very reasonable approach is to send an invitation signed jointly by the representation of initiating partners. Sending of a joint invitation may help avoid misunderstandings with already established partnerships.

In addition, an invitation is perceived more seriously if supported by/involving a well-known institution or person.

Meeting preparation check list:

Managing the invitation process - tips for meeting coordinator:

- ☑ Create detailed list of participants including all contact details, titles, positions and additional (context) information.
- ☑ Use excel or on line database tools (some were described in chapter 1.3 Fel! Hittar inte referenskälla.) to manage this database. Hand notes will make it much more difficult to coordinate later on, and to share the status with other organizers.
- ☑ Create draft of the invitation.
- ☑ Consult the draft invitation with other initiating partners.
- ☑ Consult appropriate date for the meeting (check national holidays- they differ!).
- ☑ Send out only personal invitations.
- ☑ Send invitations a few weeks before the meeting is scheduled.
- ☑ Request participation confirmation in the invitation.
- ☑ Monitor confirmations and contact those who did not respond directly around two to one week before the meeting, maybe they change their mind after a direct phone call.

As discussed before, the fact that network collaboration must be perceived as valuable for the possible partners, also the programme of the initiation meeting shall be built upon some attractive selling points, which will sell the whole idea to the participants.

Programme and tips:

The possible content of the initial meeting:

- Content: Presentation of network and the benefits and possibilities it offers
- Goals: First information on concrete topics/project ideas and contacting potential partners
- Information about financing possibilities within new created joint projects.
- Talks and round table discussions

An example of possible idea for the first meeting in Creative Industries Cluster presented below, gives an overview on how to shape the initial meeting with a different idea of organising a training session that is particularly relevant for targeted sector.

On 24 February 2011 the meeting with representatives of local creative industries was held in Gdansk, initiating future cluster forming. Within the framework of the meeting participants took part in workshops "Canvassing of customers by creative industries". The main goal of workshop was transfer of knowledge and practical skills in canvassing customers, which are the factors for developing local competitiveness.

After workshops participants had a great opportunity to present their business activity in front of wide audience, during Demo Day-Young Business Exchange. Thanks to Demo Day CI representatives could also establish new cooperation relations, exchange experiences and ideas for further development of creative industry in Gdańsk.

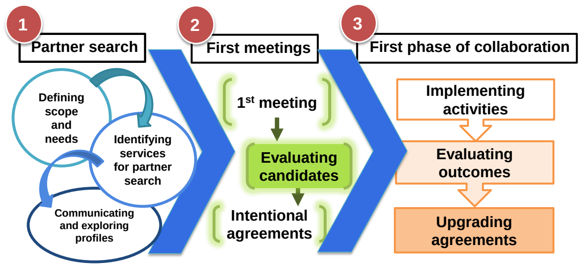
It was also opportunity to present Creative Cities programme to local community.

Successful and inspiring networks' meetings are in most cases gathering a reasonably big audience, therefore there are many speakers to share stories and experiences that are focused on whatever aspect one may possibly try to emphasize.

In order to make this meeting focused:

- ☑ Be sure you are clear about what is your main objective for the meeting
- ☑ Avoid having people stand up and give long reports, especially ones that include tables of statistics.
- ☑ Use of inspiring quotes, pictures, and symbols referring to the regional potential is a good way to build a sense of unity at the beginning.
- ☑ Include action planning session at the meeting. For example, small groups of participants may work on an action plan for implementation of the projects that are supposed to follow up this meeting, assigning also responsible coordinators.

2.3 Evaluating and follow-up with new identified partners



The initial meeting, gathering identified partners will be an excellent occasion for further identification of cooperation possibilities. The necessary step to be undertaken after the meeting is to follow up new participants.

Pilots' management group shall contact representatives of the new approached organizations in order to investigate their opinions regarding the proposed platform for collaboration, possible detailed projects proposed and their foreseen participation.

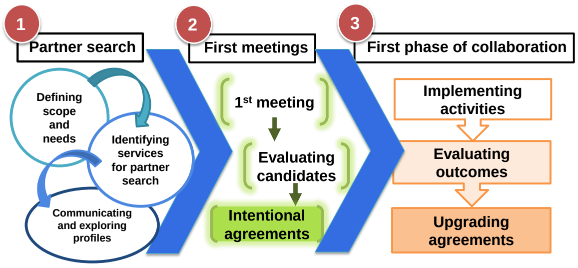
In this way, network's action plans might be further adjusted and enhanced, taking into consideration input from newcomers. New participants are given short time (a number of days) for reflection, and are asked to express their opinions as a follow up of the conducted meeting.

Some of the new identified organizations will also withdraw their interest, reasons for that shall be investigated, as the learning from such situation might influence network ability to acquire new partnerships in the future.

The same situation may also arise from the side of pilots' management. The initial workshop may reveal reasons for some new partners to be excluded from further cooperation due to various reasons. For example particular IPR issues may appear, possibly conflicting with other partners in the network. Sensitive personal factors might be also an important reason for not continuing cooperation.

Pilots' management shall undertake decisions to this regard consciously and taking balanced decisions based on a thorough analysis of circumstances.

2.4 Intentional agreements



Following another two or three purpose-oriented meetings within the initiative, the new partners shall be more formally engaged in the actions undertaken in the network.

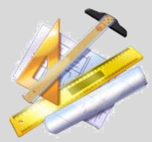
For this reason, management of the pilots may propose to sign a letter of intent, setting the first official intentional agreement between parties.

In the following boxes we present examples of such letters, developed in working initiatives.

Example 1 – based on LoE from MED PORTS - Development of clusters in port logistics services of the Mediterranean Basin Invest In Med.

LETTER OF INTENT FOR COOPERATION

Between



… (insert name of the body 1)

(members of the network)

And

… (insert name of the body 2) (new stakeholder)

Within the framework of the initiative (name of the pilot initiative) ……….., financed by the European Union Stars programme, with Star Dust being an Interreg-funded project related to the EU strategy for Baltic Sea Region, with the scope of developing an effective cooperation, in accordance with our mutual interests in implementing actions aimed at supporting the … (insert area of pilot initiative activities) and for the purpose of establishing a long-term mutually beneficial association:

…(insert name of the body 1),

and

… (insert name of the body 2),

sign in the following letter of intent.

The signing parties are committed to work together with the purpose of reaching goals defined for the pilot initiative and implement joint actions designed on mutual basis.

This letter of intent is to provide formal basis leading for the successful operation of the actions undertaken. In the future parties will precede with deepening cooperation leading towards a formal strategic agreement fulfilling the spirit and purpose of this general letter of intent.

Signatories

Example 2 - based on LoE used in Medical Cluster "MEDCLUSTER" Poland.

LETTER OF INTENT

Concerning cooperation between ……….(name of the Pilot) and (name of the new stakeholder)

Preamble

Acting in the spirit of partnership, both parties intend to extend and strengthen existing connection for their mutual development for the benefit of ……….(fill in) The Parties agree as follows:

§1

Aiming to (fill in)…………., and bearing in mind socio-economic conditions as well as regional economy, both parties initiate action to strengthen their cooperation in the field of (fill in)………….,

§2

Parties in their activities will seek to concentrate and support their efforts in order to achieve following objectives:

1. Promotion of (fill in)………….,

2. Collaboration on new projects, aiming to support and develop (fill in)………….,

3. Sharing of good ideas in the field of building and development of cross-regional entrepreneur agreements

4. Organization of joint training and conferences in the field of (fill in)………….,

§3

Detailed rules of collaboration and ventures raised upon this letter of intent, will be regulated during realization of specific activities. This letter of intent does not entail any obligations for either party

§4

People responsible for coordination of activities raised in this letter as well as other arrangements, are:

(fill in)………….,

§5

Letter of intent was written in two copies, one for each party.

Signatures

2.4.1 IPR contract guidelines

In some cases at this stage new partners may face the need for clarifying their approach towards the protection of Intellectual property rights which may result from the cooperation in joint undertakings within the pilot's activities.

The survey undertaken by Innovation Norway within the project 'Intellectual Property Rights for clusters' in the framework of NCE and Arena revealed a number of central key issues in the context of IPR protection in cluster initiatives:

- Building trust is central for all clusters and their networks. Therefore highlighting how IPR can be used as a tool for trust building was vital.
- There is a wide array of sectors with highly varied IP competence levels, both within and between the initiatives.
- The majority of analysed initiatives had not considered and/or addressed important IP issues
- Project level IP is rarely considered in clusters.
- Formal Intellectual Property does not cover all the needs of the clusters, we must cater for Intellectual capital within the project, to ensure that all Intellectual Assets are catered for.

It is recommended that all clusters and network of clusters go through the process of creating an IP policy. It can contribute to build trust among cluster members, prevent difficult discussions in the future around issues of ownership and reduce the risks in the commercialisation processes.

There are two facets to be considered:

1. Ensuring a professional approach to cluster IP management as a cornerstone for building trust within the initiative, thus creating an environment for the development of collaborative projects. Networks in their ideal sense are innovation environments based on teamwork and trust. A professional approach to IP fosters trust within the group. When members are within a group which respects their individual IP, this should contribute to greater levels of sharing within the initiative.
2. Identifying what falls into collective IP; jointly owned IP and individually owned IP and planning for how the initiative will handle these rights.

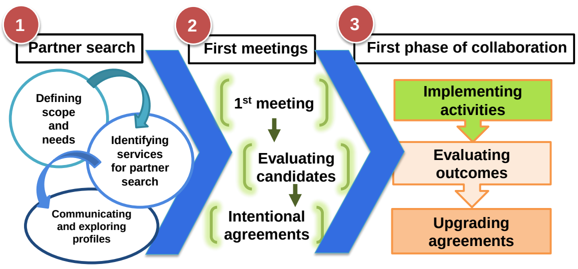
In order to support cluster initiatives the report available at Innovation Norway web-site provides detailed guidelines on how to manage this process in the initiative (click the logo below to follow).

In order to help cluster initiatives and networks of clusters to effectively handle the intellectual property issues European Commission created a public service offering full support to this regard.

The European IPR Helpdesk offers free of charge, first-line support on IP and IPR matters to beneficiaries of EU funded research projects and EU SMEs involved in transnational partnership agreements, especially within the Enterprise Europe Network (EEN).

Chapter 3. First phase of collaboration

3.1 Implementing activities[4]



3.1.1 From Action Plans to Actions

A portfolio of possible projects should be under parallel development after initial meeting, though resource limitations will require that priorities are identified, indicating which projects are to be implemented in the first row. Competition can play a significant role in stimulating each project team to move forward to action plans. Rivalry between groups is a positive factor, but it needs be managed to ensure that it doesn't become destructive. Working simultaneously on multiple fronts enables cross-cutting issues to be identified, and then addressed. Not all initiatives will bear fruit; the initial focus needs to be on low risk/early return initiatives. Larger, longer-term projects are better introduced as 2nd generation initiatives after the group has achieved some positive results.

With the key objectives identified in the pilot's strategy the next step is to identify the initial actions that will start moving the initiative towards established collaboration. The emphasis shall be made on short term, tactical initiatives that will not require substantial investment. As already mentioned, initiatives requiring more substantial resources with a longer term pay-off shall be addressed later.

The concept of low hanging fruit: These are the relatively easy initiatives that do not require substantial resources, and deliver early (albeit probably small) wins. They are the quick hits, the tactical first generation initiatives, rather than long-term major impact initiatives. These short term activities are seeking quick results that alleviate immediate pressure points within the initiative. The networks should demonstrate the value of early collaborative action. The priorities need to be determined by passion; if there is no passion to participate in their implementation then the issue should be put to one side. Ideally the network main facilitator should not by default take responsibility for all the implementation activities. It is important at this early stage that the initiative does not over-extend, engaging in more than it can resource. There is unlikely to be an open budget to fund a wide range of projects. Large projects may need to be broken down into smaller steps that are easily achievable. It can be easy for a cluster to get ensnared in addressing national issues facing its sector, or generic local issues. The clustering initiative should focus on what can be achieved locally and within the resourcing that is at hand.

Action plan should include:

- ☑ an outline of the activity;
- ☑ defining the expected results;
- ☑ identifying the resources that are needed;
- ☑ the timeline and key milestones;
- ☑ definition of resources indicating those with specialised skills, contacts, knowledge and passion to participate in driving the particular project.

This action plan is not producing a 'wish list' in the hope that others, particularly from public agencies, will move on the prioritised activities. Responsibility for action needs to be equitably shared amongst the stakeholders, working collaboratively through short term task forces.

The role of coordinator/facilitator of the pilot

The facilitator needs to create an environment that encourages those with passion for an issue to step forward. If no one within the network has the energy or interest to address an issue/opportunity, then it simply remains on a 'to-do' list owned by no one. The facilitator should be cautious in taking responsibility for driving issues in default of an issue champion stepping forward,

[4] The action plan section was developed with use of "Cluster Development Manual
From Clumps & Clutter To Innovative Clusters" by Ifor Ffowcs-Williams; Cluster Navigators Ltd, New Zealand, February 2009.

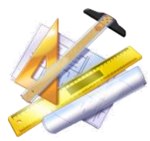
though at times this may be necessary to ensure action. Each task force should have a leader and other supporting members, and if possible include a member from the management of the pilot. Collaborators on each task force should come from different corners of the network, able to draw on different past histories, and able to bring different perspectives. A task force working on an early training initiative should, for example, include both private sector participants and education providers. Task forces work best if the members select themselves; a group of 3-4 motivated individuals is ideal, including in this cross-functional team young leaders. The facilitator may need to be proactive in identifying the right people for a task force, and not leaving it to chance. Task force members need to be working in the area of their passion and strength. The task forces will require support if they run into roadblocks. These temporary task forces need to be focussed, with specific objectives to achieve, and then self-destruct. They are not 'committees' established in perpetuity. Task forces provide a useful opportunity for the network's participants, even competitors, to work together on common projects, and spread the work load across stakeholders, minimising the danger of volunteer burnout. Additional task forces may be built around the passion and capabilities of individuals from within the network who wish to see results in some particular area that broadly ties in with the network's priorities. There is value in setting up some competition between the teams to achieve results; the facilitator needs to ensure that project teams do not encroach on each other's territory. The facilitator has an important role in working with these task forces, supporting them but preferably not acting as the 'Project Manager'. With small scale clusters, and clusters comprised mainly of small businesses, the facilitator may by default have no option but to act as the project manager, and accept that as a result the clustering initiative will be engaging on fewer fronts.

Resources for joint undertakings

The availability of funds/resources to quickly support the early priority initiatives (such as for developing a web site, visiting a trade fair, market visits) is a major plus in speeding an emerging group into action. These funds usually come from a public agency, and do not need to be substantive. A low hurdle to qualify for these funds is a plus.

Early projects may include promotional material such as brochures, developing a web site, visits by potential customers, and cluster visits and participation at trade fairs.

Key principles for success



Clustering initiatives are prone to failure at this critical implementation step, so early action, a tight feedback loop, early benefits is the modus operandi. The more complex, long haul projects should be introduced later, once momentum is in place. Action and analysis need to be balanced; analysis is simply the precursor for action. Establishing a number of task forces is an important means of bringing people together to forge and address a common agenda. The focus is on activities that are given a high priority by the stakeholders, not an outsider. Having a portfolio of task forces reduces dependency on any one initiative, ensures engagement across a broad front, and benefits to a wide range of the cluster's stakeholders.

3.1.2 Knowledge sharing tools

Several methods can be used for promoting knowledge sharing in and across the projects and organizations. One way is using different innovative technologies like social media. Especially for distributed settings, social media helps to establish awareness and provides opportunities for exchanging knowledge.

Social Media Tools for Knowledge Sharing

Using social media for knowledge sharing in organizations, networks of organizations has increased steadily. In the STARDUST project, we have introduced the use of several social media tools in a workshop with pilots to demonstrate their potential in distributed and expert-driven settings. We demonstrated the use of Weblogs, Wikis, Twitter for micro-blogging, Flickr for photo sharing, and Social Bookmarking for saving, managing and sharing weblinks.

These and other tools have been discussed as a means of knowledge sharing in *Communities of Practice* (COP). Wenger, White Smith (2009) have proposed a classifications of community tools in terms of (1) whether tools support more participation or reification, (2) whether tools are synchronous or asynchronous, and (3) whether tools are focused more towards individual identity or group identity. We will briefly discuss some social media tools below and relate them to these dimensions. A more extensive report on the use of social media tools and results of a small study we conducted in the STARDUST project can be found in the **APPENDIX**.

Weblogs (participation, reification / asynchronous / individual and group identity): Blogging offers great potential to reach and interact with partners. Weblogs can be public (external) and with the restricted access (internal). External weblogs support marketing communication and community building, and may involve clients as well addition to the employees and partners. There are many examples of companies where CEOs or other experts blog about the activities of the company or the latest news are published. Internal weblogs foster the knowledge experts within and across the organization. Users can add materials and have the access the content in the weblog, also discussions around the content can be initiated. It is one of the fastest ways for sharing ideas. For instance Seattle Children's Hospital uses blogging for internal knowledge sharing, they keep the manuals in the system by making it easy for clinical staff to find the most recent version of whichever document they need. They also use plugins for sharing the information by pulling information from one blog and sharing it in another one.

In the context of the Stardust, experts in each pilot could use Weblogs to communicate about their activities. A weblog for the whole pilot could pull content from each of the distributed blogs and thereby show a community-based view on the pilot. This could then initiate knowledge sharing by providing awareness about others' expertise.

Social Bookmarking (e.g. Delicious) (Reification / asynchronous / group and individual identity) Social tagging is the process of adding keywords (tags) to pieces of different types of media (resources, like photos, videos, documents, or weblinks) and supporting the systems to become semantic. Tagging is used in the bookmarking when users tag the content which can be later found by the categorization of the content. Such user-generated tagging system is called folksonomy, although still organizations often tend to suggest using pre-defined categories, important terms also emerge in the social tagging process. In the current project employees in the organizations tag different type of content in the social bookmarking tool Delicious by organizing and retrieving the content and encouraging collaboration between the employees and partners. Such tagging of the content increases the findability of the weblogs, creating awareness of current activities, and collaboration in distributed networks.

Wikis (participation, reification / asynchronous / group identity) are usually user-edited web-pages and have the ability to easily create links between wiki pages which enhances the knowledge sharing dimensions (Levy, 2009). Wiki technologies are proposed to support a wide range of work activities within a corporation, including ad hoc and project team collaboration, project management, information dissemination within communities of practice, idea generation, project planning, e-learning, technical support, customer relationship management, and resource management (Arazy et al, 2009; Danis & Singer, 2008). In the Stardust project, the pilots can use Wiki for preparing the documents in collaboration in and across the organizations.

Micro Blogging (e.g. Twitter) (participation / synchronous / individual and group identity): Microblogging is the smaller and shorter version of weblogging, the entry can include only 140 symbols. The most popular technology for micro-blogging is Twitter. In general the main is to tweet about "what are you doing", although in the settings of the enterprises, the shift should be more on "what are you working on". The case study of the Böhringer & Richter (2009) indicated that microblogging supported the creation of the awareness in a company to support collaboration, communication and coordination. In the Stardust project, organizations may use Twitter for sharing latest activities, results, processes or other types of news that are important for partners or clients. An aggregated view of distributed Twitter streams can be shown on a website by using an agreed hashtag (e.g. #stardust).

Photo Sharing (e.g. Flickr) (reification / asynchronous / group and individual identity)**:** People upload and tag photos, make sets of them, share and comment them. In Stardust, employees could take photos of some products, services, prepare different sets of them and share the photos with the partners. In communicating results to the outside world, photos are a good way to capture attention and spark interest.

Sharing knowledge face-to-face

It is important that knowledge sharing using Social Media is supplemented with face to face methods. Ideally, online and offline activities supplement eachother and are tightly integrated (e.g. by agreeing a common Twitter hashtag during a meeting to communicate ideas and results to people that have not been able to join). Below we introduce one method for enhancing cooperation, which has also been discussed in the context of StarDust pilot projects, the use of Open Space Technology.

Open Space Technology approach was created in the mid-1980s by organizational consultant Harrison Owen when he discovered that people attending conferences loved the coffee breaks better than the formal presentations and plenary sessions. Combining that insight with his experience of life in an African village, Owen created a totally new form of conferencing.

Open Space conferences have no keynote speakers, no pre-announced schedules of workshops, no panel discussions, no organizational booths. Instead, sitting in a large circle, participants learn in the first hour how they are going to create their own conference. Almost before they realize it, they become each other's teachers and leaders.

Anyone who wants to initiate a discussion or activity, writes it down on a large sheet of paper in big letters and then stands up and announces it to the group. After selecting one of the many pre-established times and places, they post their proposed workshop on a wall. When everyone who wants to has announced and posted their initial offerings, it is time for what Owen calls "the village marketplace": Participants mill around the wall, putting together their personal schedules for the remainder of the conference. The first meetings begin immediately.

Open Space is more highly organized than the best planning committee could possibly manage. It is also chaotic, productive and fun. No one is in control. A whirlwind of activity is guided from within by a handful of simple Open Space principles.

The most basic principle is that everyone who comes to an Open Space conference must be passionate about the topic and willing to take some responsibility for creating things out of that passion.

Open space conferences can be done in one day, but the most powerful go on for two or three days, or longer. Participants gather together briefly in the morning and the evening to share experiences and announce any new workshops they have concocted. The rest of the day is spent in intense conversation. Even meals are come-when-you-can affairs that go on for hours, filled with bustling dialogue. After a few days of this, an intense spirit of community usually develops that is all the more remarkable considering that participants are all doing exactly what they want.

Open Space conferences are particularly effective when a large, complex operation needs to be thoroughly reconceptualised and reorganised - when the task is just too big and complicated to be sorted out "from the top". On the assumption that such a system contains within it the seeds of everything that needs to happen with it, Open Space provides it with an opportunity to self-organize into its new configuration. For this to work, however, the system's leaders must let go of control so that true self-organization can take place.

Open Space Technology is also a useful tool for any group of people who are really interested in exploring something that they all care deeply about. I look forward to its broad use in organizing communities and exploring public issues.

Open Space has been applied in thousands of meetings around the world with between five and one thousand participants. It can be effectively used by virtually anybody. More information regarding the method can be found at: Open space technology - A User's NON-Guide and "A Brief User's Guide to Open Space Technology "by Harrison Owen.

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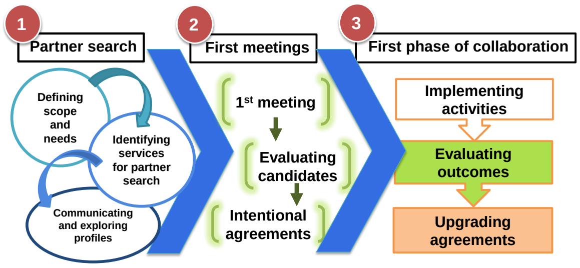
3.2 Evaluating outcomes



Another step in Stardust development model is evaluation of outcomes. It must be noted that this subject is a part of much wider, periodic activity being in the core of network management function. Evaluation of cluster programmes faces particular challenges, due to the hybrid character of clusters which combines elements of various policy areas, and the multidimensional, systemic concept of clusters.

Particular limitations regarding networks' performance evaluation arise both due to the difficulties of measuring their performance and the regionally bounded perspective. On the one hand, the typical dimensions of clusters make macroeconomic modelling difficult; on the other hand, applications of microeconomic methods are confronted with small numbers of observations (if comparing e.g. similar clusters) and/or insufficient data quality.

In order to evaluate basic performance of the pilots at this initial stage of cooperation with the partners, these guidelines present a basic concept for yearly self-evaluation model based on a limited number of questions for which answers are in most cases available without application of advanced econometric models.

The self-evaluation approach may be built upon a number of focus points:

1. The goals for the pilot: Is there a connection between defined goals and the needs of the network?
2. The strategies and Initiatives: Are the strategies relevant compared to the goals? To what extent are the stakeholders mobilised to participate in the implementation?
3. The organisation and anchoring: Does the project management have sufficient capacity, competence and legitimacy? Does the managerial group function as an active and strategic resource?
4. The cooperation and coordination between the parties: Has a better coordination and cooperation been established between the members in the initiative? Has a better coordination and cooperation been established between the industry and R&D in the network?
5. The international orientation: Has the initiative contributed to an increased dialogue with international knowledge environments? Has the network contributed to an increased dialogue with international business partners?
6. Development of competence and learning: Has the initiative contributed to an increased exchange of knowledge and contact with other national clusters/business environments? Has the network established well-functioning arenas for dialogue within the stakeholders?
7. Communication: Does the project's web site function as a good and active channel for communication? How well are the regional means for the communication functioning? How actively are seminars, conferences etc. used to communicate the activities and results of the project?

Most of the above questions might be addressed with use of relatively simple survey to stakeholders in order to see the progress of the initiative. Such approach will be particularly useful, if applied on regular basis, e.g. annually to track change over time. The expected outcome of such qualitative factors' evaluation will be used for shaping network's activities and correct performance towards identified shortages.

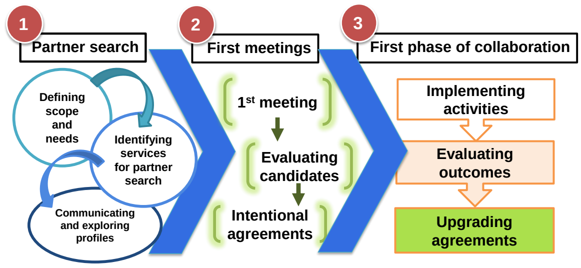
It will also allow for adjusting ambitions of stakeholders, resulting in intensification of efforts in selected prioritised areas without burning resources in action which are not considered as profitable for the members. Discussing answers to questions listed above will also allow partners to verify their own engagement focus and shape their input in the future.

In search for more sound and measurable indicators, which may demonstrate the results of the network's performance over the years in quantitative way, a more advance data gathering and analysis methods will have to be applied. Such approach is rather used on later stage of the initiative development. Examples of result and effect indicators used to evaluate progress of cluster initiatives may include:

- Level of employment in the member companies and related companies;
- Total turnover in the member companies and related companies;
- Profit in member companies and related companies;
- Productivity and value creation;
- Share of turnover on regional, national and international markets;
- Number of companies belonging to a national or international group;
- Number of companies that have introduced products (goods or services) that are new or considerably improved to the market during the last 3 years;
- Number of companies that have introduced new or significantly improved processes over the last 3 years;
- Number of companies that have introduced organisational changes over the last 3 years;
- Number of companies that have introduced market innovations over the last 3 years.

As clearly seen, most of the questions will require precise econometric models and is applied with a reasonably large effort for data collection and analysis. Due to this fact more detailed networks evaluation is not implemented often.

3.3 Upgrading agreements



Following successful cooperation managed on the basis of action plans agreed during meetings and workshops, cooperating partners might consider upgrading their relations to a higher level – formalised strategic agreement.

The cooperation agreement defines the respective rights and obligations of the partners within the initiative. Strategic agreement creates basis and framework for long term collaboration.

Proposed agreement regulates all aspects of the cooperation and may include such issues as participation fees, intellectual property issues, questions of liability and responsibility of partners.

A detailed description of the rights and obligations of the stakeholders creates fundament for all future projects agreed in the partnership.

The box below displays a possible content of the strategic agreement between partners in the initiative based on the content of the agreement from Human Technology Styria GMBH[5]. An example of a full strategic agreement can be found in Annex to these guidelines.

Documentation - Agreement strategic collaboration

I. Preamble
II. Cooperation
- A. Cooperation
- B. Cluster Services

III. Cooperation Fee
- A. Fee amount
- B. Due date
- C. Default in payment

IV. Information on Company
- A. Information obligation
- B. Control rights
- C. Disclosure statement

V. Contract term
- A. Indefinite
- B. Regular contract termination
- C. Extraordinary contract termination
- D. Legal relationships on termination of contract

VI. Cluster Trademark
- A. Right of use and commercialization
- B. Use of trademark
- C. Use of trademark after expiry/termination of contract

VII. Liability
- A. Liability for success, guarantee, damages
- B. Disclaimer of Liability

VIII. Data safety and protection
- A. Data processing
- B. Consent
- C. Protection of access data
- D. Use of data

IX. Applicable law, contract language
X. Mediation Clause
- A. Mediation obligation
- B. Mediator
- C. Arbitration proceedings

XI. Arbitration Proceedings
XII. Court of Jurisdiction
XIII. Other Provisions
- A. Amendments
- B. Severability clause

[55] GTZ "Cluster Management – A Practical Guide"

Chapter 4. Wrap up

The above guidelines were to present possible ways for benchmarking and acquiring new members and developing initiating activities in the network.

The entire concept is built upon the framework developed in the Stardust project, presented and agreed by project partners and described in Activity 6.3: "Design and piloting of instruments for building strategic linkages".

As mentioned in the introduction the aim of this activity is to develop methods for building strategic linkages between clusters, innovation milieus or innovation networks in the BSR as well as linking new partners to existing consortia. These guidelines delivered supporting information for implementation of three subsequent phases: (1) Partner search; (2) First meetings; (3) First phase of collaboration. This activity is linked to other work packages, particularly connected with Activity 6.2 – Knowledge sharing process and is supposed to be tested in the five pilot projects.

Summary of the approach described in this document is presented in the table below.

Table 6: Design and piloting of instruments for building strategic linkages- summary of the approach

	Activities	**Partner status**	Tools/services
Building strategic linkages Phase I: Partner search			
	Defining scope and needs B2B /C2C/C2B	1. list of interesting candidates	Web, Personal contacts
	Identifying services for partner search	2. list of interesting candidates	ECCP, EEN, E-match, TCI, ECA, B2match, matchmaking events, matchmaking agencies
	Communicating and exploring profiles	Short list of possible partners	
Building strategic linkages Phase II: First meetings			
	The first meeting Preparations>Meeting>Joint conclusions	Preferred candidates / no match	Facilitating and Advisory services
	Evaluating candidates> Follow-up dialogue with selected candidates	Selected candidates	Advisory services
	Intentional agreements2.-3. meeting	Selected candidates	IPR/Contract guidelines
Building strategic linkages Phase III: First phase of collaboration			
	Implementing activities Action plan> Actions	Partnership agreement	Knowledge sharing tools
	Evaluating outcomes > Adjusting ambitions	Partnership agreement/Exit	
	Upgrading agreements	Agreement strategic collaboration	IPR/Contract guidelines; Knowledge sharing and creation tools
Source: Innovation Norway			

Annex – Strategic cooperation agreement

There might be different forms of formalising cooperation that network of clusters might choose.

Association agreement

Art. 1 Name and seat of the association

01. The name of the association is abbreviated as.

02. The seat of the association is .

03. The association is active nationally and internationally.

Art. 2 Objectives of the association

- *Joint marketing*
- *Developing new markets and sales potential (export promotion)*
- *Developing and providing needs-oriented services to members*
- *Organising training and advanced training events for members and their employees*
- *Creating a forum for promoting formal and informal communication and mutual exchange of information*
- *Addressing issues which are in the interests of members*
- *Representing the interests of the members in dealings with the government and other public institutions (lobbying)*
- *Promoting strategic alliances between businesses*
- *Promoting and supporting joint projects by members*
- *Publishing information materials of all kinds*
- *Improving cooperation between member businesses and the universities*
- *Promoting innovations and new technologies*

Art. 3 Funds for achieving the association's objectives

Provided example constitutes an association between partners, implemented in reality by Croatian IT-CLUSTER GRIT.

The funds required to achieve the association's objectives are raised by

A. Membership fees, the amount of which is set by the membership meeting;

B. Gifts, donations, support funds, subsidies and other transfers, provided they are not subject to conditions contrary to the association's object;

Art. 4 Association members

01. The members of the association are regular members and honorary members.

02. Regular members may be:

a) Companies
b) Public bodies
c) Associations and other communities of interest
d)Research and education institutions

03. Honorary members are individuals or legal entities who have done special service for the association or its objectives.

04. The acceptance and exclusion

- *Of regular members is a matter for the membership meeting, based on a written membership application and supporting documentation of compliance with the acceptance conditions in art. 4 para. 2,*
- *Of honorary members is a matter for the membership meeting based on a recommendation by the executive board.*

Art. 5 Rights and duties of members

01.a Regular members possess active and passive voting rights.

01.b Regular members have the right to participate in and vote at membership meetings or to send a delegate endowed with a written certificate of authority.

01.c Each member has one vote in the membership meeting.

02. Honorary members are entitled to attend membership meetings without the right to vote, but with the right to be heard.

03. All members are entitled to participate in the association's events and to receive the reports of the executive board during membership meetings on the activities of the association and its financial situation.

04. Members are authorized to use the logo of for their publications using the form: Company XYZ, member of the .

07. Members are required to do their utmost to promote the interests of the and to refrain from any activities that could harm the reputation and the objectives of the . They are obliged to respect the articles and the decisions of the organs, as well as to pay on time their admission and membership fees to the amount as determined by the membership assembly.

Art. 6 Ending membership

01. Membership lapses:

- On death (for a legal entity on loss of legal personality);
- On voluntary resignation;
- On cancellation;
- On exclusion.

02. Voluntary resignation must be notified in writing to the executive board with three months' notice to the end of a calendar year.

03. The executive board may cancel a membership if the member is more than three months in arrears with its membership fee despite two reminders; cancellation does not affect liability for membership fees due.

04. The executive board may exclude a member from the association for gross violation of membership duties or dishonest conduct. Exclusion may be appealed to an extraordinary membership meeting within two weeks of receipt of the written exclusion resolution; the meeting has the final decision within the association. All membership rights and duties are suspended pending the decision of the membership meeting.

Art. 7 Membership fees

01. The amount of the annual membership fee depends on the type of member and membership.

02. The amount of the annual membership fee is decided by the ordinary membership meeting; the executive board has the right to make a prior recommendation which takes into account the association's financial situation and future planned projects.

Art. 8 Association organs

The organs of the association are:

01. The membership meeting (arts. 9 – 10)
02. The executive board (arts. 11 – 12)
03. The general secretary (art. 13)
04. The auditor (art. 14)
05. The arbitration tribunal (art. 15)
06. Working groups (art. 16).

Art. 9 Membership meeting

01. The ordinary membership meeting is held within two months of the beginning of each calendar year.

02. An extraordinary membership meeting must be called a) by resolution by the executive board, b) by resolution of the ordinary general meeting, c) on written application of at least 25% of the regular members, or d) on request by the auditor, in which case the extraordinary membership meeting must be convened by the executive board and held within at most three weeks after receipt of the application.

03. a) The executive board must invite all members in writing to both regular and extraordinary membership meetings with at least 14 days' notice before the date of the meeting.

03. b) Notice of a membership meeting must include the agenda.

04. Motions on items on the agenda must be submitted to the executive board in writing at least seven days before the date of the membership meeting.

05. Valid resolutions – except for those on an application to convene an extraordinary membership meeting – can only be adopted on items on the agenda.

06. The membership meeting is chaired by the president, or in the event of his or her unavailability by the deputy, or in the event of the deputy's unavailability by the oldest member (age) of the executive board.

07. The membership meeting has a quorum if at least one half of the regular members are present at the date and time fixed. If less than half of the regular members are present the meeting will start after a delay of 30 minutes and then has a quorum regardless of the number of people present.

08. Resolutions of the membership meeting are adopted by simple majority of the votes cast.

09. Resolutions on amendments to the articles or the dissolution of the association require a majority of three fourths of the votes cast.

10. The decisions and resolutions taken by the membership meeting must be recorded in the protocol of the membership meeting by the secretary. They are to be signed by the president of the executive board and the secretary.

11. The minutes of the membership meetings must be posted within two weeks on the intranet and made accessible to all members.

Art. 10 Rights and duties of the membership meeting

Regular members vote on:
a) Resolutions to accept new members,
b) Resolutions on the articles and any amendments,
c) The appointment and removal of members of the executive board,
d) Resolutions on motions by the executive board and members,
e) The appointment and removal of the auditor,
f) Resolutions approving the acts of the executive board,
g) Resolutions on the voluntary dissolution of the association,
h) Resolutions on adopting the minutes of the membership meeting,
i) Decisions on appeals against exclusions of members according to art. 6 para. 4.
j) Resolutions on the executive board's standing orders,
k) Resolutions on the annual estimate for income and expenditure and the financial statements,
l) Setting the amount of the annual membership fee.

Art. 11 Executive board

01. The executive board has at least 5 members

a) The president,
b) The secretary,
c) The treasurer,
d) The deputies of (a), (b) and (c), if elected by the membership meeting,
e) Other members,
f) Associate members (without voting rights) and
g) The general secretary (with voting rights), if one is appointed.

02. The executive board holds office for two years. In any event, the executive board holds office until a new executive board is elected. Former board members may stand again for election.

03. The executive board has the right in the event of the resignation of an elected board member or if other board positions are vacant for any reason to appoint one or more members eligible for election.

04. Meetings of the executive board are convened orally or in writing with 14 days' notice by the president or his or her deputy or in the event of their incapacity by the oldest (by age) board member.

05. The executive board has a quorum if all its members have been invited and at least half of them are present.

06. Decisions of the executive board are adopted by a simple majority. In the case of an equality of votes for and against the vote of the president is decisive.

07. The meetings are chaired by the president or in the event of their incapacity by their deputy and in the event of the deputy's incapacity by the oldest (age) board member present.

08. a) A board member's office ends

- *In case of death*
- *At the end of their term of office*
- *With suspension*
- *With resignation*
- *In case of withdrawal from the of the institution which he or she represents*
- *In case of change of the employer to one that is not a member of the .*

08. b) In the case of a change of the employer the functions of the board member are offered to the board which then decides how to proceed.

08. c) The membership meeting may at any time suspend the entire executive board or just individual members. For the suspension of the founding members of the executive board, however, important reasons need to be specified.

08. d) The members of the executive board can resign at any time in writing. Notice of resignation must be sent to the executive board, or in the event of the resignation of the entire executive board to the membership meeting. The resignation of the entire executive board only takes effect on the election of the new executive board.

Art. 12 Rights and duties of the executive board

01. The executive board is responsible for managing the association; it has all the tasks which are not reserved by these articles for another association organ, specifically:

a) Drawing up the annual estimate of income and expenditure, the annual report and the financial statements;
b) Preparing and convening ordinary and extraordinary membership meetings;
c) Administering the assets of the association;
d) Accepting, excluding and cancelling association members;
e) Hiring and dismissing employees of the association or a general secretary.

02. The president or his deputy or in case of their unavailability the general secretary represents the to the public. The executive board can also assign some or all current proceedings to the general secretary.

03. The following provisions govern internal dealings:

a) The president or his deputy preside the membership meetings and executive board meetings. In case of urgent situations he or she is authorized to decide on his own authority in matters under the responsibility of the membership meeting or the executive board. However he needs to obtain ex post approval by the responsible organ.

b) The secretary supports the president with the management of current proceedings. He is responsible for the minutes of the membership meetings and executive board meetings.

c) The treasurer is responsible for proper management of the association's funds.

d) Except for responsibilities assigned to them, the secretary's or treasurer's deputy may only act if the president, his deputy, the secretary and the treasurer are unavailable; this does not affect the validity of deputies' external dealings.

04. The executive board draws up its own standing orders which must be submitted to the membership meeting for approval.

05. The executive board proposes the agenda for membership meetings. Topics not on the agenda, which has been enclosed with the invitation, can only be discussed if a written request has been sent 3 days in advance of the meeting to the executive board.

06. The executive board may delegate specific tasks to individual members or experts.

Art. 13 General secretary

01. The general secretary is appointed and dismissed by the executive board. He is subordinate to the executive board. For the appointment and dismissal of the general secretary a two-thirds majority is necessary.

02. To the extent of the authority conferred by the executive board, the general secretary manages the current proceedings of the association and is authorised to sign within the scope of that authority.

03. If no general secretary is appointed, the tasks of management are performed by the executive board.

Art. 14 Auditor

01. The regular members in the membership meeting appoint an auditor and a deputy auditor for a two year term of office; re-election is permitted.

02. The auditor reviews the form and substance of the association's financial management and reports on it to the membership meeting.

Art. 15 Arbitration tribunal

01. All disputes arising out of issues of membership of the association are decided by the arbitration tribunal.

02. The arbitration tribunal consists of 3 members: each of the disputing parties names one of the members, who together decide on the chair of the tribunal.

03. Decisions of the arbitration tribunal are found by simple majority and are final within the association.

Art. 16 Working groups

01. Working groups may be set up to carry out specific activities and projects and for specific technical tasks.

02. Working groups are made up ofmembers who undertake to devote certain resources to a joint working goal.

03. Working groups are set up by resolution of the executive board.

04. Members of working groups must bemembers.

05. Members of the respective working groups choose a head with a single majority vote, who reports to the executive board. The position of the head of a working group can also be filled by an executive board member.

Art. 17 Association year

In the year of the foundation the accounting year starts with the entry in the association register and ends at the 31st of December of the same year. In the following years the accounting year begins at the 1st of January and ends at the 31st of December of each year.

Art. 18 Association assets in the event of dissolution

In the event of dissolution of the non-profit association or the disappearance of its objectives (art. 2) the association's assets are to be dedicated to any non-profit legal successor or otherwise solely for non-profit purposes.

Location and Date

Signatures of the founding members

About the contributor:

Oxford Research was established in 1995 and is part of the Oxford Group. We are a full service, specialist and dynamic research company offering research services in industrial, regional development and welfare. Within these areas the company deals with innovation systems, the development of municipalities, regions, as well as social, educational and labour market policies. Oxford Research also carries out evaluations and analyses. In the research we combine academic depth, excellence in communication and strategic understanding. Oxford Research has branches in Denmark, Norway and Sweden.

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BSR Stars links universities, clusters and innovative companies in the Baltic Sea region through projects and new opportunities for financing transnational cooperation. BSR Stars speeds up innovation using transnational cooperation to create strengthened competitiveness and sustainable growth.

StarDust consists of five sub-projects supported by new tools and methods on open and user-driven innovation. StarDust combines strengths and core competencies in nine countries in Northern Europe and brings business, academic and public worlds together.

During 2012 and 2013 StarDust has strengthened its partnership by attracting new partners and financiers: the partners received more than 8 MEUR as add-on investment, 15 research institutions and six new cluster and business development organisations joined as associated partners. The five sub-projects are continuing their work by preparing strategic action plans focusing on long term strategy.

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