Clusters Competency Maps

ACTION
European Cluster Excellence Programme

PROJECT
Regrouping European Clusters in a Partnership of Excellence for Mobility

RECIPE4MOBILITY

CLUSTERS COMPETENCY MAPS

GRANT AGREEMENT NUMBER:
874385

PROJECT COORDINATOR:
Mathilde PETIT
Head of International Affairs, Mov'eo

Clusters competency maps
D2.1

ESCP4X
RECiPE4Mobility
Partnership

Co-funded by the COSME programme of the European Union

RECIPE MOBILITY

Document Information

IST Project Number	874385	Acronym	RECiPE4Mobility
Full Title	Regrouping European Clusters in a Partnership of Excellence for Mobility		
Project URL	https://recipe4mobility.eu/		

Deliverable	Number	D2.1	Title	Clusters competency maps
Work Package	Number	WP2	Title	Development of cluster management skills, cluster strategy and learning

Date of Delivery	Contractual	02/10/2020	Actual	02/10/2020
Status	version		final	
Nature	report ■ demonstrator □ other □			
Dissemination level	public □ restricted ■			

Authors (Partner)	Mov'eo			
Responsible Author	Name	Mathilde Petit	E-mail	mathilde.petit@pole-moveo.org
	Partner	Mov'eo	Phone	
Contributors	All Partners			
Reviewers	All Partners			

Abstract (for dissemination)	The competency maps of RECiPE4Mobility Partners estimate clusters' own resources and key performers from our ecosystems to meet what we have identified as needs of our members.
Keywords	Cluster analysis, services, network, partners, business model, SMEs

Version Log			
Issue Date	Rev. No.	Author	Change
25/09/2020		Mov'eo	
Document History			
Version	Date	Main Modification	Entity
Draft 1	18.09.2020	Individual competency maps drafted	All
Draft 2	25.09.2020	Compilation of the competency maps	Mov'eo
Final version	02.10.2020	Final version	Mov'eo

Abstract

The first months of the RECiPE4Mobility project gave us a very broad and objective view of the services offered by our clusters, thanks to peer-learning activities, consultations with our members, and benchmarking/discussions with the ESCA Secretariat. It was then time to wonder: What are our current resources to meet these needs of our members? That is the core objective of the 5 clusters competency that we put forward today. We estimated clusters' own resources and key performers from our ecosystem to meet what we identified as needs of our members. That was the final piece of analysis we needed to launch the development of comprehensive strategies and implementation roadmaps both at clusters and partnership levels.

This report is part of a project that has received funding by the European Union's COSME Programme under grant agreement number 874385.

Executive Summary

The overarching objective of RECiPE4Mobility is to enhance cluster management skills towards the generation of added-value support services for SMEs. RECiPE4Mobility clusters are utterly convinced this will be best achieved through cross-border and cross-sectoral collaboration, and that is why we will **develop comprehensive strategies and implementation roadmaps both at clusters and partnership levels.**

But before working on the future of our strategies, we had to analyse the present, and therefore **identify strategic areas for skills improvement in our individual clusters.**
To do this, we first opened ourselves up to external points of view, both at the level of our ecosystems and between EU partners, which is the essence of the project:
- We exchanged no less than 17 good practices on our innovation, business, network and skills services, which led to a first publication.
-We carried out 25 consultations with our members about their satisfaction in the current services and their thoughts on potential new services.
-We have started discussions on our areas for improvement with the European Secretariat for Cluster Analysis (ESCA), and Mobinov and RAI Automotive Industry NL have already obtained a Bronze Label.

All this feedback has given us a **very broad and objective view of the services offered** by our clusters. Now that we had clearly identified strategic areas for skills improvement (summarized in this document), it was then time to wonder: **What are our current resources to meet these needs of our members ? That is the core objective of the 5 clusters competency that we put forward today. We estimated clusters' own resources and key performers from our ecosystem.**

Each cluster has indeed undertaken **a SWOT analysis on three topics**, to identify its **strengths** and **weaknesses**, but also the **opportunities and threats in its environment**:

- Topic 1: Cluster's business model and internal management
- Topic 2: Cluster's services and ability to attract/retain members
- Topic 3: Cluster in its environment - funders, partners, network

In addition, we went further by drafting a **TOWS analysis for each of these topics**, to match up the Strengths with Opportunities and the Threats with Weaknesses. Therefore, we identified **first actions to reduce threats, take advantage of opportunities, exploit strengths and remove weaknesses**.

We are glad to deliver such a comprehensive document on our clusters. That was the final piece of analysis we needed to launch the development of comprehensive strategies and implementation roadmaps both at clusters and partnership levels. The first step of this work will indeed be to share these Competency Maps among our clusters, so that we can specifically identify how we can cooperate to improve as clusters and deliver ever more added-value services to our members, and SMEs in the first place.

Table of contents

E-Mobility Cluster competency map

Step 1: Areas for skills improvement identified during peer-learning, ESCA benchmarking and consultations

The E-Mobility Cluster Regensburg is a network for companies, specialists, students, sponsors, research institutions, universities and interested parties whose focus is on the increasing importance of the future topic electromobility. Through extensive networking and cooperation, as well as with the initiation and promotion of research projects, the cluster aims to shape the future of electromobility in a sustainable way.

The cluster is aiming for the ESCA Bronze Label. For the E-Mobility cluster, however, it is very valuable to be listed in the German cluster initiative goCluster in the first step and to make the ESCA Bronze Label in the next step. The "go-cluster" program is the cluster-related excellence measure of the Federal Ministry of Economics and Energy. The objectives of the program are to provide impulses for the further quality improvement of cluster management organizations towards international cluster excellence, to increase the international visibility of German cluster initiatives and to support the Federal Ministry of Economics and Energy in the design of cluster policy and the implementation of cluster policy activities at federal and EU level. In addition, the Cluster Platform Germany, the joint information portal of the BMWi and BMBF, will be implemented. The VDI/VDE-IT is responsible for the management and implementation of the entire programme.

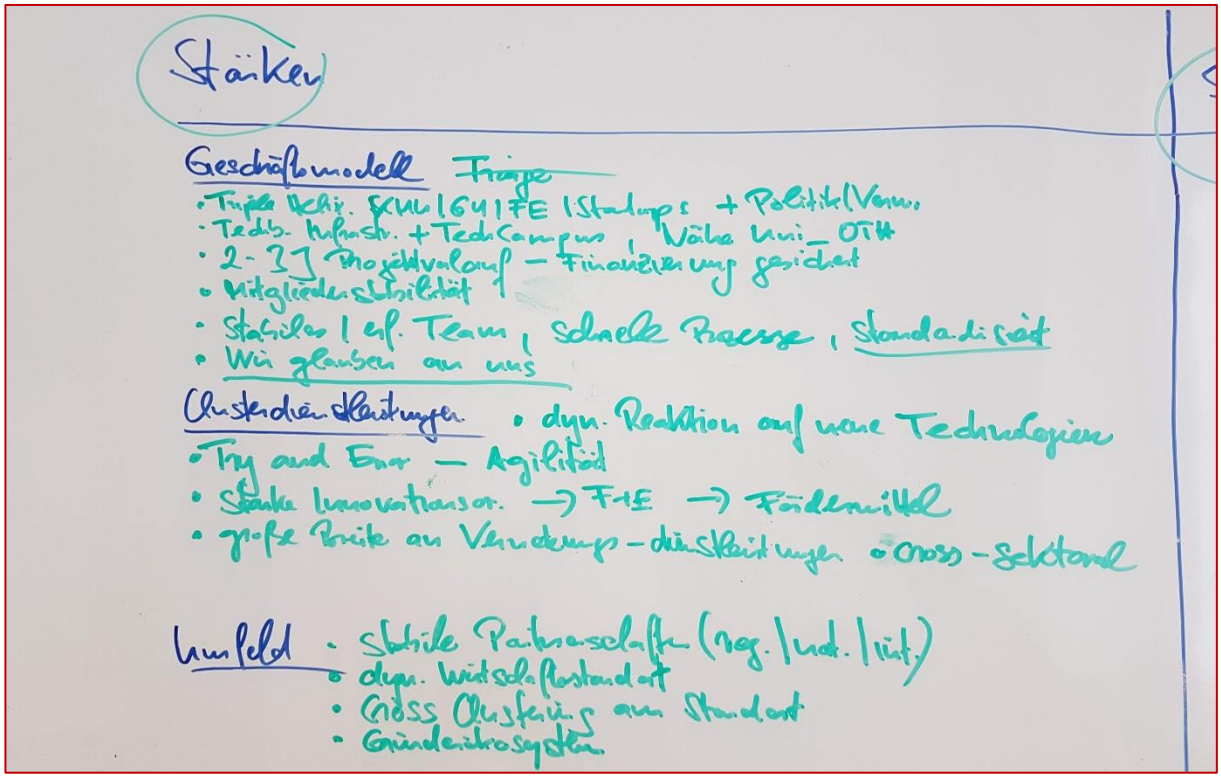
The Cluster applied in the second semester of 2020 to GoCluster. This way the Cluster will be supported financially to go through the benchmarking process, and will also appear in the German Clusterlandscape go-cluster.

By the exchange from the sharing of best practices from other clusters, we learned that we have a lack of knowledge in European funding schemes, e.g. Horizon 2020 or the follower program Horizon Europe. Therefore, we suggested to organize a training session related to this topic within the RECiPE4Mobility project. We have also seen that our level of service for members is comparable with other consortia partners. Nevertheless our clusterservice Innovation platform for members to try out innovative projects in practical operation is outstanding and unique, also the cluster realized the next innovation lab with two small autonomous people mover starting in 2021.

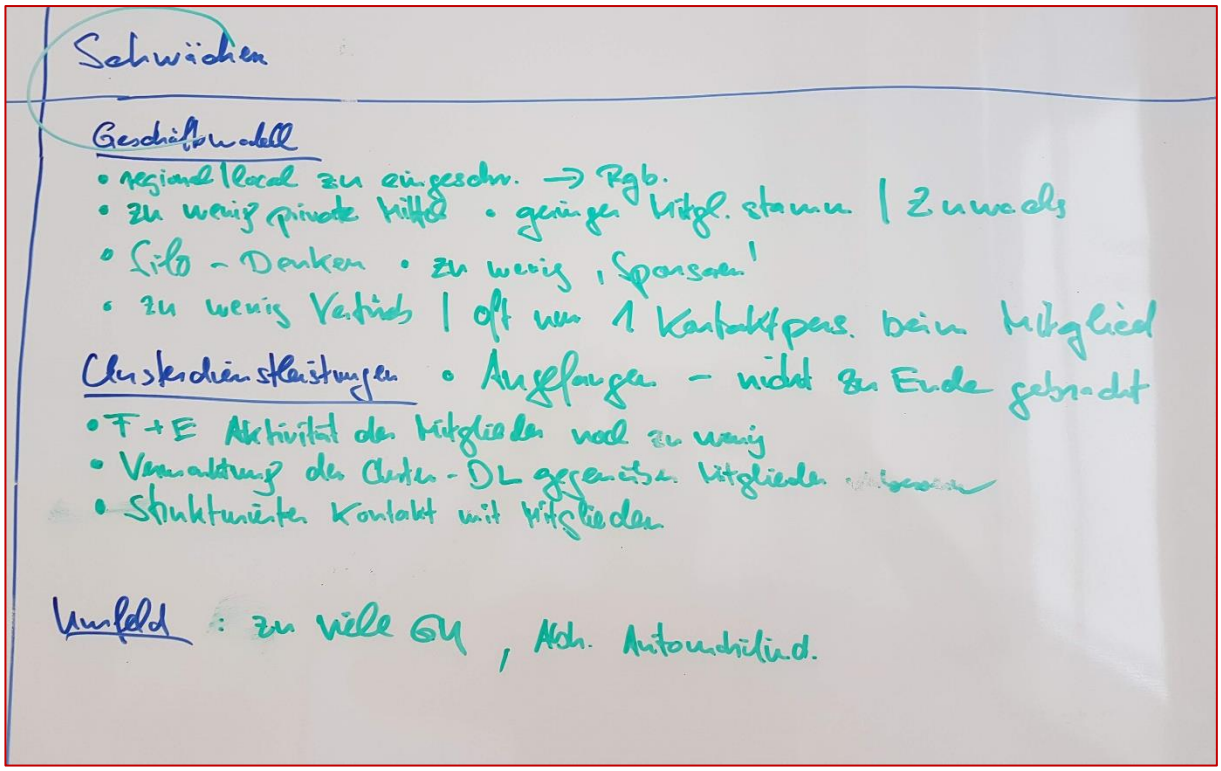
Conducting the SWOT-analysis and making the first action plan with a TOWS analysis, it´s clearer now that the E-Mobility cluster main goal is to be a European Top cluster in several years. By this it is necessary to focus on a broader value chain. This will be achieved with a consolidation of the E-Mobility Cluster and the Cluster IT-Logistics.

Step 2: SWOT analysis on cluster's own resources

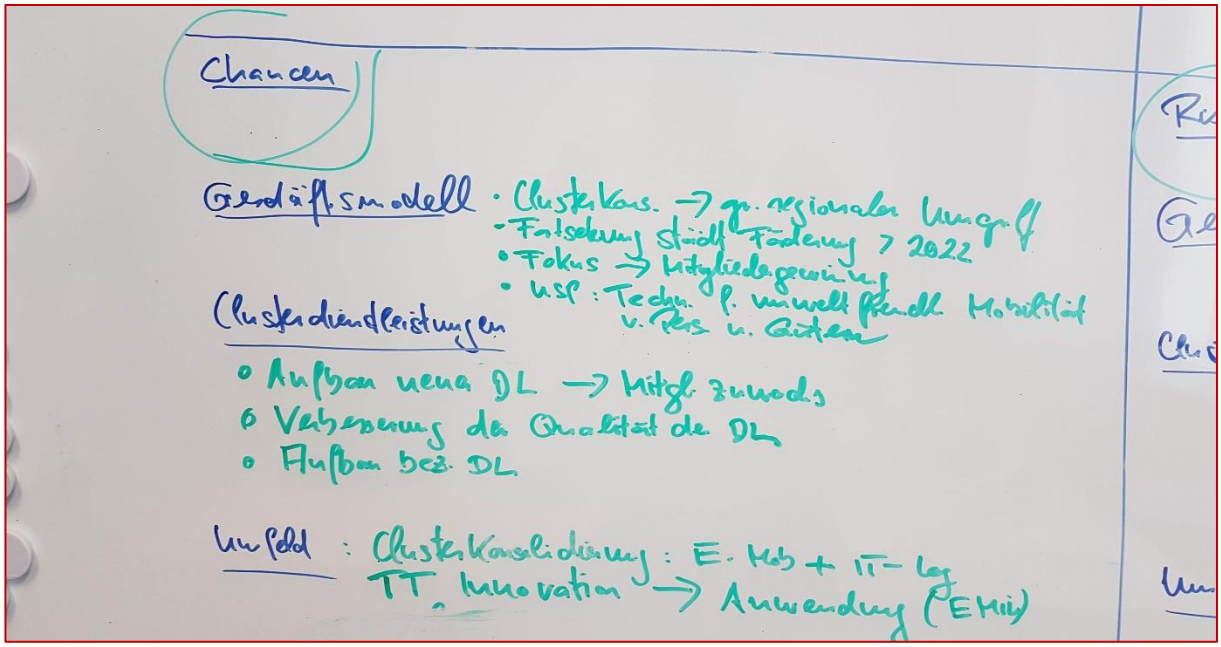
Strengths



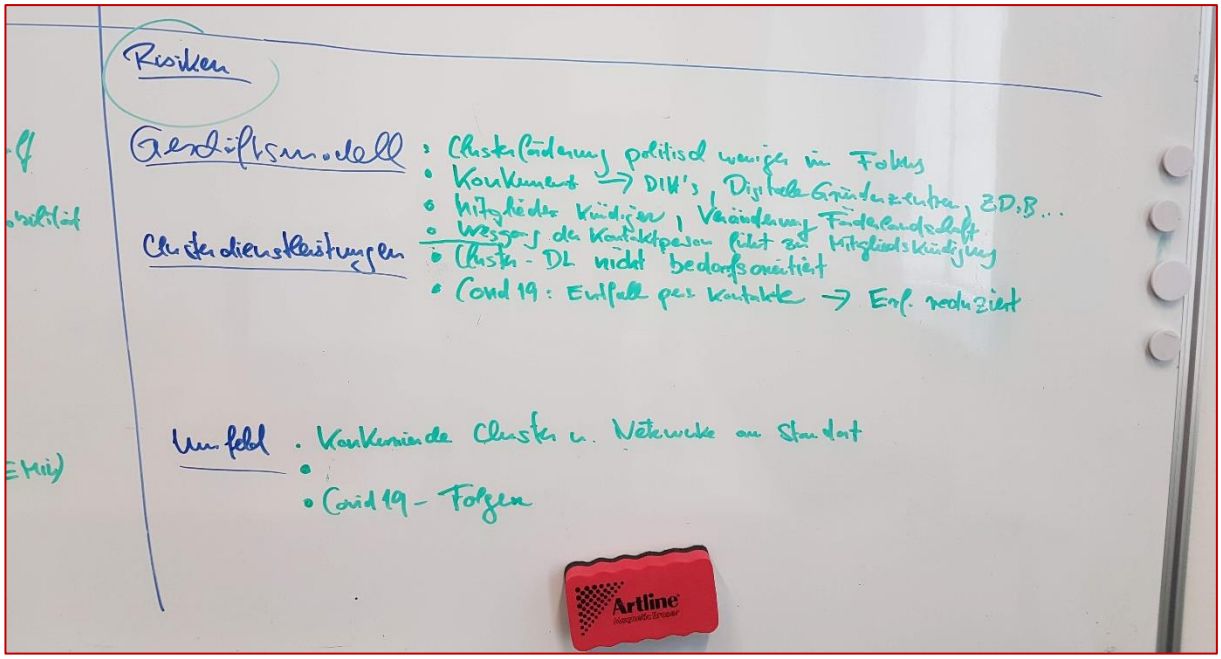
Weaknesses



Opportunities



Threats



Strengths	Weaknesses
Cluster's business model and internal management • Triple Helix focused • Involvement of SMEs, large enterprises, Politics and administration • Existing infrastructure for founders 10.000 square meters in the start-up center TechBase • Physical proximity to the university and university of applied sciences • Physical proximity to the TechCampus Regensburg • Solid number of cluster members • Experienced cluster team: innovation and process focused • Budget secured through projects for 2-3 years • **We believe that we are among the TOP 10 clusters in Germany. We orientate ourselves to top European clusters.** **Cluster's services and ability to attract/retain members** • Fast, dynamic response to members requirements • Test of new cluster services "Try and Error" • Focus on innovations: 30 mio. funding for cluster members and cluster projects generated since 2011 • Wide range of opportunities for networking and exchanging experiences • Cross sectoral collaborations, e.g. with the IT-Logistics cluster • Linking innovation + application in real laboratories **Cluster in its environment: funders, partners, network** • Solid partnerships (regional, national, international) • Regensburg is a dynamic business location: placed among the TOP10 locations in Germany in terms of economic dynamism • Distinctive cross cluster structures at the location (IT-Logistics cluster, IT-security cluster, sensor technology cluster, artificial intelligence cluster, culture and creative industries cluster) • Regensburg has the most active start-up scene in Bavaria besides München	**Cluster's business model and internal management** • We are regionally too restricted • We are perceived as Regensburg-Cluster • Too little private funding • Too high proportion of project-related funding • Insufficient sponsors • Insufficient Memberships • Silo-Thinking • Sales processes are not structured enough • Often only one contact per Member **Cluster's services and ability to attract/retain members** • Services such as new working groups are not implemented permanently -> projects fall asleep • The members´ R&D activities are too low • The marketing of the cluster services towards the members is too weak • We have intensive contact with almost all members, but the process for this is not structured. **Cluster in its environment: funders, partners, network** • High proportion of large enterprises, insufficient SMEs • Too much dependence on the automotive industry

Opportunities	Threats
Cluster's business model and internal management • The planned cluster consolidation (E-Mobility Cluster + IT-Logistics Cluster) enables greater regional coverage • Possibility to continue funding the cluster from 2022 onwards • Growth in members. Goal: 200 members in 2025 • USP- unique selling point of the Cluster: Technologies for environmentally friendly mobility of people and goods **Cluster's services and ability to attract/retain members** • Build up new services to retain and attract members • Improving quality of the services **Cluster in its environment: funders, partners, network** • Cluster consolidation is the unique opportunity to establish a top European cluster in Regensburg • Technology transfer: innovation > application (real laboratories)	**Cluster's business model and internal management** • Funding of clusters uncertain in the future • Competing business support organizations, e.g. Digital Innovation Hubs • Termination of Memberships • Leaving contact persons of members can lead to the termination of memberships • Change in the funding landscape for technology projects • Slowing down internal processes **Cluster's services and ability to attract/retain members** • Cluster services may no longer be dependent on requirements • We invest too much time in processing topics with insufficient contribution margin • COVID-19: Elimination of personal contacts and reduction of the personal exchange of experiences in the cluster **Cluster in its environment: funders, partners, network** • Competing clusters and networks on site • Consequences of COVID-19

Step 3: First action plan with TOWS Analysis

Topic: Business model and internal management	**Opportunities**	**Threats**
Strengths	S-O Strategy: building on the cluster's strengths to take advantage of environment opportunities • Consolidation of the E-Mobility and IT-Logistics clusters creates a unique USP	S-T Strategy: building on the strengths of the cluster to limit the impact of environment threats • Buildup better communication structures with members, e.g. annual meetings and at least two qualified contacts per member
Weaknesses	W-O Strategy: ensure that the cluster's weaknesses will not prevent it from taking advantage of the environment's opportunities • Improvement of internal sales processes. Thereby we can win more members or sponsors	W-T Strategy: : ensure that weaknesses in the activity will not increase the impact of environment threats • We want to become a leading European cluster because clusters that are too small and regional will no longer be able to survive
Topic: Cluster's services and ability to attract/retain members	**Opportunities**	**Threats**
Strengths	S-O Strategy: building on the cluster's strengths to take advantage of environment opportunities • Testing of new formats and cluster services • Quick assessment of whether members appreciate these offers • Service-Pop-up	S-T Strategy: building on the strengths of the cluster to limit the impact of environment threats • Prepare strategically for the new cluster funding period > 2022 • Success Stories – better merchandise project successes from the cluster, e.g. in social media channels, website

Weaknesses	W-O Strategy: ensure that the cluster's weaknesses will not prevent it from taking advantage of the environment's opportunities • Better merchandise of our services towards the members	W-T Strategy: : ensure that weaknesses in the activity will not increase the impact of environment threats • Self-evaluation: which cluster services do we provide, which are valued by the members, which services provide a positive contribution margin, which a negative contribution margin
Topic: Cluster in its environment : funders, partners, network	**Opportunities**	**Threats**
Strengths	S-O Strategy: building on the cluster's strengths to take advantage of environment opportunities • The current economic crisis will mean that the existence of clusters will be threatened • How can we use our strengths (2-3 years project forerun and financial security) to benefit from the weaknesses of other competing clusters? • How can we position ourselves as a cluster in the context of sustainable and innovative mobility in the long term?	S-T Strategy: building on the strengths of the cluster to limit the impact of environment threats • Initiation of new topics and working groups in order to retain existing members and attract new ones • Development of new Innovation-Networks, e.g. Hydrogen for mobility and AI
Weaknesses	W-O Strategy: ensure that the cluster's weaknesses will not prevent it from taking advantage of the environment's opportunities • Reduction of the dependence on the automotive industry through cluster consolidation and extension of the value chain • Attract more SMEs as cluster members	W-T Strategy: ensure that weaknesses in the activity will not increase the impact of environment threats • We have to grow due to the competition between several clusters in Regensburg • More members • Better visibility through uniqueness, e.g. ESCA Gold Label as the only Gold Label cluster in Bavaria

Mobinov competency map

MOBINOV :: Automotive Cluster
PORTUGAL

Step 1: Areas for skills improvement identified during peer-learning, ESCA benchmarking and consultations

The Mobinov Cluster promotes the convergence of various players in the national automotive industry, including global manufacturers and suppliers present in Portugal, national suppliers, associations and knowledge centers and universities, around an ambitious action plan and structured in programs aimed at the development of this industry.

The aim is to promote the growth of the national automotive sector through initiatives and mobilizing projects that strengthen international competitiveness through: innovation, increased added value, increased national incorporation and increased exports of components and complete vehicles through increased cooperation and coordination between enterprises, associations, public administration bodies and entities of SI&I.

For the Mobinov cluster, the ESCA Benchmarking was very important and enriching for the future. We were able to perceive in a different way our strengths and weaknesses and how we work. ESCA recommends us to implement some actions to improve the Cluster Management Organisation's performance towards excellence. Regarding collaborative projects, we are already working on a digital innovation hub to improve this area. Secondly, on media impact, we still need to be recognized by the media in Portugal, so we are working with a company to have more visibility and have already achieved results having Mobinov appeared in newspapers, radio and television. The last point of improvement is on the development of entrepreneurship, and Mobinov is indeed keen to create and implement changes, innovations and improvements in the automotive industry market.

Develop the SWOT analysis and draft our action plan with a TOWS analysis, it has become clear what needs to be done towards promoting the Portuguese automotive cluster and the best practices that need to be set in motion to achieve the main goal of becoming an European Top cluster.

Step 2: SWOT analysis on cluster's own resources

Strengths	Weaknesses
Cluster's business model and internal management HR • Implementation of AGILE management method • Collaborative spirit and commitment within the team • Internal communication Organization • Widely diversified group of members (SME's, Associations, SCT's entities, universities and training academies). • High involvement of the Board in decision making Financial • Liquid financial stability that allows the Cluster to maintain its activity without third-party funding. **Cluster's services and ability to attract/retain members** • Lead cluster nationwide • Privileged networking for members • Participation in international events (member showcase) • Proximity with members (Events, Projects...) • Proximity with European Clusters **Cluster in its environment: funders, partners, network** • Collaborative work alongside the government for public policies • Strong involvement in the development of COVID-19 related policies • Good at lobbying with funders • Networks (value chain, from research to industry)	**Cluster's business model and internal management** HR • Lack of training and experience on the industry Organization • Costumer Segmentation not well defined • Cluster founded in 2016 • Communication strategy not up to date Financial • Business model still very dependent on funding programs • Very limited revenues • Lack of support from funding partners **Cluster's services and ability to attract/retain members** • Cost-benefit relation is not clear to every organization in the industry. • Low % of members in opposition to the high numbers of organizations of the sector. **Cluster in its environment: funders, partners, network** • Constant malfunctions in working groups

Opportunities	Threats
Cluster's business model and internal management Organization • Rethink the main revenues strategy – implement new/improve the services. • Redefinition of the communication strategy Financial • Public funding for the cluster in the framework of the automotive recovery plan **Cluster's services and ability to attract/retain members** • Increasing collaboration between cluster and members • Increased FDI in the Portuguese automotive sector • Innovation: mobility is going to change (health, decontamination, impact on shared mobility) • Establishing relationships with key financial players - making use of our relationships to go further in the support to companies? • Calls for proposals don't stop, the essence of the cluster is still there • Opportunity for social networks, generate contact, proximity, interaction, content **Cluster in its environment: funders, partners, network** • Strengthening solidarity within the sector • Improved cluster's skills, contribute to the draft of I4.0	**Cluster's business model and internal management** Financial • Cost-benefit relation may be altered for members in crisis • Project budget cuts due to ongoing crisis **Cluster's services and ability to attract/retain members** • Drastic restrictions on travel and participation in events • Impact on certain forms of mobility (e.g. shared) • Due to COVID-19 crisis, costumers are more focused on surviving rather than planning the future (innovative projects) **Cluster in its environment: funders, partners, network** • Lack of support from funders may hinder cluster's activities in the long term

Step 3: First action plan with TOWS

Topic : Business model and internal management	Opportunities	Threats
Strengths	S-O Strategy: building on the cluster's strengths to take advantage of environment opportunities • Increase interaction with members; costumer innovation • Design a more user-friendly communication plan	S-T Strategy: building on the strengths of the cluster to limit the impact of environment threats • Take advantage of the financial stability and develop projects to widen our value propositions
Weaknesses	W-O Strategy: ensure that the cluster's weaknesses will not prevent it from taking advantage of the environment's opportunities • Take advantage of the opening of certain content to "build a business culture" in an individual and collaborative way	W-T Strategy: ensure that weaknesses in the activity will not increase the impact of environment threats • Assess the possibility to readjust the budget with our funders, following the crisis • Thinking about the crisis over the long term and having a plan B for our revenues in the event of a new crisis • Develop a new strategy of recurring cash generation in order to maintain the attractiveness of the cost-benefit relation. • External communication: define objectives in terms of external communication, (re)define the tools used according to the external messages to be disseminated

Topic: Cluster's services and ability to attract/retain members	**Opportunities**	**Threats**
Strengths	S-O Strategy: building on the cluster's strengths to take advantage of environment opportunities • Animation: take advantage of the contact established during the crisis to continue to animate the network. Maintaining a strong link with members with a phoning campaign • Developing EU activities (calls for proposals) • Be on the frontline of major projects (EDIH, Open Innovation), primarily with our members, to retain more FDI and attract new members	S-T Strategy: building on the strengths of the cluster to limit the impact of environment threats • Phoning: maintain this action. Actions to be carried out periodically. Basis of loyalty. • How to animate a network with the new measures? (switching from physical to digital? maintain physical relations with members) • Promote and participate in digital events • Use our proximity with international partners to discuss and develop the impacts on mobility (e.g.shared).
Weaknesses	W-O Strategy: ensure that the cluster's weaknesses will not prevent it from taking advantage of the environment's opportunities • Take advantage of the recovery period to keep in touch with the members. • Identify the digital tools that will allow us to continue tomorrow to animate the ecosystem and make projects emerging • Integrate member's opinion in our business model offering a more suiting value proposition. (costumer innovation). • Develop a marketing strategy directed to the industry, showcasing the benefits of integrating the cluster and the opportunities that come with a membership. Quality processes: making it an asset and a way to stand out in the market. The quality system also gives credibility when used properly.	W-T Strategy: ensure that weaknesses in the activity will not increase the impact of environment threats • Retaining members: the most important private resources remains membership fees • Aid members in short-term financial difficulties providing guidance (services), to reinforce the bonds and aim for long term projects (I.4.0, Open Innovation).

Topic: Cluster in its environment : funders, partners, network	**Opportunities**	**Threats**
Strengths	S-O Strategy: building on the cluster's strengths to take advantage of environment opportunities • Work with the automotive industry (AFIA, ACAP). • Interesting for the branding of the cluster too: position ourselves as the representative of the companies, which is the desire of our members.	S-T Strategy: building on the strengths of the cluster to limit the impact of environment threats • Work closely with the Government in order to be known by companies
Weaknesses	W-O Strategy: ensure that the cluster's weaknesses will not prevent it from taking advantage of the environment's opportunities • Anticipating the “stop and go” phase to help to cope with layoff issues	W-T Strategy: ensure that weaknesses in the activity will not increase the impact of environment threats • Assess the possibility to readjust the budget with our funders, following the crisis

Mov'eo competency map

Step 1: Areas for skills improvement identified during peer-learning, ESCA benchmarking and consultations

Peer-learning

The **peer-learning process** has been very beneficial for Mov'eo, that has just launched a new service offering to meet the objectives set by the French government to clusters from 2019 to 2022. Indeed, Mov'eo has discovered the "Electric Bus EMIL" innovation platform set up by E-Mobility Cluster in Regensburg. The German pole has made available to its members 5 demonstrator buses, on which SMEs and start-ups can test their solutions in real conditions, and promote their solutions to customers and potential users. A very promising service, while Mov'eo aims to derive 10% of its revenue from this type of **demonstration projects** by 2022.

In addition, another service set up by E-Mobility Cluster has drawn the attention of Mov'eo, which must more than ever **identify potential training gaps** in the territory to meet the challenges of mobility of the future. Each year, the German cluster organizes the Jobtech event, which brings together future engineering school graduates and local companies, in order to ensure the latter's competitiveness and avoid that talent leaves in other countries. Mov'eo and all the partners will benefit from a **coaching session dedicated to this service, as it is one of the 6 selected by the consortium**, just like the "Electric Bus EMIL" innovation platform.

Moreover, Mov'eo is always eager to share its experience and skills with European partners, and has been able during this process to underline how the selectivity of its **label for projects** enables the vast majority of the projects labelled by the cluster to be funded. This service has also been selected for the coaching sessions, as long as our **H2020 Transport booklet**, that explains calls for proposals in simplified terms and offers insights and lessons learned, and our **SMEs groups**, that help SMEs to diversify their business model and business portfolio geographically (export) and sectorally (techno push).

Consultations with members

Besides, RECiPE4Mobility Partners are currently planning **training sessions** with external experts, on 3 topics : How to build, market and sell a service offer as a cluster ? How to foster loyalty of members and attract new ones ? What are the EU funding opportunities for our members (Mobility within Horizon Europe, clusters opportunities) ? **These topics meet exactly the needs that our members raised during RECiPE4Mobility consultations.**

Regarding members loyalty, we know our members sometimes feel attached to Mov'eo because the cluster was decisive in the emergence of the company's first projects. Nevertheless, for some of them, it seems necessary to take another look at the services that are the most interesting today in relation to their growth and the diversification of their activity. Some members emphasized the need for personalized appointments to directly determine the services and funding programs that meet their needs. They acknowledge this information overload from different partners can explain their lack of knowledge about the great diversity of actions and themes covered by the cluster. We will have to work on this, especially in time of teleworking.

In addition, we understood our members will need to be made more aware of the cluster's action at European and international level. Some have expressed their interest in participating in European projects, going on international missions and even joining the Clusterxchange pilot project. They are not currently involved in EU projects and missions because of time constraints and lack of knowledge. The cluster will therefore plan some meetings with some of the members interviewed to identify programmes and actions that meet their needs.

Step 2: SWOT analysis on cluster's own resources

Strengths	Weaknesses
Cluster's business model and internal management • Business model: relevant orientations on project-based funding (CPIER, EU projects), diversification thanks to new service offering • Strong cash flow • Management: work in project mode, agility and flexibility (e.g working groups to define a post-COVID-19 strategy and phoning campaign towards members= • Quality system & ISO9001 works, ESCA Gold Label to be renewed **Cluster's services and ability to attract/retain members** • Value chain from idea to industrialization for mobility actors on our 4 innovation drivers (and towards marketing to some extent, as we reduce time-to-market and related costs) • New and clarified tailored service offering, the marketing of some services has already begun • Labelling of projects • Regular and personal relationship with certain members • Book of success stories **Cluster in its environment: funders, partners, network** • Proximity to the industry (e.g. representative in the governance) which recognises Mov'eo as the reference cluster and its representative in the region • Presence in the French Association of Clusters (AFPC) • Strong commitment of the governance • Geographical anchoring in an attractive territory, especially from abroad • Project coordinator in our territories (e.g. Demo ICIM, TEVAC) and EU projects (RECiPE4Mobility, INTonomous)	**Cluster's business model and internal management** • Dependence on public funding and difficulty in achieving public-private funding balance (less than 50% public funding target) and we are still not taking advantage of all the public funding allocated • Private resources still too much linked to membership fees / events / training, which will be the most impacted with the crisis. Difficulty to imply a long-term vision: events in particular should no longer be as important. • Activities only carried out to meet requirements of the public financers, whereas these actions don't meet the cluster's 3 strategic objectives (projects, private resources, membership) • Associative culture and brand image sometimes difficult to reconcile with the sale of services (both internally and towards our members) • Unclear management with the merger: integration of the Regional Associations of the Automotive Industry (ARIA & RAVI) to be finalised and organisation chart to be consolidated, in order to avoid divergent interests in the long term • Change management is tricky, especially with merger (new members) and new branding (implies communication resources) • Low stability of human resources in the Europe division, because of project-based funding **Cluster's services and ability to attract/retain members** • Number of members decreasing • Poor knowledge of certain members, especially with the merger • Poor continued support to companies which have raised funds in their next phases of development (But Mov'eo Business Accelerator could be interesting to propose to a company like Cityscoot…) • Not enough clear communication and marketing to showcase the full extent of the new service offering (not only supporting R&D projects) and our activities on new mobility solutions & services (not only automotive) • Team is to some extent struggling with the logic of selling services

• Wide-reaching ecosystem: all type of stakeholders covering the entire value chain • Cross-sectoral partnerships (e.g. Normandy Automotive & Aeronautics) • Recognition of the cluster at the European level, particularly in comparison with other clusters • Broad European network & interclustering activities • Topics addressed by the cluster in line with the Smart Specialization Strategy of our 2 regions	**Cluster in its environment: funders, partners, network** • Role of clusters in innovation policies weakened. State services/operators are kind of competitors (in particular Bpifrance and its regional branches, whereas they don't have a thematic approach) • Communication not enough aggressive to strengthen our position on our thematics, and lack of recognition of our label • Simply be seen by the Regions as instruments for the promotion of their programmes • Difficulties related to inter-regionality
Opportunities	**Threats**
Cluster's business model and internal management • Investment (through our financial resources) • Project-based funding • Demo-ICIM: provision of a demonstrator allowing members to experiment their solutions in real conditions in a collaborative dynamic • Recovery plan for automotive industry: funding opportunities to seize, implies work with industry representatives (PFA) • New skills in the cluster's team (4.0, trainings) **Cluster's services and ability to attract/retain members** • Take advantage of the merger: extension of the communities of members on the entire value chain: from R&D to industrialisation • Mobilisation around the new brand • Marketing of the new service offering • Support to project proposals is attractive for members, in the context of the recovery plan • International Club: new opportunities for members • New needs on Industry 4.0 • New trends and uses accelerated with the sanitary crisis • Raising members' awareness of the cluster's European activities	**Cluster's business model and internal management** • Dependence on public policies • Downward trend in financial resources could occur when regions become responsible of the cluster's financing • Impact of the economic crisis at least until 2023-2024, especially for industrial SMEs that might stop their membership, while big groups might cut their R&D budget • Budget cuts planned for Horizon Europe • Management: not enough focus on our strategy and the ROI of our actions • Question of the renewal of the permanent team **Cluster's services and ability to attract/retain members** • Competition of consulting firms and chambers of commerce on certain topics • Failure or drop in members' budgets can lead to difficulties in selling the services, especially if the sanitary crisis goes on **Cluster in its environment: funders, partners, network** • New brand: maintain recognition at a national and EU level • Proximity with the industry and cluster seen as a reference, but we need to choose carefully the activities to carry out and evaluate the ROI in terms of financial resources or recognition • Regions are now responsible of the clusters' financing. That can lead to competition between territories, and an increase in the demands of the Normandy Region to carry out more activities on its territory

Cluster in its environment: funders, partners, network • Ecosystem well connected by the cluster, opportunity for members who want to reach other clusters/sectors and access European networks (work already in progress) • Creation of European PPP and Digital Innovation Hubs: opportunities to seize for the cluster • Cross-sectoral partnerships: links with TES (digital innovation cluster) for the Digital Innovation Hubs, pooling of resources could be envisaged (as we do for the correspondent of the French automotive clusters in Brussels)Cross-sectoral partnerships: opportunities with Energy, NTIC, Electronics	• Departure of many members = poorer ecosystem and less attractiveness

Step 3: First action plan with TOWS Analysis

Topic : Business model and internal management	Opportunities	Threats
Strengths	S-O Strategy: building on the cluster's strengths to take advantage of environment opportunities • Explore opportunities offered by our strong cash flow and investment capacity (e.g. regarding calls for proposals, real estate…) • Create assets for the cluster, e.g. the demonstrator Demo ICIM • Continue the work initiated with our working group on the recovery plan: support projects in the framework of the "R&D fund", the "modernisation fund", the "training-skills fund", and inform the network of the opportunities. • Animate the ecosystem in relation with the automotive industry in the context of the recovery plan, and push to be funded for these actions • Build up the team's skills to make us versatile and able to sell the new service offering	S-T Strategy: building on the strengths of the cluster to limit the impact of environment threats • Develop project-based funding • Market the new service offering • Internalise certain hitherto subcontracted activities • Strengthen cooperation within the team through better use of digital tools

Weaknesses	W-O Strategy: ensure that the cluster's weaknesses will not prevent it from taking advantage of the environment's opportunities • Target calls for proposals on which the cluster (and not only its members) can build assets or hire. To a certain extent we must extend our strategy on European calls to national calls, even if the question of private co-financing arises • Ensure sufficient projects (and person-months) to stabilize HR in Europe division • Involve the permanent team and the governance in the implementation of the new brand • Improving everyone's knowledge of each other's skills and tasks	W-T Strategy: ensure that weaknesses in the activity will not increase the impact of environment threats • Search for other sources of funding • Work on the budget to improve break-even point: priority is to maintain HR, so work on fixed costs such as premises • Define a lobbying strategy towards founders to limit our dependence. Regional elections will be important: involve the President and the VPs, use our levers (for example, the President of the Rouen Métropole is the former President of the Regional Council of Haute-Normandie) • Think about alliance/merger strategies for phase V (next phase of funding): possibilities with ARIA Hauts de France / Novalog • Maintain the team's motivation: avoid the team becoming discouraged faced with a crisis that will last several years. Encourage the taking of initiatives.

Topic: Cluster's services and ability to attract/retain members	**Opportunities**	**Threats**
Strengths	S-O Strategy: building on the cluster's strengths to take advantage of environment opportunities • Target contact to market the service offering: 1) Take advantage of trust and knowledge of the needs of certain members to "test" the service offering, 2) Present the full range of the service offering to members who have benefited from one of these services, e.g. start with R&D support and then offering premium services • Take advantage of the rebranding to contact again members and present the new service offering • Change our meeting methodology: let the members talk, and then offer adapted services • Put forward our quality system and the ISO 5001 certification • Work with the French Association of Clusters (AFPC) to adapt services to the Recovery Plan, e.g. to promote the "Innovative Cluster Enterprise" (EIP) label, which provides better visibility for capital investors	S-T Strategy: building on the strengths of the cluster to limit the impact of environment threats • Maintain the contact to avoid decreasing number of members • Underline that collaborative spirit is our signature and our unique selling proposal: to be highlighted in the service offer, e.g. Pack Pavillon ("hunting in a pack" strategy which offers a turnkey presence at the sector's leading trade fairs) • Propose an integrated range of services, to differentiate Mov'eo from consulting firms (e.g. innovation, then business services) • Encourage members to pool financial resources in order to bring out projects. A digital suggestion box could help Mov'eo to better identify these needs and to conciliate them, as is the case in the negotiations on European public-private partnerships • Reward loyalty: 1) e.g. discount at the end of 3 services purchased (relieves members' finances), 2) membership fee offered if sponsoring a new membership, allows leverage effect

Weaknesses	W-O Strategy: ensure that the cluster's weaknesses will not prevent it from taking advantage of the environment's opportunities • Allowing digital access to the new service offering • Segmenting Customer Relationship Management tools to better target our communications and services to members needs • Consider the fact that non-members may be interested in the offer • Adapt communication to the current transition phase, talk about promotion and not marketing of services	W-T Strategy: ensure that weaknesses in the activity will not increase the impact of environment threats • Find the right balance between services included in the membership fees and additional services: lowering the average amount of annual contribution to facilitate access to premium services • Focus on our strategy: lead activities responding to our objectives, monitor the progress of the actions, and select our priorities according to the results • Promote services according to our unique value proposition: Mov'eo as a trusted third-party close to its members • Offer more advanced services to our members, to compensate for the drop in membership, even if the network must remain our main strength • Innovate on events: more digital marketing? partially replace by B2B sessions to get to know our members better?

Topic: Cluster in its environment : funders, partners, network	Opportunities	Threats
Strengths	S-O Strategy: building on the cluster's strengths to take advantage of environment opportunities • Strengthen cross-sectoral activities • Strengthen the sense of belonging: develop clubs on specific topics (Europe, International, Territories, Industry 4.0, etc) • Reinforce the presence in Brussels, e.g by having a mandate from the industry to represent it on the creation of public-private partnerships • Develop a strong partnership / alliance with a European cluster to go beyond exchanges and visits, e.g. a common office in Germany • Consider recruiting a volunteer internationally, to meet our members' desire for internationalisation • Involve governance even more: e.g. offering certain elected officials membership fees or international missions?	S-T Strategy: building on the strengths of the cluster to limit the impact of environment threats • Consolidate our role in the regions, in line with the role played in the recovery plan. This involves working with our governance, lobbying, etc. • Integrate politics in our governance to ensure Regions' support? (question of political changeover and our ability to be heard if we want to follow other orientations) • Develop a more aggressive communication: position ourselves as a national mobility cluster, at least towards Europe and third countries • Consolidate the Seine axis, making the work carried out between Ile-de-France and Normandy coherent

Weaknesses	W-O Strategy: ensure that the cluster's weaknesses will not prevent it from taking advantage of the environment's opportunities • Become the mobility referent for State operators such as the public investment bank (Bpifrance). Propose our thematic expertise during prospective events and conferences. Provide our support in the pre-selection of project proposals, which are numerous in the framework of the calls for proposals of the recovery plan • Prepare a solid communication strategy around the new brand (teaser, video, etc.). • Anticipate the next phase of competitiveness clusters with the French Association of Clusters (AFPC): phase 5 • Propose Ile-de-France and Normandy Regions to have a common communication at European level on the excellence of our territories on mobility	W-T Strategy: ensure that weaknesses in the activity will not increase the impact of environment threats • Take the lead and proposing topics to the Regions • Convince our 2 Regions to work closer on the automotive and mobility sector: embody the Seine axis trough an improved cooperation • Integrate a representative of the State in our governance (Ministry for the Ecological Transition for example)

RAI Automotive Industry NL competency map

Step 1: Areas for skills improvement identified during peer-learning, ESCA benchmarking and consultations

Peer-learning

- Business Accelerator by Mov'eo

This best practice is about accelerating start-ups and scale-ups to raise funds or to market their innovation. This is something that RAI AI NL is not doing at this moment. With this practice, we realized that maybe we need to focus more on the less mature members, helping them to achieve their dreams.

- Business Club by RAI AI NL

This is our own Best Practice. We believe that doing business on an informal manner enhances a trustworthy relationship between ourselves and our members. By connecting on a more human way, our members generate long term business aspects.

- Electric Bus EMIL by E-Mobility Cluster

This Best Practice is about E-Mobility Cluster purchasing a bus so that their members can use it as a platform to test their latest prototypes, concepts and innovations. We as RAI AI NL are providing our members the possibility to test on actual roads, but our members have to bring their own test vehicles. We could learn a lot by combining both vehicle and infrastructure as a test lab.

- Open Innovation Challenge by Mov'eo

This Best Practice has a lot of similarities with our Co-Innovation days: connecting start-ups and SME's with bigger companies. However, we do believe Mov'eo has a different approach so we can exchange ins and outs with each other.

- Jobtech by E-Mobility Cluster

This Best Practices focuses on attracting freshly graduated students into the world of the German automotive industry. This is necessary as it is increasingly difficult to find them. According to many of our members this is also the case in the Netherlands. The impact of not finding students becomes bigger. Therefore we believe a lot can be learnt from JOBTECH to connect both worlds and find employees of the future.

- Multistage Design Thinking Project Support (MDTProS) by ZONE Cluster

This Best Practice is the way to solve complex problems or to achieve successful innovations within our organization. With Design Thinking you put yourself in the shoes of customers and take their expectations as a starting point. This provides solutions that enable organizations to create real customer value. It is not always

a linear process, but more of a way of thinking, in which employees become designers and where there is a lot of freedom to bring in ground-breaking ideas.

ESCA Benchmarking

To RAI Automotive Industry NL, the benchmark-trajectory was very interesting and fruitful. The interview session gives first of all yourself as organization valuable input about your own strengths and weaknesses. The benchmark itself gives them no clear recommendations: ESCA cannot recommend actions to improve the Cluster Management Organisation's performance towards excellence. Nevertheless, there are some recommendations for RAI Automotive Industry NL. First of all on the website. Since the merge with RAI Association, the website is in Dutch. As cluster of Excellence, an English version of the website is needed. Secondly, communication with members can be improved. Members do not know exactly what our daily activities are about, a clearer communication about their added value is recommended. As third point of improvement, they identified they are often not easy accessible for internships. The added value of students is proven to be big, so they could make more use of this opportunity.

Consultations with cluster members

- We should create an online platform for questions and answers. This is how core teams can also be created. Our membership base is very diverse. With core teams we can support members more specifically.
- Improvements are within the focus on talent. Not only for ourselves, but also for our members. In addition, we could do more with data, both for smart mobility and for traffic management.
- We may profile ourselves more clearly.
- We should focus our network more on the EU.
- In addition, it is also difficult for SMEs to mix with the larger companies. We could organise tables so that smaller and larger companies come together.
- We should focus more on start-ups and scale-ups. For example, in coaching them keeping them on track. We also focus little on international players within Europe.
- SMEs think that it would be nice if we had more direction and vision within the field of communication. We lack strategy in our communication.
- Our website is poor and there is little interaction. In addition, we are now very traditional in communication. However, they do find us result-oriented.

How to use these results in our individual strategy

Based on the best practices, ESCA benchmark and consultations, we have organized an internal strategic session to discuss with our colleagues the strategy for our cluster. We focused on our strategy for the short term (with COVID-19 restrictions) and the mid- and longer term ("normal situation").

Main conclusion is that our members are part of a cluster to meet other members, get inspiration from others and set up new collaborations. Therefore, we as clusters organise many different events and activities. We can always learn from experiences of other clusters events, and will use the best practices as inspiration. On the other side: "one size fits all" is not always the case, what works well for specific cluster members, does not always work on the same level for another cluster. Therefore, it is necessary to stay in contact with individual members to receive their feedback. You could say it is an ongoing "learning by doing" experience, and as a cluster you always improve your activities. RECiPE4Mobility helps all of us, because it is a perfect platform to exchange experiences and best practices.

Step 2: SWOT analyses on cluster's own resources

Strengths	Weaknesses
Cluster's business model and internal management • A stable member contribution. • Continuous flow of European projects. • A wide range of activities • We are organized efficiently and flexibly. • Learning by doing Cluster's services and ability to attract/retain members • We know our members • Personalized approach • Wide range of activities • Correct national and international entries • We speak on behalf of SME's operational within Dutch Automotive Industry. Cluster in its environment: funders, partners, network • Strong and fixed bunch of partners (200) • Since merge with RAI Association (jan 1st 2020) a broader basis	Cluster's business model and internal management • No structural funding from the government • We are vulnerable due to smaller staffing Cluster's services and ability to attract/retain members • We have almost 200 members. That makes it difficult to give everyone equal and sufficient attention. • Some activities are not interesting enough for a large group of members • Our digital platform is not sufficient. Information about our association is difficult for (new) members to find. Cluster in its environment: funders, partners, network • No structural government support • COVID-19 has big influence on our partners, who are our funders
Opportunities	**Threats**
Cluster's business model and internal management • The variety of our members is getting wider, and with it our area of interest • The transition to digital and sustainability Cluster's services and ability to attract/retain members • Improvements in consulting our members for helping them within their business • Approaching members systematically. Some members have hardly any contact with us. Cluster in its environment: funders, partners, network • More partners can be attracted • More awareness for public-private partnerships • More awareness for collaboration on European level	Cluster's business model and internal management • COVID-19 • We can lose focus because of the broader constituency • Members who terminate their membership • Lack of government support • Losing our international competitive position. Cluster's services and ability to attract/retain members • If someone drops out of the staff, many members also drop out • Our activities are not interesting enough. Cluster in its environment: funders, partners, network • More competition with other clusters of new technologies • Focus from automotive towards mobility

Step 3: First action plan with TOWS Analysis

Topic : Business model and internal management	**Opportunities**	**Threats**
Strengths	S-O Strategy: building on the cluster's strengths to take advantage of environment opportunities The Automotive- and Mobility sector is a strong and big sector in Europe and worldwide. We represent many partners. The transitions taking place now in the sector (sustainability – digitalisation) are big opportunities for us as a cluster organization to improve our added value. In The Netherlands, the High Tech sector is very well developed (strength) and in combination with our ecosystem, we are very well positioned for future challenges.	S-T Strategy: building on the strengths of the cluster to limit the impact of environment threats We need sufficient manpower to make this topic happen. Especially now since our operational context is expanding.
Weaknesses	W-O Strategy: ensure that the cluster's weaknesses will not prevent it from taking advantage of the environment's opportunities We believe our main weakness is based upon warm communications with all 200 members. Moreover, our eco systems is expanding. This is considered as big news, so communicating this to all of our members on a warm manner is of high importance.	W-T Strategy: ensure that weaknesses in the activity will not increase the impact of environment threats It is necessary to stay focussed on a limited number of activities, to ensure enough impact. Create year-to-year workplans, with concrete focus. So choose what to do, and what not to do.

Topic: Cluster's services and ability to attract/retain members	Opportunities	Threats
Strengths	S-O Strategy: building on the cluster's strengths to take advantage of environment opportunities We have a good view on market developments in The Netherlands, and are in the right position to know exactly what our members need. This in combination with different network partners under the umbrella of our Top sector-policy, makes us the ideal partner for Automotive- and mobility companies to connect with. Our international network and partners (for developing projects and organizing events) is a strength were (new) members see opportunities.	S-T Strategy: building on the strengths of the cluster to limit the impact of environment threats Although we have a strong proposition, this is not self-explaining and our digital platform is also not sufficient. This has to be improved, to have a more easy explanation of our services.
Weaknesses	W-O Strategy: ensure that the cluster's weaknesses will not prevent it from taking advantage of the environment's opportunities The ecosystem is growing, so also our focus is more broad. This is not always good for members. That's why we invested in our relationships with other clusters in The Netherlands, and beyond. The link with RAI Association gives us also a broader platform involving other sections such as (electric) bicycles, mopeds, and chassis models. In this COVID-19 period we have (had) time to connect with our partners and members about our services.	W-T Strategy : ensure that weaknesses in the activity will not increase the impact of environment threats The membership fees are our most important resource. Less members means les membership fees and less services. Especially in this COVID-19 period, our members have big issues and there revenues are decreasing significantly. We have to make a strategy to make sure members are able to generate (new) business again and thus stay within our organization.

Topic: Cluster in its environment : funders, partners, network	Opportunities	Threats
Strengths	S-O Strategy: building on the cluster's strengths to take advantage of environment opportunities As representant of the sector, we are the ideal sparring partner for national government to work on action plans for the sector. This is especially because of our position in the so called top-sector policy: we are the representatives of the companies and sector. We speak on behalf of all our members.	S-T Strategy: building on the strengths of the cluster to limit the impact of environment threats Work closely with the regions (regional development companies) and other clusters (top sector policy) in order to be known by companies.
Weaknesses	W-O Strategy: ensure that the cluster's weaknesses will not prevent it from taking advantage of the environment's opportunities Work together with other clusters and learn from their challenges is an efficient way to improve our position in the network and the collaboration with partners.	W-T Strategy: ensure that weaknesses in the activity will not increase the impact of environment threats Secure funding, by spreading income (members, government support, projects & events).

Zone Cluster competency map

Step 1: Areas for skills improvement identified during peer-learning, ESCA benchmarking and consultations

Zone Cluster is aiming to achieve a ESCA Bronze Label by 2022. As it was pointed out during the discussions with the ESCA Secretariat, in order to complete the ESCA benchmarking process for the Bronze Label, we need to increase the number of our cluster members (from 10 members to at least 15). Right now, our members are bigger multinational companies, nevertheless Zone Cluster plans to attract SMEs in the future and provide customized business support to SMEs to stimulate their innovativeness and growth. As it was highlighted in the best practices document (Publication #1), we have already started providing new services to SMEs, namely:

1. Establishment of services for SMEs: Acceleration activities in the region
2. Market creation: Introducing a holistic design thinking and agile approach for public servants and urban mobility professionals to create user-centric, innovative solutions
3. Project generation for (future) cluster members: Administrative and project management services, expertise, and networking to strengthen the knowledge triangle between industry, academia and cities.

To make the cluster more attractive, we plan to provide more specific added-value services to the members and target SMEs with our new services. The best practices document is an excellent summary of the activities of the different clusters in Europe, and it acts as inspiration for our new activities. After exchanging those best practices, we realized that the following activities could be introduced in Hungary:

1. Open innovation: Zone Cluster could also generate an opportunity to connect start-ups, SMEs and big corporations to establish partnerships and work together on innovative solutions.
2. SMEs Groups: our cluster could help SMEs to collaborate and create value chain to find new opportunities and address larger markets together
3. Business Club: we could also introduce a new opportunity in Hungary (similar to the Business Club by RAI Automotive Industry NL) to strengthen collaboration between the SMEs and multinational companies in the region

We believe that our activities will be further improved after the training sessions led by experts in the upcoming months.

The need to improve our services was also highlighted during the consultation with our members. By conducting interviews with them, we realized that although our members are generally happy with the services we provide, they have different expectations and needs regarding our services.

Having received all the external feedback, we have also conducted internal analysis (SWOT and TOWS) to understand how we perceive our organization. Due to the challenges arising from COVID-19, we organized a

hybrid workshop (with colleagues in-person in the office or participating online) and used Miro (an online collaboration tool) for brainwriting, brainstorming and discussion afterwards. As it was pointed out in the consultation with our cluster members and in our internal assessment, one of our main strengths are the strong international network, project opportunities and our team. In the future, we could rely on these to develop new, more attractive services for MNCs and SMEs.

Step 2: SWOT analysis on cluster's own resources

Strengths	Weaknesses
Cluster's business model and internal management • Committed and motivated team • Small team size enables easy collaboration between team members • Innovative mindset • Experience in a variety of EU funding schemes, experience in project proposal writing and in project management • Flexibility and agile working methods • Low bureaucracy inside the organization • The business model is independent from state financing • Fluctuation is small due to a great work environment **Cluster's services and ability to attract/retain members** • Flexibility in introducing new services - cluster services can be dynamically extended or diversified to benefit different cluster members • Variety of expertise of the cluster members • International connections and advanced networking opportunities can be offered to the members • EU project opportunities for members • Large cluster members in Hungary can work as magnets **Cluster in its environment: funders, partners, network** • Strong network in the EU • Cluster members are the Hungarian subsidiaries of key players in IT/telecom, energy/e-mobility, air traffic man., e-bus manufacturing • Cross-sectoral collaboration with other Hungarian Clusters (agriculture, drones) • Good relationship with cities in Hungary (e.g. Debrecen, Zalaegerszeg), expert knowledge of cities needs and wants • Access to the European innovation ecosystem (e.g. Milan, Munich) from Eastern Europe • Good connections to universities (BME, PTE) and research institutes (NFF) in Hungary and abroad • Opportunity to connect stakeholders from the knowledge triangle	**Cluster's business model and internal management** • No financing from the state or a specific region, no background financing possibility • Dependency on project-related funding • Lack of hard or technical skills in the team • Dependence on external service providers (e.g. IT) • Difficulty in internal decision-making: many stakeholders are involved in cluster management decisions • Changes in cluster presidency • Smaller office: new office space might be necessary in case of growth **Cluster's services and ability to attract/retain members** • Frequent changes in cluster members' background • Accepting new members can be opposed by current members • Different long-term plans of partners • Original target (Zala) is too small for being the main focus, this can distract cooperation from other parts of the country • Only 10 cluster members • Possible services for SMEs are in the development phase **Cluster in its environment: funders, partners, network** • Politics and business interest outside the cluster has a huge influence on the willingness to cooperate • Connections to SMEs in the mobility sector could be improved • Representation of the automotive industry is low

Opportunities	Threats
Cluster's business model and internal management • Redefine the cluster's strategy in the upcoming months • Provide new services to members, e.g. focus more on education • Possibility of a variety of revenue streams • Get involved in different EU projects • Use the cluster as a bridge between different stakeholders **Cluster's services and ability to attract/retain members** • Increase the number of members during the next year • Attract more SMEs, provide membership opportunities for medium-sized innovative enterprises • Provide services that are subsidized for preferred target group (e.g.: SMEs) • Act as an innovation hub between the automotive industry and ICT • Attract Hungarian subsidiaries of multinational companies through projects with mother companies/regions • Connect the world of work with education (new training opportunities, competency frameworks) • Provide business services for market fees (e.g.: consultancy, education etc.) **Cluster in its environment: funders, partners, network** • Cooperate with more advanced EU clusters to develop common strategy • Enhance cross-border cooperation in the Carpathian Region (Slovenia, Serbia, etc.) • Quickly develop new projects from networking activities • Use the result of international projects to build business models on them	**Cluster's business model and internal management** • Obstacles in obtaining EU funding sources, proper PM guidance (i.e.: EIT UM) • Big changes in workload, but staff has to be maintained • Experience-intensive nature of EU funding schemes – employees with expertise are needed to carry out projects (0,5-1 year of learning on the job) • Unforeseen changes in memberships and members' intentions • COVID-19 – unpredictability: HO vs. working in the office, changes in internal processes, challenges in communication (network problems, etc.) • Inflexibility to extend employment rapidly (recruitment, selection and financing of competent staff is hard **Cluster's services and ability to attract/retain members** • Cluster members' project needs are connected to ad-hoc services rather than continuous representation • Different needs of partners, e.g. traditional vs. new mobility providers • No in-person meetings because of COVID-19 results in limited networking opportunities for partners • Services of the cluster can be considered for no value for money • Knowledge gap: does the cluster truly understand the needs of the members? **Cluster in its environment: funders, partners, network** • COVID-19 – unpredictability: cancelled travels, events, no in-person meetings • Highly versatile environment, continuous changes in interests, business and political environment • Changes in broader political intentions • Dependence on EIT UM projects • Heavy focus on Budapest and central regions • Automotive industry, ICT and Energy industry is integrating in urban mobility development, competition can be a problem

Step 3: First action plan with TOWS analysis

Topic: Business model and internal management	Opportunities	Threats
Strengths	S-O Strategy: building on the cluster's strengths to take advantage of environment opportunities • Follow agile processes to benefit from small team/company size, decrease administrative burdens • Use expertise in EU funding schemes to participate in more successful projects • Cluster members are the Hungarian subsidiaries of key players in IT/telecom, energy/e-mobility, air traffic management, e-bus manufacturing - use this as a networking opportunity and support cluster management's work with expertise • Rely on the committed and experienced team when redefining the cluster's strategy	S-T strategy: building on the strengths of the cluster to limit the impact of environment threats • Build on team commitment and agile working methods to cope with the COVID-19 situation • Use existing employee knowledge to train new employees • Keep the team motivated and happy so we do not have to hire new employees within short notice • Develop new skills because experience in a variety of EU funding schemes alone might not be sufficient in case of some projects • While maintaining agility and flexible internal regulations, make sure that we define processes and reduce ambiguity
Weaknesses	W-O Strategy: ensure that the cluster's weaknesses will not prevent it from taking advantage of the environment's opportunities • Many stakeholders are involved in cluster management decisions → focus on how different perspectives can establish new opportunities • Select trusted subcontractors based on previous experience and history to work with them. Exclude those with poor work and bad experience • Build and expert network for future project opportunities • Thematise driver topics for the cluster to keep focus • Enhance communication with member network to explain the necessity of certain cluster activities for long term success	W-T Strategy: ensure that weaknesses in the activity will not increase the impact of environment threats • Changes in cluster presidency can also cause changes in cluster members' intentions and commitment • Start hiring in time if a special skill is needed • Consider other funding opportunities if more problems arise with EU-funding • Voting for a cluster president who keeps the changing intentions of the cluster members in mind

Topic: Cluster's services and ability to attract/retain members	**Opportunities**	**Threats**
Strengths	S-O Strategy: building on the cluster's strengths to take advantage of environment opportunities • Continuous communication and feedback about the needs of members can help to identify new project or service opportunities • Communicate the results achieved both internally and externally to attract new member candidates interested in the cluster services • Rely on internal flexibility when creating new services • Use international network and EU project opportunities to build new services for SMEs • Build new services (e.g. education) with the help of the team's commitment and experience	S-T Strategy: building on the strengths of the cluster to limit the impact of environment threats • Participate in projects resulting from the COVID-19 situation (EIT UM) • Develop contacts on the top of the value chain of multinational companies and channel this back to the Hungarian subsidiaries to increase collaboration and commitment • Do research (e.g. through projects) to understand the needs of members • Multi-disciplinary membership within the cluster → different needs and agendas of cluster members may pose conflicts of interest in strategic decisions

Weaknesses	W-O Strategy: ensure that the cluster's weaknesses will not prevent it from taking advantage of the environment's opportunities • Small number of cluster members can allow the cluster to focus on fewer topics, satisfy the needs more thoroughly • Increase number of members so we can provide new services for them and become a stronger cluster • Analyse and discover possible cooperation between ICT, energy and automotive industry to help the development of innovative mobility services • Possible extension of the cooperation area: bigger focus than the Zala region • Aligning the long-term plans of the members with the long-term strategy of the cluster	W-T Strategy: ensure that weaknesses in the activity will not increase the impact of environment threats • Clear focus and strategic aims to introduce the relevance of activities to members • Keep in touch with clusters in similar situation to learn lessons and have an overall view in which direction processes are heading in our bigger environment (e.g.: EU, world market) • Lack of diversity in skills (i.e.: cluster management) and the attitude of members may hinder the opportunity to develop new opportunities, attract new members or retain old members

Topic: Cluster in its environment: funders, partners, network	Opportunities	Threats
Strengths	S-O Strategy: building on the cluster's strengths to take advantage of environment opportunities • Cluster members are the Hungarian subsidiaries of key players in IT/telecom, energy/e-mobility, air traffic management, e-bus manufacturing → It has great networking value when contacting possible new partners • Develop cooperation project based on mutual win-win for cluster members and international partners • Enhance cross-border cooperation by involving key organizations from Hungary • Involve Hungarian organization in the European innovation ecosystem • Share international best practices in Hungary	S-T Strategy: building on the strengths of the cluster to limit the impact of environment threats • Cluster members are subsidiaries of key players → cooperation between cluster members can be a problem due to competition • Launch projects in multiple fields using international network to outbalance risk of versatile environment • Use our international network to get more projects, avoid relying heavily on EIT UM • Rely on our good relationship with partners to generate more projects (instead of networking in person)
Weaknesses	W-O Strategy: ensure that the cluster's weaknesses will not prevent it from taking advantage of the environment's opportunities • Strengthen connections with SMEs so we can sell new services for them • Benefit from the small company size by cooperating with partners in a more flexible, agile manner • Develop a network between innovative enterprises and the cluster organization (e.g. by increasing the representation of the automotive industry) • Participate in international initiatives targeting SMEs to build a strong SME network	W-T Strategy: ensure that weaknesses in the activity will not increase the impact of environment threats • The low representation of automotive industry within the cluster can decrease the relevance of the cluster in some initiatives • Continuously monitor changes in business interests and political background to predict changing expectations towards the cluster • Try to attract automotive members or cooperation with ICT and energy providers

Conclusions

The feedback on the "Development of cluster management skills, cluster strategy and learning " activities (WP2) is very promising, as RECiPE4Mobility Partners intend to generate **new added-value support services for SMEs**, refine **cluster strategies**, and develop a sustainable **partnership strategy**.

Indeed, it is crystal clear that **peer-learning activities** have **inspired** each cluster regarding the services of other partner clusters. The **consultations**, and for some of the partners the **ESCA benchmarking**, **highlighted possible improvements** in the **daily relationship with members** and the **communication/marketing** of our service offerings. This confirms the added-value of European inter-clustering, and our clusters want ever more EU activities, as it is identified as a great opportunity by all partners, one of whose strengths is the European ambition and the willingness to generate and participate in more and more European projects.

This also confirms that we have made the right choices in selecting the first three **training sessions** for the coming months on: How to build, market and sell a service offer as a cluster? How to foster loyalty of members and attract new ones? What are the EU funding opportunities for our members (Mobility within Horizon Europe, cluster opportunities)?

In addition, this document and analyses are very promising not only for WP2 activities, but above all for the **development of the RECiPE4Mobility partnership strategy** and therefore for WP3, which will start its activities in the next days. Indeed, the **convergences and complementarities identified in the 5 Competency Maps** will be invaluable in providing each cluster with a broad and precise **vision of the strengths present in the consortium**. This will allow the identification of **'collaborations' main strategical pillars** in order to meet the **market and cluster members** needs that will be further analysed in WP3.

It can already be noted that the clusters all reaffirm their willingness to establish sustainable partnerships at European level. They are indeed all confronted with a rather **relative support of the State** in terms of funding, and with a **COVID-19 crisis** which will have lasting effects on their members. They also have a culture of animating the ecosystem which must be complemented by a **better communication and marketing** of the service offering to cope with the competition. In the face of these common weaknesses and threats, clusters sometimes converge on the strengths that characterise them and the opportunities they identify. They wish to consolidate their positioning as **European clusters** (and not only local/national) and **representatives of the Automotive & Mobility sector** towards public authorities. They are eager to **strengthen their presence in Europe**, both in networks and projects *per se*. Indeed, **cross-sectoral and cross-border collaboration** is identified as a key for the **sustainability of our clusters**, but also to increase the **quality and diversity of the services** offered by to our members.

About the RECiPE4Mobility Partners

Mov'eo (France): Gold Label automotive and mobility cluster that strengthens innovation and competitiveness of companies from Ile-de-France (Paris region) and Normandy regions. Created in 2006, Mov'eo has 620 members, from which 360 are cutting-edge SMEs operating in the urban mobility sector.

E-Mobility Cluster Regensburg (Germany): Created in 2011, E-Mobility Cluster Regensburg has the ambitious goal to place Bavaria region among the best locations for technological innovation. Particularly, in the field of electric-mobility which is part and parcel of the regional business development program. 30 out of the 40 members are SMEs.

Zone Cluster (Hungary): Created in 2018, Zone Cluster is a recent cluster which aims to become a significant European professional base for the future mobility solutions and infrastructures development. It has recently already encountered a major success being part of the EIT Urban Mobility.

RAI Automotive Industry NL (Netherlands): Created in 2011, since 2020 part of the RAI Association. RAI Automotive Industry NL is a strong and experienced cluster dedicated to working together with all automotive- and mobility related organizations to address the ongoing challenges facing the Dutch automotive industry. It regroups almost 200 members, 90% of them are SMEs.

Mobinov (Portugal): Created in 2016, Mobinov is an automotive cluster aiming to foster the growth of the national automotive sector through mobilizing initiatives and projects that enhance international competitiveness, innovation and increased added value for its members. It has 55 members, including 24 SMEs.

https://recipe4mobility.eu/

@R4M_Project

https://www.linkedin.com/showcase/recipe4mobility/