



FOODNET

Food in Eco Network

Food in Eco Network – internationalization
and global competitiveness of European SMEs
in Food and Eco Logistics Sector

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1. Introduction and aim of the FoodNet Implementation RoadMap

1.1. “FoodNet” Project

The “Food in Eco-Network (FoodNet)” project is managed in the framework of the "Clusters Go International" call (COS-CLUSINT-2016-03-01), COSME Work Programme 2016, Strand 1.a: the establishment of European Strategic Cluster Partnership – Going International (ESCP-4i).

The main objective of the proposed action is to establish and sustain after the end of action planned in this project a Food In Eco Network (FoodNet), an EU wide meta-cluster as a long term European Strategic Cluster Partnership-Going International (ESCP-4i) supporting clusters and business network organisations, their SMEs and other cluster members collaborating for innovation, market-uptake, and marketing of competitive products, services and technologies in the field of food and eco-logistics and support SMEs in global competition. Activities planned will closely follow the foreseen activities of the Strand 1 of the call.

The project addressed current needs in the area of cooperation and improving green behaviour in supply chain of food clusters and other industry clusters. Agro-Food is key industry for societies around the world. The quality and safety of food products seems to be the crucial issue. To achieve this we need to have an effective network oriented on long-term goals and supported by good logistics system.

There are four main pillars of the project:

1. Cooperation between SMEs in food market clusters (enhance their capability to be more competitive on the market including developing countries markets).
2. Cooperation between clusters to improve business processes and learn from new business models with an interdisciplinary approach. Food companies will gather the knowledge how to manage their supply-chain processes in a more effective way thanks to the cooperation with different clusters. The cooperation will result in building solid partnership and bringing added value to the all participants.
3. Eco-management. Network will be also aimed at lowering negative impact on environment. It will be possible by knowledge sharing (soft-skills improvement) and technological potential of SMEs from clusters.
4. Going to the excellence by knowledge –sharing with new market partners. Added value arises not only by getting the knowledge how to manage the processes and cooperate but also by know-how transferred to the developing countries.

1.2. Aim of the roadmap

The aim of WP4 is to develop the roadmap for FoodNet meta-cluster implementation and optimisation after the project. The aims of this WP are to ensure sustainability and enhancement of the project results and to ensure impact of methods, tools and good practice on policies and practices around SMEs and cluster effective collaboration and further internationalization.

To meet this objectives, this roadmap is proposed. The roadmap will consist in different chapters and will outline the activities that the meta-cluster will put in place. The following aspects will be considered :

- Scope of the partnership: who are the members of the meta-cluster, what are the strengths and weaknesses of the partnership and which products have been selected for which markets,
- The roadmap as such: this will describe the actions that will be performed by the meta-cluster,
- The financing of the action plan: which budget will be necessary to realise the planned actions,
- The governance of the action plan: which organisation should be put in place and how will the action of the meta-cluster be monitored and evaluated.

2. Scope of the partnership

2.1. Structure of the network

The FoodNet project relies on a complementarity between food and logistics related clusters in order to ensure a cross-fertilization of the actions.

It has been performed with a core network of 5 members :

LODZistics : Logistics Business Network of Central Poland (LODZ)

LODZistics is a bottom-up initiative for employers operating in the logistics industry and other entities interested in the development of this sector. They operate in the whole country, with particular emphasis on the development of Central Poland.

The main aim of the LODZistics is to establish a professional centre for co-ordination of the logistics potential development in the Lodzkie region and to advance its international competitiveness. The initiative has brought together businesses, R&D entities, business support institutions, while being also open to local government bodies, individuals or legal persons active in the sector of logistics and transport.

The focus of Network's activities is on:

- Promoting closer collaboration between the members
 - Building a co-operation network towards the synergy effect
 - Implementing innovative transport solutions, such as e.g. intermodal carriage, RFS in airborne transport, eco-driving
 - Providing a communication platform for exchange of information and integration of activities
- Supporting innovation and technology transfer
 - Research and Development projects

- Raising funds for R&D activities, providing consultancy and training programs
- Exchange of knowledge and experience between universities and business
- Participation in expert consultations
 - Co-ordination of infrastructural projects in the region and co-operation with the Government institutions in this respect
 - Creating an environment conducive to location and development of the logistics business in the region
- Influencing the shape of the labour and education market
 - Development of education profiles oriented towards logistics
 - Activation of the unemployed, promoting professional mobility
 - Co-operation with public and non-public education institutions and employment services
- Promotion
 - Promoting the investment attractiveness of the region and individual cities
 - Positioning the Lodzkie Region as the key logistics centre in the country, as well as in Central and Eastern Europe
 - Disseminating best practices in logistics and in the supply chain management

Logistics in Wallonia (LIW)

Logistics in Wallonia is one of the six competitive clusters recognized by the Walloon government within the framework of the Marshall Plan launched to boost the Walloon economy. Logistics in Wallonia carries out three very complementary basic missions in order to ensure that Wallonia really is a ‘land of logistics’

- Innovation. To stimulate and encourage technological innovation from enterprises within the sector, along with cooperation between enterprises and universities, we have set up a department dedicated to innovation.
- Networking. By organizing meetings for members and work groups, along with making available and communicating information from the sector, we ensure that there is a network for those involved in Transport and Logistics. This vital mission enables us to meet players from our sector, to get to know and understand them in order to include them, where appropriate, in innovation projects.
- Promotion. One of the three axes we have selected is to promote the advantages of Wallonia in terms of transport and logistics beyond our own borders. This is in particular carried out by taking part in shows, conferences and meetings.

LIW has significant expertise in innovation and project management. Some actions were destined to the food sector due to the specific logistic requirements of this branch of activity. Moreover, LIW also manages a program (Lean and Green) which aim is to coach logistic and industrial companies to reduce their CO2 emissions.

AgroTransilvania cluster (ATC)

AgroTransilvania Cluster, based in Cluj, is a professional association of 70 members in the field of agri-food (including input suppliers, farmer associations, processors, 3 universities, 5 research institutes, 1 commercial bank, 2 consulting companies, 2 local/regional authorities, distributors, catalyzing institutions).

AgroTransilvania Cluster is created to support the development of agri-industrial sector, by increasing the competitiveness of the association itself and its members individually, both on national and international market, based on a common development strategy. The main activity of the association represents the integration of all these entities into a sustainable and competitive value chain, that could bring notoriety and visibility to Transylvanian's local products. The vision of the cluster is to become an integrative pole of sustainable development of agroindustrial sector in Transylvania (Nord-West of Romania) and to support the sustainable competitiveness of the agri-industrial sector.

The mission of the Agro-Food-Ind Napoca Cluster (AgroTransilvania Cluster) is to promote collaboration and cooperation between business entities in the agricultural industry and encouraging competitive restructuring of the sector, as well as ensuring participation in multiple commercial project, both national and international. In this regard, members of the "Agro-Food-Ind Napoca Cluster" decided to join forces to support the development of the agro-industrial sector, with the aim to build on the competitiveness of the association - both on the national and international markets. The assumed mission is to become an Integrative Pole of Sustainable Development of Agri-Industrial Sector in Transylvania (Nord-West of Romania) (Supporting of the Sustainable Competitivity of Agri-Industrial Sector).

The cluster includes various members with direct/indirect implication into agri-food sector: input suppliers (tools, machines, software etc.), producers, processors, manufacturers, distributors, universities, consultants and administrative authorities. The main activity of the association represents the integration of all these entities into a sustainable and competitive value chain, that could bring notoriety and visibility to Cluj local products.

Coexphal - Association of Fruit and Vegetable Producer Organisations of Almeria (COEX)

COEXPHAL (est. 1977) is an association of cooperatives and enterprises in the province of Almería, Spain, that harvests and exports fruit and vegetable products. It is responsible for 65% of fruit and vegetables grown in Almeria and 70% of all exports. The associated enterprises produce a total of 2 1/2 million tonnes annually, with a turnover of 1,700,000 Euros. 23.100 hectares are under cultivation by its 9.300 growers and through the commercialization of products by its partners. It employs 40.000 workers from more than 150 countries.

COEXPHAL main challenges are developing, improving and innovating in the agricultural sector, with the aim to promote the development of a sustainable food system. Originally initiated to

help farmers organize, sell product and to export to other markets, it now functions to aid its members in a wide array of areas. 85% of their members (100 in total) are cooperatives and social enterprises. It has a well-developed department of R+D+I and a clinical analysis laboratory.

COEXPHAL has two offices of more than 500m² and a laboratory of 3000 m² with a budget of 4 million Euros. Lecture rooms and an auditorium accommodate small and large groups. The 50 employees come from departments offering the following services : education and training, marketing and external promotion, research and statistics, communications and press, insurance, human resources and immigration, grant administration, risk prevention, a travel agency, and quality control. In addition it has an OTRI and a laboratory dedicated to agricultural innovation, biological control and clinical analysis.

COEXPHAL has many international contacts and visiting researchers from many countries and has the infrastructure to provide for their needs. They offer courses which combine farm and cooperative site visits, lectures and interaction with cooperative entities and administration representatives.

Latvian Logistics Association (LLA)

Latvian Logistics Association (LLA) is a voluntary association of legal entities and private individuals in Latvia. Organizations and specialists in the fields of logistics and customs have joined in LLA with the main goal to promote international trade, ensure safe and reliable cargo flow through Latvia and develop logistics and customs brokers' activities in Latvia. LLA (formerly - Logistics and Customs Brokers Association of Latvia) was founded in 1997 and was the first organization in Latvia set up with clearly stated intention to support customs brokers as professionals.

LLA is active in co-operation of the Supply-Chain Council who are developing and endorsing the SCOR model, as the cross-industry standard diagnostic tool for supply-chain management. LLA is in active co-operation with European Logistics Association and CONFIAD Pan European network also.

Latvian Supply Chain Cluster (LSCC) is a branch of Latvian Logistics Association established with financial support of Ministry of Economics of Latvia. LSCC as consortium of leading manufacturers, logistics and R&D institutions, is established with the primary goal of value creation for all supply chain partners, including manufacturers, suppliers, distributors, customers, and customers' customers.

LSCC core competence is Supply Chain Strategy development and implementation for particular market or segment in order to operationalize and support companies' business strategy. LSCC's long term corporate level strategy is to position LSCC as green TEN-T core network infrastructure based Supply Chain Cluster.

LSCC current focus is facilitation of the productivity of business and network processes by using SCOR model, as the cross-industry standard diagnostic tool for supply-chain management. LSCC is open for a new members interested in co-operation between business and research as well as national and international networking in the field of logistics and supply chain management.

Besides these five founding members of the FoodNet network, different organisations signed a letter of interest and support at the application phase or during its realization. Here's a list of these supports :

SAN ISIDRO LABRADOR	Food production, packaging and commercialisation	Spain
COSTA DE NIJAR	Food production, packaging and commercialisation	Spain
Dunamar	Food production, packaging and commercialisation	Spain
DUNIAGRO	Food production, packaging and commercialisation	Spain
GREENCOBI	Food production, packaging and commercialisation	Spain
AGROCOLOR S.L.	Inspections and audits of main standards of agricultural production and food safety	Spain
HORTYFRUTA	Interbranch organisation of Fruit and Vegetables from Andalusia	Spain
CARGOLINK Express	Logistics provider	Poland
moviGO	Health/beauty industry	Poland
LIKImobileSolutions	Dedicated IT solutions, software and mobile applications	Poland
Polcontact	Electric heating systems	Poland
AgroFreshPark Łódzkie Poland	Sustainable, high-tech agro-logistics centre in Poland	Poland
PROYECTA	Engineering and consultancy	Spain
COHORSAN	Food production, packaging and commercialisation	Spain
FEPEX	Production and exploration of fruit and vegetables, potatoes, fruit and vegetable products, flowers and plants and defence	Spain
FAECA Granada	Cooperative food producers defence and representation	Spain
Fundacion Cajamar	Agro-sustainability, food and health, bio economy, greenhouse technology	Spain
Lodz Chamber of Industry and Commerce	Supporting companies in Lodz region	Poland
Marshal's Office of the Lodz Region	Regional public authority	Poland
Warsaw Chamber of Commerce	Supporting companies in Warsaw region	Poland
The cluster Subcarpathian Flavours	Cluster Subcarpathian Flavours, Animator Association for Development and Promotion of Podkarpackie	Poland
Polish Chamber of Commerce	Biggest business organization in Poland. Promotes social responsibility of business and takes care of the interests of Polish entrepreneurs abroad	Poland
Tecnology Center TECNOVA	Agriculture, Postharvest, foodproduction Packaging	Spain

Association Accelerate (Starptautiska attistibas asociacija Accelerate)	Introducing sectoral cluster concept and cross-sectoral co-operation in the economy of Latvia	Latvia
Transport and Telecommunications Institute	Private university of applied science Transport and Telecommunication Institute, conducting the diversified research scientific work	Latvia
TransRailCargo	Container transportation by rail, intermodal logistics, 3PL services in Riga, Moscow, Almaty	Latvia
Association of Latvian Crayfish and Fish Breeders	Organisation representing interests of small SMEs involved in aquaculture business	Latvia
Youth and Agriculture Project	Training and teaching in the fields of agricultural production, food production, enhancing young generation to work with rural communities	Iraq
ARIES Transilvania (Romanian Association of Electronics Industry and Software - Transilvania Branch)	Largest and the most influential organization created for the IT&C industry in Romania	Romania
Transilvania Creative Industries Cluster	Cluster of creative industries	Romania
University of Agricultural Sciences and Veterinary Medicine Cluj-Napoca	Entrepreneurial university connected to the socioeconomic environment	Romania

During the project, the partners aimed at enlarging the meta-cluster to additional organisations. The following organisations have joined the meta-cluster as members:

North-South Logistic and Transport Cluster	Tranportation and Logistics, Logistical Services and Mobility Technologies, Hybrid and Electic Vehicles, Shipbuilding	Full member	Poland
Competetiveness pole of Bizerte	Consists of agrifood technopole, a network of Agro'tech partners and industrial areas	Full member	Romania
AGRINOVA Cluster	Competitiveness cluster aiming at the enhancement of the attractiveness and competitiveness of the agricultural and agrifood sectors in the Regions of Fes-Meknes & Daraa-Tafilalet	Full member	Marocco
HORTIESPAÑA	Supports and promotes the improvement and knowledge of production, different markets and the extension of more sustainable transport	Full member	Spain
AgroBioCluster	Agro-food & bioeconomy cluster	Full member	Poland
APROA	Association of Fruit and Vegetable Producers Organisations	Associated member	Spain
PerfectPlus	Catering Supply Company	Associated member	Poland
Warsaw Chamber of Commerce	Providing information that is both informative and up-to-date to our visitors, potential and current	Associated member	Poland

	Chamber members, and businesses & individuals who are interested in moving to the Warsaw		
Polish Economic Society	Independent national association of economists, aim is to contribute by its activities to the development of economic thought and culture in Polish society	Associated member	Poland
Latvian Bakers Association	Voluntary professional organisation which shares interests in the development of the bread industry and cooperates to protect and represent the interests of bakers	Associated member	Latvia
Vidzeme Planning Region (VPR)	Vidzeme Planning Region (VPR) is one of the five planning regions in Latvia. It organises and implements regional spatial development planning, as well as ensures the regional and local representation in development of business, employment and social policy.	Associated member	Latvia

This network shows a wide variety of organisations with different backgrounds and different maturity levels. The challenge will be to stimulate a seamless collaboration between these different organisations. The process is ongoing as the meta-cluster is open to new members and entities that would like to support the cluster activities.

2.2. SWOT analysis

During the WP2 of the project, a SWOT analysis of the FoodNet meta-cluster was performed. We need to keep in mind that the FoodNet meta-cluster also choose target countries which are Canada, China, Middle East and USA. It should be also noted that we are not limiting the meta-cluster only to those markets. Recruitment of new members which is a continuous process may result in joining other key and engaged members that may have interest in other markets too.

Here is a summary of this SWOT analysis.

<p>Strengths :</p> <ul style="list-style-type: none"> - Large number of involved stakeholders experienced in logistic services - Food sector companies’ joint interests - Complementary knowledge and skills - Some of the partners have experience in few of the selected markets - Some of the partners have experience in value chain development 	<p>Weaknesses :</p> <ul style="list-style-type: none"> - Insufficient knowledge and experience on the selected markets: legislation, social norms, phytosanitary requirements and procedures, etc. - Rather low number of involved food producers and processors - Insufficient financial sources for development of value chain collaboration - Several members are lacking competences on value chain collaboration
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<ul style="list-style-type: none"> - Involvement of RTD stakeholders, being able to develop value chain models, to provide knowledge - Experience in web based promotion, communication and collaboration 	<ul style="list-style-type: none"> - Extreme price sensitivity for logistics companies - Insufficient SMEs competences and capacity on internationalization - Difficulties to identify business partners in the selected markets as customers and in EU market as partners for going internationally
<p>Opportunities :</p> <ul style="list-style-type: none"> - Internationalization support services at national level and EU market promotion and internationalisation programmes - EU location as quality mark - Selected markets demand for food products 	<p>Threats :</p> <ul style="list-style-type: none"> - Competition from non-EU clusters and producers - Cost of meeting regulations and standards - Unknown administrative and legal barriers - Cultural differences of potential partners from targeted markets - Political situation in target market countries

2.3. Scope of the products

The FoodNet meta-cluster’s strategic objective is to support the European food sector companies in market development and especially internationalisation, what includes identification of external markets, creating favourable paths, and provision of knowledge and skills necessary to become globally competitive and perform successfully in the international arena. As part of the Joint Internationalisation Strategy, a SWOT analysis has been elaborated in order to determine most important factors in relation to potential exports selected product groups to selected target markets. The strategy is focused on three geographic regions. They are: 1. North America: Canada, USA. 2. China. 3. Middle East: United Arab Emirates, Saudi Arabia, Kuwait, Oman and Iraq.

Here’s the summary of the products that have been considered to enter the respective markets :

Target market	HS codes of products	Description
Canada	4	Dairy produce; birds’ eggs; natural honey; edible products of animal origin, not elsewhere specified or included
Canada	7	Edible vegetables and certain roots and tubers
Canada	8	Edible fruit and nuts; peel of citrus fruit or melons
USA	4	Dairy produce; birds’ eggs; natural honey; edible products of animal origin, not elsewhere specified or included

USA	7	Edible vegetables and certain roots and tubers
USA	8	Edible fruit and nuts; peel of citrus fruit or melons
Middle East	7	Edible vegetables and certain roots and tubers
Middle East	8	Edible fruit and nuts; peel of citrus fruit or melons
Middle East	10	Cereals
Middle East	14	Vegetable plaiting materials; vegetable products not elsewhere specified or included
China	4	Dairy produce; birds' eggs; natural honey; edible products of animal origin, not elsewhere specified or included
China	7	Edible vegetables and certain roots and tubers
China	8	Edible fruit and nuts; peel of citrus fruit or melons
China	10	Cereals

3. Implementation roadmap

Important notice: it must be mentioned that it is not possible to point out clear and definite responsibilities for each action of the roadmap at the moment this document is written. The five founding members of the FoodNet meta-cluster have not yet taken a final decision about a potential application for a Strand 2 project. Two founding members (COEXPHAL and LIW) have informed that, due to internal reasons, they will not participate in a Strand 2 proposal if this one is done.

For each (meta)cluster, service offer is a challenge as companies can benefit from services from other type of organisation such as trade promotion organisations (TPO), chambers of commerce (CCI) or even private consulting companies. Nevertheless, as the target group of clusters are mostly SME's, these companies do not always have the means to hire expensive consultants and TPO's and CCI's may be too generalist and not focused enough. Therefore, (meta)clusters can find a niche where their services can be differentiated from other organisations.

A re-designed portfolio of potentially revenue generating services is key to ensure the long term sustainability of the partnership. Ideally, the service portfolio should be concise and not too long, and it is also recommended to group specific services into service categories. Noteworthy, the service portfolio should always be specific to each case and based on the market analysis results.

Potentials services can be split into different categories:

- Networking :
 - Matchmaking and partnership building;
 - Organisation of international missions and SMEs matchmaking;
 - Organisation of networking and B2B activities in the foreign targeted countries;
 - International events and exhibitions;
 - Partner search in the foreign country.
- Training, Capacity Building and Advisory :
 - Trainings, workshops and bootcamps;
 - Identification of calls for proposals that allow the collaboration between EU and non EU companies;
 - Identifying funding opportunities.
- Internationalisation :
 - Internationalisation and new market entry strategies;
 - Market trends and opportunities;
 - Product positioning and market assessment;
 - Orientation on new markets and strategic localisation;
 - Strategic market monitoring;
 - Advice to adapt the product to the new market;
 - International technology transfer;
 - Intellectual property advice;
 - Support and encourage R&D collaborations.

At this point, it is of great importance to start calculating the costs to execute each of the services within the portfolio and to define selling prices for each service (or for some, and have a mixed portfolio of free of charge and payed services).

3.1. Market studies

In the framework of this document, we will not come back on the SWOT and PEST analysis that have been performed during WP2 of the project; deliverable 2.2. gives extended information about the potential of each of the chosen market. Moreover additional information has been provided to Partners in WP2 to deepen their knowledge on China and Saudi Arabia market:

1) import requirements in China in WP2 on :

- Market characterisation (SWOT+PEST) – potential to export selected products
- Specific legal aspects of the target markets related to the internationalization: product certification, customs clearance
- Specific logistics aspects of the target markets related to the internationalization: the role of packaging and labels, importance of expire date, distribution channels and the role of an intermediary

- Specific marketing aspects related to the internationalization of the product on the target market: product adaptation to enter the market, omni-channel sales, product promotion.
- Database of institutions supporting the export of food products to the target market
- Level of consumption

2) EC report The Food and Beverage Market Entry Handbook: Saudi Arabia - a Practical Guide to the Market in Saudi Arabia for European Agri-food Products and Products with Geographical Indications.

As products and markets have been selected (see 2.3.), it will be necessary to perform a more precise market study to assert the potential of each range of products on each market.

In order to fulfil this, market specialists (instead of product specialists) will be hired to perform a more precise and narrow market survey. One specialist will be taken by country and will perform a market survey in the first six months of the action plan.

The market surveys will allow us to confirm that the mix between products and markets is the right one. If necessary, the FoodNet members will decide on the opportunity to enlarge the range of products to be selected for each targeted market.

3.2. Selection and screening of companies

The results of the market surveys will be aggregated by the FoodNet members in order to compose a portfolio of companies from the different FoodNet regions.

Each partner of the meta-cluster will approach its members inviting them to join the initiative and explaining the willingness of the meta-cluster members to assist them in exploring new markets. Once the acquisition of companies is done, these companies will be screened in order to assess their level of readiness to tackle these markets. The following aspects will be reviewed :

- Type of products produced by the company,
- Capacity to adapt the products and / or the packaging to local requirements,
- Obtained certification,
- Capacity to adapt the level of production,
- Competence in the company (knowledge of languages...),
- Logistic expertise of the company,
- Willingness and capacity to develop a medium-term strategy.

If we see some shortages in one of these aspects, the company will be directed to an expert to help them. This expert can be someone from the meta-cluster (staff member) or an external consultant. In this case, the company will be informed about potential costs. The training material developed in WP2 will be useful in order to organise collective training sessions for these companies.

3.3. Research for partners

Based on the results of market studies and selection and screening of companies, potential partners will be sought after in each of the targeted market.

To achieve this, the FoodNet members will rely on their TPO's and embassies on location. With their help, lists of potential importers, distributors and sellers will be established; these potential partners will be approached by the FoodNet members (a division of the work will have to be agreed) in order to test their interest for the European products.

3.4. Events

Trade shows are an excellent place to have a general overview of a given market in a given country. Food industry is no exception as different trade shows are organised also in this industry. This forms also the perfect platform to establish first contacts with potential partners likely to work with European companies.

The first year of the action plan will be dedicated to visits to some trade shows. The selected trade shows for this first year are :

- **Gulfood – Dubai – 16 to 20 february 2020**

Gulfood 2020 is a renowned international platform dedicated to the food and beverage processing in the MEASA region. This expo provides excellent opportunities to launch new markets and provide brand awareness to emerging companies. More than 98,000 professional attendees will be able to explore the production of over 5,000 exhibitors.

The wide range of product sectors showcased at the show will feature Meat & Poultry, Pulses, Grains & Cereals, Dairy, Power Brands, Fats & Oils, Beverages, Health, Wellness & Free-from, World Food. Government representatives, heads of state and ministers from more than 20 countries will be part of the event in the bilateral trade agreements during the Gulfood.

The diverse supporting program of the show including award shows, presentations, competitions that will make the visitors' attendance at the show even more exciting. The Gulfood Startup Program allows investors to explore the innovative products that the F&B sector can offer.

It will be even more important to visit this fair as the Universal Exhibition of Dubai will open in October 2020.

- **SIAL Canada – Montréal – 15 to 17 april 2020**

SIAL Canada is not only the meeting point for the entire Canadian agrifood industry, but also the preferred gateway to the American and international market. In fact, the show is the only event of this scale in Canada today, bringing together more than 800 national and international exhibitors from 45 countries and welcoming more than 14.000 buyers from Canada, the United States and also 64 countries in an exhibition space of 240.000 sqm.

SIAL Canada is the only national trade show, offering a full range of food products under one roof, thus meeting the expectations of your customers, whether they are retailers, restaurants or food processors, looking for new, innovative products, of ethnic or regional specialties, from here but also from around the world.

- **SIAL China – Shanghai – 13 to 15 may 2020**

SIAL China is a leading annual trade fair for the food & beverage industry held concurrently with SIAL Wine World and bringing together more than 100,000 visitors yearly. The 2020 edition is expected to surpass those numbers by attracting even more international visitors, including decision makers, major industry players and media representatives.

The rich program of SIAL China 2020 will include a wide variety of events showcasing the various products on display, including Chocolate World, China National Specialty Tea Brewers Cup Event and The Fresh – Right Seafood Right Wine. Two forums - Retail & Hospitality and Consumer Goods, will also be held, alongside two competitions - SIAL Innovation and La Cuisine. The recently designed Buyer Match-Making networking platform will make the connection between potential business partners easier and more efficient than ever.

- **The Summer Fancy Food Show – New York – 28 to 30 June 2020**

The Summer Fancy Food Show is the largest specialty food industry event in North America, and the premier showcase for industry innovation. It is considered as the place to see and taste the future of food in Northern America.

3.5. Organisation of B2B meetings

If the interest is present and sufficient, B2B meetings will be organised by the end of 2020 or in the beginning of 2021 (one action in each targeted country). Concerning Middle-East, the focus will be placed on KSA and UAE and a special attention will be dedicated to Dubai because of the Expo Dubai. These meetings will be financed by the companies or co-financed if additional funds will be available for such purposes.

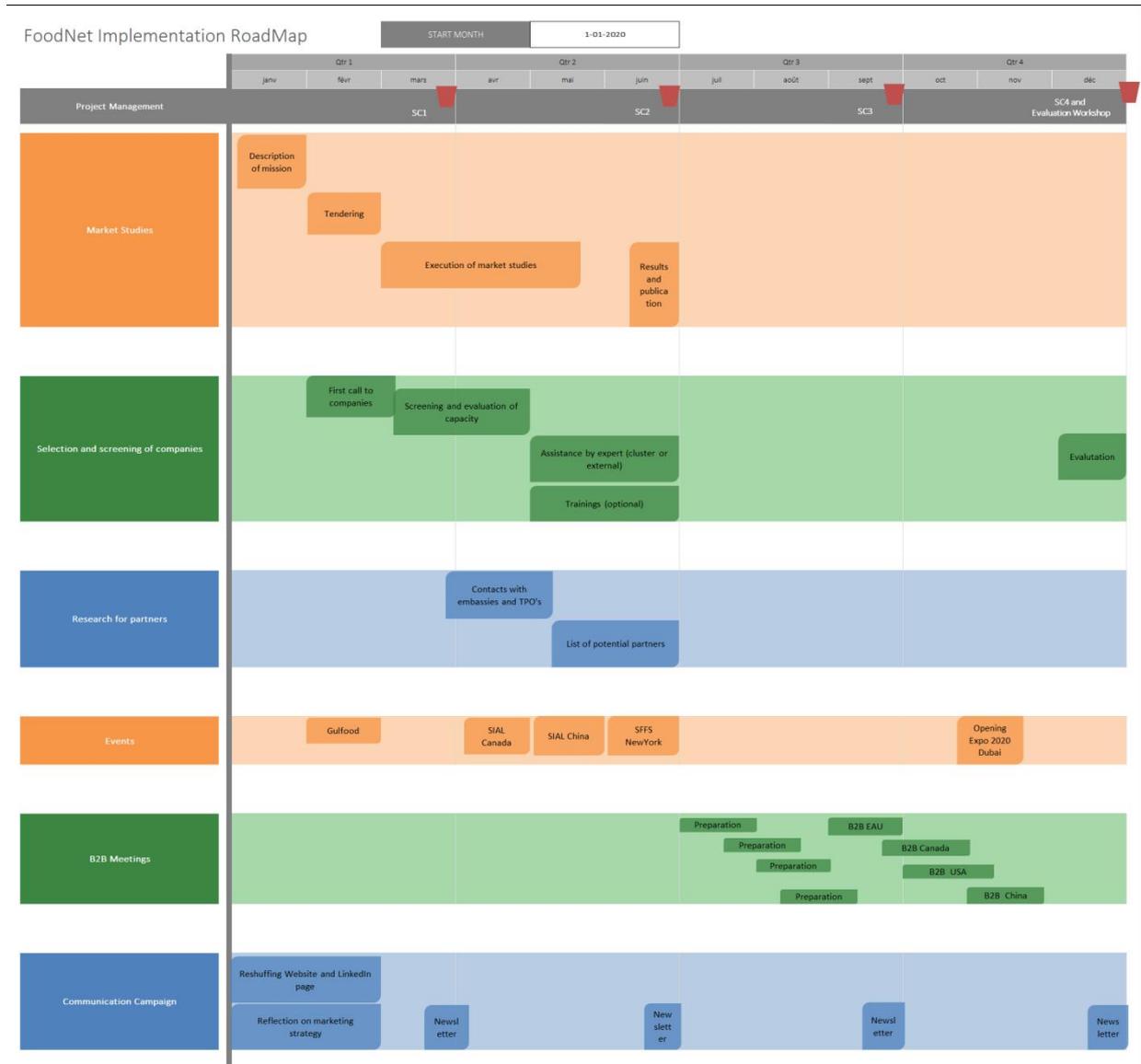
3.6. Communication Campaign

The communication strategy will be created and implemented to reinforce and sustain the knowledge about the meta-cluster and its activities, not only in the FoodNet regions but also in other European regions and abroad in the target markets. The strategy will encompass the following components

- Development of a strong marketing strategy using both the FoodNet brand reinforced by the “Enjoy, it’s from Europe” brand; this will help us to build on an existing communication campaign from the EU and to reinforce our own actions. The common image to be supported by marketing messages and a common strategic approach will be defined in order to create sustainable activities;
- The corporate-type website of the FoodNet network will be adapted to reinforce the visual communication and brand recognition where all the information about the meta-cluster will be made available as well as the dedicated repository for the cluster members;
- A use of the ECCP European platform will be significantly enhanced as a tool to spread the knowledge of the meta-cluster to other projects / organisations within Europe and as a platform to increase the visits to the corporate website;
- The LinkedIn FoodNet profile will be reviewed and linked with those of the counterparts in the target markets to spread the knowledge as widely as possible and providing updated news of the Network’s activities. In addition, the partnership will be redistributing relevant information about the target markets to the followers on LinkedIn. A special attention will be dedicated to China as some “regular” web services are not allowed in China (Google, Facebook, WhatsApp...). A special presence on the WeChat network will have to be considered;
- Press releases and specific communication messages will be released in a form of newsletters and short videos posted on a YouTube channel.

Specifically, the partnership is aiming to explore new means of communication through on site promotion during specific events presenting the references to the clusters, the companies and their products. The dissemination activities will be used to inform the media, customers, and competitors of the offer of the FoodNet members.

The Implementation Roadmap is presented below:



4. Financing of the Action plan

4.1. Budget

Here’s a provisional budget with the expenses for year 1 :

Item	Cost
Market research Canada	5.000 €
Market research China	5.000 €
Market research Middle East	8.000 €
Market research USA	5.000 €
Factfinding and visit Gulfood (2 persons)	4.000 €
Factfinding and visit SIAL Canada (2 persons)	6.000 €
Factfinding and visit SIAL China (2 persons)	6.000 €
Factfinding and visit SFFS (2 persons)	7.000 €
Research for partners in the targeted countries	10.000 €
B2B meetings (5 editions)	50.000 €
Revision of FoodNet website	5.000 €
Communication on social networks	5.000 €
Videos (maximum of 10)	20.000 €
TOTAL	136.000 €

Table 1. Expenses for year 1

4.2. Financing of expenses

The financing of expenses will be a challenge. The first year will be dedicated to the defining of a specific business model for the sustainability of the meta-cluster. Our analysis in WP2 has shown the difficulty of having a sustainable financing without public financing.

The FoodNet members will explore the possibility of introducing a Strand 2 application in the COSME program where the planned expenses could be covered by a budget from the EU.

Nevertheless, private resources will also be explored, mainly :

- In-kind resources from the meta-cluster members,
- Human resources,
- Mutualization of actions, communication, knowledge and databases (building on what has been already developed and planned inside each member of the meta-cluster),
- Participation of the meta-cluster in projects,
- Other financing sources such as fees from events.

5. Governance, reporting, evaluation and success factors

5.1. Governance and organisation

In order to implement the roadmap in an efficient manner, the FoodNet meta-cluster must put in place a governance that will monitor the roadmap and the execution of the action plan.

To achieve this, the meta-cluster must do the choice between creating or not creating a legal entity.

The meta-cluster can choose for a “**Not for profit organisations (NPO)**”. NPO’s are legal bodies that predominantly work to serve the public benefit or the mutual interest of their members. They might be associations, foundations, or other specific types of NPOs, depending on national regulations. In order to create a NPO, the following elements must be taken into account :

- There is no requirement of minimum capital.
- The NPO cannot aim to make profit, but it can charge membership fees and organise activities in return for payment where these are compatible with its purpose.
- The NPO cannot distribute profits to its members.

The definition and consistency of the regulatory framework vary in different European countries. An association is a suitable legal entity form to attend the interests of the partnerships, aiming to serve their members and create benefits for all of them.

Another possibility is the creation of an “**European Economic Interest Grouping (EEIG)**”. An EEIG is a legal model created under the European Community. The main aim of this regulation is to minimise legal obstacles that organisations would have while operating across borders. This regulation allows organisations from different Member States to join a single EU level legal entity by providing the ideal legal structure to support and encourage the development of economic activities.

From a legal perspective, an EEIG must be formed to support the economic and business activities for the members and should be non-profit making. Thus, it cannot :

- Be primarily forced into making profits (though it carries profit making activities)
- Control activities of its member or of any other undertaking
- Hold shares of its members
- Take investments from the public
- Be a member of another EEIG
- Employ more than 500 people
- Violate national laws in what concerns specific money transfer and other specific rules

Overall, benefits of an EEIG are the following :

- It removes the bureaucracies for organisations working across the EU borders and helps the development of cross border alliances and foster internationalisation,

- It is a very flexible legal instrument,
- Groupings do not have to pay corporate and earning taxes and can run their own businesses with their own trademark.

This is another interesting legal model to be taken into consideration by the ESCP 4 i, as it is covered under the EU Law and it is suitable to fit the interests of the partnerships and consequently of its clusters and SMEs.

Having said this, we believe that the FoodNet meta-cluster is not mature enough to start with the setting up of a legal entity.

Nevertheless, in task 4.1., it has been shown that it is important to have a flexible working process. In this respect, for the daily management of the meta-cluster, the founding members will create a Steering Committee (SC) with a representative from every founding member. This person needs to be officially appointed to represent its organisation and to take commitments that will be implemented inside every organisation. In this sense, this person will be responsible for the right execution of the roadmap.

The SC will meet virtually once a quarter and physically once a year at a minimum. It will also appoint one of the member as chairman for a period of one year; the chairman will rotate every year in order to ensure a balanced representation of every members in the decision-making process.

5.2. Reporting and KPI's

In order to ensure that the monitoring of the meta-cluster activity can be shared on an equal manner, KPI's are determined.

KPI's are chosen on three levels :

- Cluster KPI's : this category will allow to monitor the status and the evolution of the meta-cluster. It will also reflect the vitality and dynamism of the partnership.
- Activity KPI's : these KPI's will measure the activity of the partnership and will give to the members a tool to monitor the yearly activities. It will also help the partners to plan the activities of the FoodNet meta-cluster in their respective annual action plans.
- Company KPI's : although they are the most difficult to build and monitor, it is of crucial importance that the FoodNet partners monitor the real impact of their activity on their companies. Cluster organisations can only have sense if they succeed in involving companies in their activities AND if these activities allow their members to generate additional sales and turnover.

We will now review the chosen KPI's

1. Cluster KPI's		
1.1.	Number of members of FoodNet	This is a basic indicator but it is essential. The FoodNet meta-cluster must not grow only for the sake of growing but the growth of the number of members demonstrate the attractiveness of the meta-cluster and the willingness of more organisations to work with the members of the meta-cluster.
1.2.	Number of companies of the FoodNet members	This a consequence of KPI 1.1.; as clusters are most of the time members' organisation, the more clusters join the network, the more companies the meta-cluster represent.
1.3.	Number of countries represented through the FoodNet membership	The founding members of FoodNet come from 5 different European countries. As for KPI 1.1., the network should not grow at any cost but, if organisations from other countries want to join, this demonstrates that the FoodNet meta-cluster has been able to demonstrate its interest and its attractiveness as in the case of the FoodNet member AGRINOVA cluster from Marocco that joined the meta-cluster. Moreover, the more countries are represented, the more possibilities it offers to member companies to meet and to partner with new and unknown partners so far.
1.4.	Number of letters of intent	As a meta-cluster is a rather new and developing concept, organisations may be interested to follow the activity of the meta-cluster but can also be reluctant to join as a full member. In this respect, letters of intent are an interesting tool to motivate organisations to join and follow the activity of the meta-clusters. These organisations may become full members of the future; letters of intent can be seen as a "waiting room" for organisations interested to join.

2. Activity KPI's		
2.1.	Number of joint events / activities organized (or supported) by FoodNet	In order to act as a real meta-cluster, a minimum of two partners have to join forces to set up an event or an activity aimed at one of the target market.

		This KPI will show to what extend the members of the meta-cluster are involved in the organisation of joint events and / or activities.
2.2.	Number of companies involved in the organized joint events / activities	This KPI goes naturally with the previous one. If members organise activities, they do it for the benefit of their members. This means that the involvement of companies is a crucial point.
2.3.	Number of contacts made by the participants at FoodNet joint events / activities	As many people say : “Contacts lead to contracts”. As business is a matter of people, it is of the utmost importance that joint events organised by the meta-cluster expand the horizon of their members by setting the scene for new contacts. Even if not all contacts can be directly fruitful, the members should pay a lot of attention to the diversity and the quality of the contacts they provide to their member companies.
2.4.	Number of follow-up meetings after first contacts	This KPI will be more difficult to monitor but is essential. A first contact between two companies can generate interest and enthusiasm but the most important is the second contact. This means that follow-up is important and clusters can play a role in this by providing assistance to their member companies.

3. Company KPI's		
3.1.	Increase in sales in the targeted country (in %)	The first meaning of our joint activities is that our members companies can make more business and generate more revenue. If our activities are successful, our members will have a bigger turnover in the targeted country. Nevertheless, we will need to ensure the companies that information will be used in a confidential way so that we can monitor our activity without endangering their competitive position.
3.2.	Number of contracts signed	If companies generate more business in a targeted country, they may feel to conclude a more formal contract in order to establish a long-term and sustainable relation with local partners (wholesalers, distributors, big retailers).

3.3.	Market share of the targeted country in the export portfolio of the company (in %)	Another way to measure the performance of the meta-cluster is to measure the real impact inside the results of the members. As FoodNet aims at approaching new markets for food companies, it will be necessary to see before the activities the share of the targeted countries (China, Canada, USA and ME) in the export turnover of the companies. The rise of this share will demonstrate that the members have really benefited from the activities of the meta-cluster.
3.4.	Number of new jobs created in the company	The aim of cluster organisations is to support the development of their members. To a larger extent, clusters should support the long term development of enterprises in order to make them bullet-proof for the future. In this respect, it is interesting to see the evolution of the size of companies. Creating new jobs should always been seen as the ultimate goal of economic development in order to have more sustainable societies relying on strong companies. Of course, this KPI will be influenced by other factors and it will be difficult to isolate the FoodNet activities in the global picture. Nevertheless, we consider it as an important aspect to consider.

At the beginning of the implementation of the roadmap, the Steering Committee of the meta-cluster will decide the target to reach for each KPI. This will allow to monitor the efficiency of the action plan.

5.3. Evaluation of the action plan

An evaluation of the action plan deriving from the roadmap will be performed. This evaluation will happen on three levels.

Each activity of the meta-cluster will be evaluated individually; an evaluation form will be developed for every activity and each participant will be asked to fill it (we aim at a response rate of 100%); this will allow the members of the meta-cluster to have a feedback from the organized activity and to adapt and improve the format of the activity.

Each year, the members of the meta-cluster will also make a general evaluation and will gather the information to fill the KPI's as explained above. Therefore, a dashboard will be developed where every KPI will be taken and filled. The dashboard will be discussed inside the Steering Committee and gaps between the targets and the results will be analysed in order to understand why some targets may not have been met. This will also allow the meta-cluster to reconsider the action plan or to fine-tune some details in the organisation of the activities.

Besides the yearly evaluation, the FoodNet members will also perform a “meta” evaluation. It is actually important that the organised activities bring added value for the companies which are members but the FoodNet members must also consider a more systemic evaluation to see the effects of the sequential process of the roadmap, if the mutualisation of resources really generates a multiplier effect, a scale effect and a synergistic effect. To achieve this, the FoodNet members will organise an annual one-day workshop (together with the physical SC) in which they will evaluate the level of gathered competence inside the meta-cluster and in the members of the meta-cluster, the side effects of organising collective activities (contacts and agreements amongst delegation members) and the impact of the common communication campaign.

5.4. Success factors

The final chapter of this roadmap reports the preparation work done through task 4.2 to identify why meta-clusters are (or are not) successful. The following actions have been undertaken :

- An initial selection based on previous deliverables, especially in the internationalization strategy and the desk research about existing initiatives in other sectors. This information was contrasted with different documents of the European Cluster Excellence Initiative, as Gold label criteria and Minimum requirements for Cluster Organisations, and the Smart Guide to Cluster Policy, produced by the Clusters, Social Economy and Entrepreneurship unit of the European Commission.
- An interactive workshop to discuss the proposal list, with the aim of selecting the best practices and the most suitable ones for the project.
- Gathering, classification and selection of the practices in order to feed the roadmap.

The best practices have been divided into:

- Internal success factors: including practices related to structure and management.
- External success factors: collecting operational and technical practices.

Nevertheless, the FoodNet meta-cluster will have to determine if they take all these factors into account for their future work. This list aims at being as complete as possible so that the FoodNet meta-cluster can select the best practices that match its situation in the best way possible

Internal success factors

Structure :

- Registration as an association according to one of the clusters national law, as an advantage to get national funds.
- Recognition as an EU associative legal form to get European funds and participate in bigger projects.
- Full-time personnel in charge of the project, representing all the clusters.
- Partial-time personnel in each cluster member or specific clusters.

- Qualified export team (inside meta-cluster or outsourced team) to offer a high-quality service in internationalisation.
- Multidisciplinary and multilingual team experienced in EU and cluster management as Manager or Coordinators of the project.
- One single cluster as coordinator of the whole meta-cluster.
- Several founding members as coordinators of the meta-cluster.
- Creation of a Body of Directors, to involve SMEs managers can be considered.
- Governance: define the contact between the Management team and the meta-cluster participants - specific projects, working groups, other joint activities.

Financing :

- Mainly through public support (regional, national, European funds).
- Mainly through the development of income-generating activities that ensure the viability of the project.
- Mainly through private money (membership fees, sponsorship, aids, donations).
- Project-oriented funding approach : determines project duration and administrative funding.
- Entrance, membership and services fee must be defined.
- Non-payment penalties or not.
- A secure financial situation with diversified sources for financial income allows a concentration of the core work of managing the cluster and its activities.
- Administration of funds must be subject of the corresponding intervention and publicity, so that the members can have periodic knowledge of the destiny of the same ones. The income and expenditure account shall be drawn up annually by the Steering Committee.
- Clearly define which entity is going to be responsible of the administration of funds. In the case of the FoodNet meta-cluster, it should be the Steering Committee to ensure an equal representation of every founding member.
- Clearly define which entity is going to be responsible of fundraising.

Members :

- Specific and clearly defined criteria to new members admission (strategically selected for the alignment of the consortium strategies).
- Commitment and involvement of its member (participation, engagement, economic and material resources...) – express in a written form, with clear obligations and rights for each part.
- Involvement of Research institutes and technological centres to enlarge cluster's legitimacy – at least as non-committed participants with regular participation in events but not active contribution.
- Involvement of different business networks – trying to add them as committed participants to the network.
- Involvement of long term experienced clusters through collaborations (know-how).
- Involvement of regional/national agencies in charge of internationalisation support (as Chambers of Commerce).

- Involvement of third countries target markets companies and clusters, to facilitate internationalisation. Having some kind of personal connection or relationship makes contact with stakeholders easier.

External success factors

Strategy :

- Clearly defined goal of the partnership - common and greater than the ones of the clusters separately.
- Clearly defined scope of work and sector (business segment approach).
- Wide area of work covering different sectors – diversified network (whole sector approach).
- Political and economic scenarios should be considered to be effective.
- Working method through letters of intent - participation of each member in specific groups to solve particular challenges.
- Working method through working groups - temporary project consortia or bi- or multilateral ad-hoc partnership.
- Implication of SMEs to adapt the strategy to their real needs.
- Lobbying government administrations – close contacts with authorities and administrations.
- Press release and communication tools for disseminate results.
- Instead of trying the establishment of new international relations, clusters should seek to build on existing ones. SMEs are often only prepared to spend money for internationalisation when the business opportunity is almost guaranteed but it is difficult to convince them to participate in missions or other activities with a explorative character.
- Focus on not more than three target territories.
- Target countries chosen should be led by a partner in the meta-cluster with high experience on it. This will allow the meta-cluster to save time and get the involvement of SMEs easier, and therefore their loyalty and trust in the project.
- International cooperation with other clusters initiatives, as a door opener for international contact and transnational collaboration.
- Cross-sectorial and intercluster collaboration.
- Roadmap development per periods. Joint strategic vision and common goals. Implementation plan with measurable targets and dedicated budgets.
- Communication platform for the exchange of information and integration of activities – establishing a common inter-cluster information/data set.
- Interaction between academic (science) and professional (business) areas.

Services :

- Specialisation in concrete services not offered by other organisations.
- Offer very concrete services and limited: for example, annual event to present results, trainings.
- Wide range of services and development of them on demand.
- Smart specialization strategy : focus in R&D and technological activities – investment shortage by SMEs.

- Specialisation in sustainable logistics solutions – according to European politics.
- High-quality training courses (offered by professionals in the topic). Meta-cluster as training entity.

One last aspect to consider is the risk assessment. As all FoodNet activities will rely on the involvement of partners that are willingly linked without any form of hierarchy, it is of crucial importance that the risk should be considered.

To manage potential risks, the following measures will be taken :

- Through its Steering Committee, the meta-cluster will appoint one member responsible for each action and / or activity,
- Each appointed member will need to confirm in written that it has the sufficient capacity at his disposal to manage the activity (an email can be considered as sufficient to avoid too much formalism and red tape),
- During each quarterly meeting of the Steering Committee, each task is reviewed and each appointed member is requested to make a statement about the progress of the activity,
- If the appointed member faces difficulties in the execution of the task, it is requested to inform as soon as possible the Steering Committee,
- The Steering Committee can organise an additional session in order to address the issue and to bring help to the member in difficulties. The SC can also decide to reshuffle the distribution of tasks to ensure a seamless execution of the action plan.