

# Call Guidelines

Business Plan 2023 – 2025

Call 2025 for Regional Innovation  
Scheme (RIS) proposals

EIT Manufacturing

Paris | 2024

[eitmanufacturing.eu](https://eitmanufacturing.eu)

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## History of changes

Version	Publication date	Changes
1.0	22/04/2024	Draft version
1.1	30/04/2024	Final version
1.2	21/06/2024	Updated 3.9 and 5.4

## Abbreviations

BP	Business Plan
IC	Impact Centre (previously known as CLC)
EC	European Commission
ESR	Evaluation Summary Report
EU	European Union
FSM	Financial Sustainability Mechanism
IER	Individual Evaluation Report
KIC	Knowledge and Innovation Community
KPIs	Key Performance Indicators
MGA	Model Grant Agreement
MT	Management Team
PMO	Programme Management Office
RIS	Regional Innovation Scheme
SO	Strategic Objectives

## Keywords

<b>Activity</b>	Everything that EIT Manufacturing does is organized into Activities. Each Activity belongs to one Segment, and each Segment to one Area. Each Activity should contribute to the integration of the knowledge triangle of innovation, education, and business creation.
<b>Activity Leader</b>	The Activity Leader is the person nominated for each activity as the main contact point between the entities involved in the activity and EIT Manufacturing. This person is affiliated with the Lead Partner of the activity. The Activity Leader can nominate or revoke an unlimited number of contacts from the entities involved in the activity.
<b>Area</b>	EIT defines several areas in which it operates: Education; Innovation and Research; Entrepreneurship; Communication, Dissemination, and Outreach; Regional Innovation Scheme; and Management and Coordination.
<b>Business Plan</b>	The document specifies the detailed plan of EIT Manufacturing for the upcoming years. Based on the draft Business Plan submitted in September (and some other criteria) EIT decides on the budget available to EIT Manufacturing in the following years. The Business Plan will then be adjusted to match the assigned budget and forms the basis for the internal activity agreements of EIT Manufacturing with its partners.
<b>Services Agreement</b>	Previously “Financial Sustainability <sup>1</sup> Agreement”. The Agreement which is signed with the aim of contributing to the Financial Sustainability of the KIC EIT Manufacturing and its community.
<b>Call for Proposals</b>	The call is the instrument used to allocate grant funding by EIT Manufacturing to consortia of organizations, individuals, or third parties to support the deployment and development of the Strategic Agenda through activities. EIT Manufacturing uses two types of calls: (1) general call aligned with the corresponding Business Plan (BP). This type of call involves the different Thematic Areas of EIT Manufacturing (before the year of BP implementation), and (2) ad-hoc call, normally involving only one Thematic Area, which aims to complete or balance the portfolio outlined in the respective BP, through the allocation of the non-committed budget of the BP or the

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<sup>1</sup> Regulation (EU) 2021/819 of the European Parliament and of the Council of 20 May 2021 on the European Institute of Innovation and Technology (recast), Article 2 Definitions p. 16: ‘financial sustainability’ means a capacity of a KIC to finance its knowledge triangle activities independently of contributions from the EIT.

	allocation of additional funding not initially included in the respective BP (during the year of the BP implementation).
<b>Call Guidelines</b>	Document where any call for proposals' terms, conditions, and criteria are defined and stated according to the principles of transparency, equal treatment, open competition, and sound procedural management.
<b>Call Report</b>	Document summarising the results of the call and its most important outputs, including the ranking list.
<b>Deliverable</b>	Deliverables are documents encapsulating the outputs (e.g., building blocks of the proposal information or data mapping, a design report, a technical diagram, an infrastructure or component list, or a software release upon which the product/solution or service depends) that must be produced during the activity lifecycle.
<b>EIT Manufacturing partner</b>	A member of the EIT Manufacturing Association (Core or Associate Partner under the Article of Association conditions)
<b>Evaluation Process</b>	The process by which EIT Manufacturing examines the quality of a proposal to decide if it should receive EIT funding.
<b>Evaluation Panel</b>	Group of normally 3 evaluators + 1 rapporteur with specific expertise in a specific area/segment of the call, aiming to evaluate a set of eligible proposals submitted to a call.
<b>Evaluation results list</b>	List of proposals in order of scoring, based on the evaluation process results.
<b>Evaluation Summary Report</b>	Following the completion of the evaluation process, a final Evaluation Summary Report is made for each proposal, summarising the proposal's strengths, weaknesses, risks, and commercial and social value. It is an expert deliverable drafted by the rapporteur and presents the consensus on a specific proposal.
<b>Impact Centre</b>	Impact Centre/affiliate of EIT Manufacturing
<b>Individual Evaluation Report</b>	Applications to the calls are assessed individually by external expert evaluators according to the terms and criteria stated in the call for proposals text. Each evaluator issues individual reports for each eligible application.
<b>Key Marketable Innovation</b>	Key Marketable Innovation (KMI) is an innovative concept, product, or solution that has been identified and prioritized due to its high potential to be commercialized and generate revenue in the marketplace. KMIs typically offer unique features or benefits that differentiate them from existing solutions and address unmet needs or opportunities in the market. KMIs are innovations that have a high potential for commercialization, as they offer a valuable solution or

	improvement to a market need, and can generate significant economic value for the organization that develops and markets them.
<b>Key performance indicators (KPIs)</b>	<p>Set of indicators used to measure how effectively a consortium is meeting the objectives.</p> <p>There are 2 sets of KPIs: the EIT Core KPIs defined by the EIT that reflect the EIT operational objectives for education, entrepreneurship, and innovation, and the KIC specific KPIs defined by EIT Manufacturing that reflect the societal challenge that the KIC is addressing.</p> <p>KPIs need to be reported.</p>
<b>KIC</b>	“Knowledge and Innovation Community” – EIT Manufacturing is one of the 9 KICs that operate under the regulations of EIT.
<b>Milestone</b>	Control points to chart progress. They may correspond to the completion of a key deliverable that allows the next phase of work to begin.
<b>Model Grant Agreement</b>	Model Grant Agreement is used in the Horizon Europe programme financed by the European Commission.
<b>Panel consensus meeting</b>	All the written external evaluations are discussed in a consensus meeting where the points of scoring, convergence, and divergence are discussed and debated. The evaluation panel reviews all the individual evaluations made on submitted proposals and reaches a consensus about their scoring and ranking. The results of the panel consensus meeting are set out in the minutes and the call report.
<b>Pillar</b>	Used as a synonym for Area
<b>Ranking list</b>	Ranking of proposals selected for funding by the EIT Manufacturing Management Team.
<b>Rapporteur</b>	Member of the evaluation panel who facilitates the discussion during the consensus meeting by synthesizing the individual evaluations of the panel experts and writing the minutes and the evaluation summary report including the evaluation results for each proposal as per the conclusions of the panel.



# 1. Call summary

**Disclaimer:** The information given in this document is subject to revision, according to new potential rules or requirements provided by EIT and/or by the EC.

Call for Proposals main Features	
Dates <sup>2</sup>	<p><b>Call publication:</b> 22 April 2024</p> <p><b>Call opening:</b> 29 April 2024 at 10:00 CEST.</p> <p><b>Call closing:</b> 8 July 2024 at 17:00 CEST.</p> <p><b>Eligibility and admissibility check:</b> July 2024</p> <p><b>Evaluation of proposals:</b> July- October 2024</p> <p><b>Hearings:</b> October 2024</p> <p><b>Communication of results:</b> October 2024</p> <p><b>Stand-still period:</b> October- November 2024</p> <p><b>Start date of the projects:</b> January 2025</p>
Introduction	<p>Call for proposals for Regional Innovation Scheme (RIS) Activities to be executed in 2025 to enhance the innovation capacity of EIT RIS countries and regions. Topics addressed in the call are:</p> <ul style="list-style-type: none"> <li>• <b>Topic 1: RIS Innovation</b> <ul style="list-style-type: none"> <li>1.A Advanced materials and manufacturing processes at EIT RIS</li> <li>1.B Artificial Intelligence at EIT RIS</li> <li>1.C Inclusiveness at EIT RIS</li> </ul> </li> <li>• <b>Topic 2: Up-skilling and re-skilling manufacturing workforce in EIT RIS countries (RIS Education)</b></li> </ul>
Duration of the projects	<i>12 months</i>
The total budget allocated to this call	2M EUR

<sup>2</sup> 1 Please note that this calendar is indicative. Dates might be subject to slight changes.

<p>Links to the submission tool</p>	<ul style="list-style-type: none"> <li>• New Organization? – register <a href="#">here</a></li> <li>• New person?<sup>3</sup> - register <a href="#">here</a></li> <li>• Already registered? <a href="#">Log in to the submission system</a></li> </ul> <p><a href="#">Link to support form</a></p>
<p>List of documents to be submitted</p>	<ul style="list-style-type: none"> <li>• Application form to be completed on the submission tool.</li> <li>• Declaration of Honour duly signed by each member of the consortium.</li> <li>• <b>In addition, for Topic 1:</b> <ul style="list-style-type: none"> <li>○ Business Plan</li> <li>○ GANTT chart</li> </ul> </li> <li>• <b>In addition, for Topic 2:</b> <ul style="list-style-type: none"> <li>○ Business Owner Deck</li> <li>○ Instructional designer deck</li> </ul> </li> </ul>
<p>List of documents to take into consideration</p>	<ul style="list-style-type: none"> <li>• Horizon Europe Model Grant Agreement</li> <li>• EIT Manufacturing Strategic Agenda</li> <li>• Appeal and redress procedure</li> <li>• Eligibility of expenditures</li> <li>• List of KPIs</li> <li>• Financial Support Agreement, including annexes</li> <li>• Activities Monitoring Process Guidelines</li> <li>• Services Agreement</li> <li>• <b>In addition, for Topic 1:</b> <ul style="list-style-type: none"> <li>○ Expected information and evidence</li> </ul> </li> <li>• <b>In addition, for Topic 2:</b> <ul style="list-style-type: none"> <li>○ Digital Content Agreement</li> <li>○ Annex A – Basic Concepts and Glossary Education</li> <li>○ Annex B – EIT Manufacturing Upskilling and Reskilling Quality System and Competency Model – Manual</li> <li>○ EIT Label Handbook</li> </ul> </li> </ul>
<p>Evaluation criteria</p>	<p><i>Evaluation criteria assessed by the independent experts:</i></p> <ul style="list-style-type: none"> <li>• Excellence</li> <li>• Impact</li> </ul>

<sup>3</sup> It applies to new persons of already registered organizations

- |  |                                                                                                                                                     |
|--|-----------------------------------------------------------------------------------------------------------------------------------------------------|
|  | <ul style="list-style-type: none"><li>• Quality and efficiency of the implementation</li><li>• Strategic fit</li><li>• European dimension</li></ul> |
|--|-----------------------------------------------------------------------------------------------------------------------------------------------------|

## 2. General conditions

Proposals submitted to this Call must support EIT Manufacturing mission and directly contribute to tackling our strategic objectives. Proposals need to demonstrate how the proposal will actively contribute to the Strategic Agenda 2021-2027.

### 2.1 EIT Manufacturing mission and strategic objectives

#### Mission

EIT Manufacturing will put Europe at the centre of a global revolution and boost manufacturing innovation in Europe by connecting people with skills, technologies with markets, and innovators with investors. Technological progress is now exponential, and it is changing the industrial, social and competitive landscape faster than ever before. The aim of EIT Manufacturing is not only to adapt to this revolution but to lead it. To do so, EIT Manufacturing need to overcome value network fragmentation and bring stakeholders together, leverage knowledge and strengths to create value, and implement agile mechanisms to accelerate innovation. With the needs, concerns, and ideas of the economy and society at its core, the mission of EIT Manufacturing is to empower its partners and stakeholders to fundamentally transform the manufacturing system and meet the global demands for present and future generations.

#### Strategic objectives

EIT Manufacturing strategic objectives (SOs), as set out in the Strategic Agenda 2021-2027, which steer our activities and ambitions, and will help respond to major challenges shared by the manufacturing industry and society.

- Put people at the center of manufacturing.
- Accelerate green manufacturing.
- Foster sovereignty and competitiveness.

### 2.2 Knowledge triangle integration

EIT Manufacturing aims to promote solid consortia of European education, research, and business entities (the 3 sides of the Knowledge Triangle), either in the composition of the activities consortia or in the expected impact of the activities' results.

## 2.3 EIT Manufacturing membership

EIT Manufacturing is a KIC<sup>4</sup> of European Institute of Innovation & Technology (EIT).

All entities of selected proposals need to be part of the KIC EIT Manufacturing community and will have to choose one of the following partnership models (and related annual fee) before signing the relevant agreements (See section 5.4) and initiating their projects.

### Core partner (voting right, privileged access to services, representatives in the KIC governance)

- Large enterprises, research institutes, and universities 50,000 EUR
- Mid-sized companies (<2,000 FTE) 30,000 EUR
- SME (<250 FTE, turnover <50M EUR or balance sheet <43M EUR) 15,000 EUR

### Associated partner (no voting right, restricted access to services)

- Large enterprises, research institutes, and universities 35,000 EUR
- Mid-sized companies (<2,000 FTE) 20,000 EUR
- SME (<250 FTE, turnover <50M EUR or balance sheet <43M EUR) 10,000 EUR

Both Core and Associate Partners are membership categories of the EIT Manufacturing Association. Consequently, they are required to pay annual membership fees as determined by the EIT Manufacturing Partner Assembly. Membership fees are due every year irrespectively of whether a Partner receives funding for the relevant year. For the avoidance of any doubt, as an example, an entity which has zero funding but is participating in a funded project will still have to pay membership fees.

More information on the partnership models is available on the website<sup>5</sup>.

Please note that the total maximum EIT funding per year for all entities participating in the 2025 Calls is 1,500,000 EUR.

Under Horizon Europe, **Linked Third Parties/affiliated entities**<sup>6</sup> are eligible to participate in the proposal activities.

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<sup>4</sup> Regulation (EU) 2021/819 of the European Parliament and of the Council of 20 May 2021 on the European Institute of Innovation and Technology (recast), Article 2 Definitions p. 2: A large-scale Institutionalised European Partnership, as referred to in Regulation (EU) 2021/695, of higher education institutions, research organisations, companies and other stakeholders in the innovation process in the form of a strategic network, regardless of its legal form, based on joint mid- to long-term innovation planning to meet the EIT challenges and contribute to attaining the objectives established under Regulation (EU) 2021/695

<sup>5</sup> <https://www.eitmanufacturing.eu/partners/partnership-models/>

<sup>6</sup> Linked Third Parties, called Affiliated Entities under Horizon Europe, are either:

- entities that together legally conform to the sole beneficiary (i.e. partner). Ex: Entities A and B form entity C. All three entities (A, B and C) are Affiliated Entities
- or eligible entities that have a legal or capital link to the beneficiary that is neither limited to the action nor established for the sole purpose of its implementation.

At most, the following number of Linked Third Parties/affiliated entities of a Core Partner may receive funding per year through the 2025 Calls:

- Partners being large enterprises, research institutes and universities: 5
- Partners being mid-sized companies: 2
- Partners being SMEs: 1

If an affiliated entity is involved in a proposal, it means that:

- the affiliated entity carrying out the work shall be included in the proposal as participant (not the Core Partner)
- according to the Financial Support Agreement, the Core Partner receives the EIT funding for the work to be carried out by the affiliated entity then disburses the appropriate amounts to the affiliated entity based on their internal agreements. The core partner is responsible for ensuring that the funds are used for the purposes outlined in the proposal and in accordance with the Financial Support Agreement.

**Please take this into account when creating the proposals.**

## 2.4 Gender equality and inclusiveness

As per Horizon Europe Regulation, legal entities from Member States and Associated Countries that are public bodies and public or private research organizations or higher education establishments must have a gender equality plan, covering the following minimum process-related requirements:

- publication: a formal document published on the institution's website and signed by the top management.
- dedicated resources: commitment of resources and expertise in gender equality to implement the plan.
- data collection and monitoring: sex/gender-disaggregated data on personnel (and students, for the establishments concerned) and annual reporting based on indicators.
- training: awareness-raising/training on gender equality and unconscious gender biases for staff and decision-makers.

Content-wise, it is recommended that the gender equality plan addresses the following areas, using concrete measures and targets:

- work-life balance and organizational culture.
- gender balance in leadership and decision-making.
- gender equality in recruitment and career progression.
- integration of the gender dimension into research and teaching content.
- measures against gender-based violence, including sexual harassment.

A self-declaration will be requested at the proposal stage and the gender equality document will be requested if the activity is funded. If all the above-mentioned mandatory requirements are met through another strategic document, such as a development plan or an inclusion or diversity strategy, it can be considered equivalent. This requirement does not apply to other categories of legal entities, such as private for-profit organisations, including SMEs, non-governmental, or civil society organisations.

Applicants must also take all measures to promote equal opportunities between men and women in implementing the proposal and, where applicable, in line with their gender equality plan. They must aim to achieve, to the possible extent, a gender balance at all levels of personnel assigned to the proposal, including at the supervisory and managerial levels.

## 2.5 EU taxonomy for sustainable activities

Proposals are expected to comply with the 'do no significant harm' principle as per Article 17 of Regulation (EU) No 2020/852 on the establishment of a framework to facilitate sustainable investment (i.e. so-called EU Taxonomy Regulation<sup>7</sup>).

## 2.6 Ethics

For all activities co-funded by the EU, the ethical dimension is an integral part of the work from beginning to end, and ethical compliance is seen as pivotal to achieving real excellence. When preparing a proposal, it is required to read through the EU Ethics Self-assessment guide to check the compliance of your activities.

In case ethical issues concern your proposal, you shall describe how you will address them.

## 2.7 Open science

Open science practices could be implemented as an integral part of the proposal. According to the Horizon Europe Programme Guide, Open science is an approach based on open cooperative work and systematic sharing of knowledge and tools as early and widely as possible in the process. Your proposal could be contributing to the **social sciences or/and the humanities dimension** of EIT Manufacturing. If you believe this dimension, as described in the Horizon Europe Programme Guide, is appropriate for your proposal please acknowledge it in the submission phase

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<sup>7</sup> <https://eur-lex.europa.eu/legal-content/EN/TXT/?uri=celex:32020R0852>

## 3. Call specific conditions

### 3.1 Call thematic and expected results

The EIT Manufacturing RIS aims at widening participation in the KIC's activities, as well as increasing the impact of EIT Manufacturing in EIT RIS countries. The EIT RIS has been designed as a two-way interaction scheme. By sharing its good practice related to Knowledge Triangle Integration and increasing its activities in EIT RIS eligible countries, EIT Manufacturing welcomes activities for further developing business skills, talent, cooperation opportunities in education, currently untapped entrepreneurial potential, accessing markets and business, customers for innovative ventures, innovation, knowledge, know-how and technology transfer possibilities, additional testbeds for applications of innovative solutions as well as supporting access to co-funding options provided by EU, regional and national support schemes.

Therefore, EIT Manufacturing RIS aims towards engaging local stakeholders — individuals (notably students, researchers, entrepreneurs) and entities (e.g. start-ups, scale-ups, universities, research labs, NGOs, regions and cities)—in EIT Manufacturing activities. The call for 2025 includes education and innovation RIS activities.

All RIS activities should receive broad publicity on local and regional levels by raising awareness of the brand of EIT Manufacturing and the KTI model, through the collaboration and interlinking of leading entities from higher education, research and business areas. Synergies with regional/national or Horizon Europe programmes are strongly recommended.

Proposals for EIT Manufacturing RIS activities need to demonstrate their contribution to enhancing the innovation capacity of EIT RIS countries and regions. For example, by:

- i. Having enhanced participation of organisations from EIT RIS countries;
- ii. Involving relevant stakeholders from EIT RIS countries in EIT Manufacturing activities;
- iii. Executing pilot implementations and demonstrators in EIT RIS countries;
- iv. Having enhanced, specific impact to EIT RIS countries;
- v. Deploying activities in EIT RIS countries and regions where EIT Manufacturing has limited or no presence yet.



### 3.1.1 Topic 1: RIS Innovation

Three (3) technical subtopics are considered under Topic 1.

#### A. Advanced materials and manufacturing processes at EIT RIS

##### Purpose

The subtopic 1.A calls for projects aiming to support innovative solutions relevant to the Call Thematic “Advanced materials at EIT RIS”, with a special focus on its impact in the manufacturing industry.

##### Topic description

Advanced materials are a key enabler technology for the twin green and digital transition and strategic point towards industrial competitiveness and leadership<sup>8</sup>. Boosting innovation and contribution of the EIT RIS countries and regions in advanced materials and novel manufacturing processes is a strategical need to ensure achieving the desired EU’s resilience and open strategic autonomy.

Advanced materials are those designed and engineered to display superior performance or special functions<sup>9</sup>. These and novel manufacturing process act nowadays as a trigger for the advancement of clean technologies. Some technical challenges and topics to be considered for proposals under this subtopic are processing of advanced materials, novel application of advanced materials in the manufacturing industry, new manufacturing techniques, processes and automation, advanced materials for twin green and digital transition, advanced materials for circular economy, advanced materials for clean tech innovations, advanced materials for clean energies, advanced materials for the next generation of semiconductors, advanced materials in biomanufacturing, advanced materials for space applications, advanced materials for zero-emission.

Some examples of these technologies are:

- Advanced materials: composites, nanomaterials, smart materials, metamaterials, bio-inspired materials, high-performance polymers, next-generation ceramics, materials increasing circularity and improved environmental performance, etc.
- Advanced manufacturing processing technologies: additive manufacturing, advanced machining/high precision machining, digital twins/replication of physical assets and behaviour of materials, biomanufacturing, zero-defects, etc.

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<sup>8</sup> [https://ec.europa.eu/commission/presscorner/detail/en/ip\\_24\\_1121](https://ec.europa.eu/commission/presscorner/detail/en/ip_24_1121)

<sup>9</sup> [https://one.oecd.org/document/ENV/CBC/MONO\(2022\)29/en/pdf](https://one.oecd.org/document/ENV/CBC/MONO(2022)29/en/pdf)

- Applications/sectors: aerospace (lightweight materials), automotive (carbon fiber composites), electronics (nanomaterials), sensors, chips production, semiconductors, energy storage and increased energy efficiency, conversion and generation of renewable and low carbon energy, healthcare etc.
- Challenges: cost, scaling up, regulatory barriers for safety and environmental impact, interdisciplinary collaboration (engineering, chemistry, computer science, etc.)

## B. Artificial Intelligence at EIT RIS

### Purpose

The subtopic 1.B calls for projects aiming to support innovative solutions relevant to the Call Thematic “AI and digital twins for manufacturing systems”, with special focus -although not restricted - on applying Artificial Intelligence in manufacturing.

### Topic description

Artificial Intelligence is an emerging and, in some cases, greenfield opportunity and the activities here aim to support stakeholders in EIT RIS countries to enhance their innovation capacity.

As AI technologies continue to advance, manufacturers can expect further improvements in productivity, quality, and competitiveness. Some technical challenges and topics to be considered for projects under this segment are digital twins for virtual commissioning, AI for predictive maintenance and production optimization, forecast the demand for products and pricing, machine learning & machine vision, data security and analytics, focusing on applications such as quality control, management, monitoring, customer care, personalization and maintenance. Beyond the above, challenges such as data privacy, cybersecurity, and workforce upskilling are also relevant for this subtopic and can be considered as complementary for fully realizing the benefits of AI in manufacturing.

## C. Inclusiveness at EIT RIS

### Purpose

The subtopic 1.C calls for projects aiming to support innovative solutions relevant to the Call Thematic “Inclusiveness at EIT RIS”, with special focus - although not restricted - on innovation projects which boost inclusiveness in the manufacturing industry.

### Topic description

Inclusivity in the manufacturing industry is not only an ethical must but also trigger tangible benefits in terms of business performance and competitiveness. By prioritizing inclusivity and embracing diversity as a strength, manufacturing

companies can create a more innovative, resilient, and competitive workforce that reflects the diverse perspectives and talents of the global community. As an example, at the European level, about 50.8 % of persons with disabilities are employed compared to 75.0 % of persons without disabilities, a ratio which lowers in RIS countries compared to non-RIS countries. On the other hand, prioritizing a safe manufacturing industry will minimize incidents, protect the health and welfare of the manufacturing workforce, and lead responsible and adequate execution of projects.

The proposal should focus on new innovative solutions to increase the inclusion of individuals and boost diversity in the manufacturing industry. Among others, technological aids such as sensorial, physical and cognitive, in the form of worker assistance systems can make jobs in the manufacturing sector accessible for people with disabilities, health impediments or cognitive or physical difficulties.

The solutions will contribute to:

- Create safer, more accessible, and inclusive work environment that increase employees' well-being.
- Increase well-being at the manufacturing workplace while supporting the retention of workers with disabilities in their jobs.
- Improve interaction capability of people with disabilities and facilitate social innovation.

Proposals with innovative solutions that will contribute to a more inclusive manufacturing industry in terms of social and gender diversity are also welcome.

### Expected outcomes & impacts

Proposals under **Topic 1** should identify who will be the potential customers and the actual market needs. Applicants should identify which local/regional parameters they expect to address with their innovative solutions, as well as the industrial sectors that will be addressed. The economic, environmental and societal impact of the relevant activities in EIT RIS area should be clearly identified.

Proposals submitted **under Topic 1** are expected to contribute to the RIS objective of increasing the innovative capacity of countries and regions in Europe where the pace of innovation is modest or moderate. The activities outcome and impact should address some of all of the following RIS-related aspects:

- The proposed activity is going to engage in its activities a significant number of partners and/or activity partners from RIS countries.
- There is a clear benefit for stakeholders in RIS countries and/or regions.
- The activity will strongly contribute to the advancement of the innovation performance of RIS countries.

- The activity includes appropriate communication measures to increase the impact of the activity and brand recognition of EIT, EIT RIS and EIT Manufacturing.

Proposals should also demonstrate that the activity will contribute to one or more of the following expected outcomes (aligned with EIT Manufacturing Strategic Objectives):

- Enhanced work environment to make manufacturing jobs more attractive, safe, and inclusive, supporting EIT Manufacturing Strategic Objective “Put people at the center of manufacturing innovation”.
- Improve resource efficiency to start a shift towards zero-waste processes, supporting the EIT Manufacturing Strategic Objective “Accelerate green manufacturing”.
- Decarbonization initiatives, setting the foundation for net-zero carbon manufacturing, supporting the EIT Manufacturing Strategic Objective “Accelerate green manufacturing”.
- Digital transformation for enhanced decision-making and operational efficiency, supporting EIT Manufacturing Strategic Objective “Foster sovereignty and competitiveness”.

Proposals should set out a credible pathway for the activity to contribute to one or more of the following expected impacts:

- Establishing Europe as a global exemplar in circular manufacturing processes, significantly contributing to environmental sustainability and resource efficiency. Leading to some specific KPIs as, increment in % circular material use rate and , reduction of GHG emissions.
- European manufacturers possess unmatched flexibility to adapt to market changes and safeguard data sovereignty, leveraging advanced digital technologies. Leading to some specific KPIs as revenue growth in manufacturing industry.
- Strengthened collaboration within the European manufacturing ecosystem, especially with RIS countries, enhancing overall resilience and innovation capacity. Leading to some specific KPIs new jobs created.

### 3.1.2 Topic 2: Up-skilling and re-skilling manufacturing workforce in EIT RIS countries (RIS Education)

#### Purpose

Upskilling and reskilling the workforce in manufacturing is essential to meet the demands of evolving technologies, changing market dynamics, and emerging industry trends. By prioritizing upskilling and reskilling initiatives, manufacturing companies can empower their workforce to adapt to changing industry demands, seize new opportunities, and drive business growth in a rapidly evolving landscape. **Topic 2** calls for proposals to up-skill and re-skill the workforce and cultivate a culture of innovation and entrepreneurship in the manufacturing sector in EIT RIS countries.

#### Topic description

Proposals should concentrate on providing EIT Regions with the tools, knowledge, and skills necessary to play a key role in the transition towards an innovative, digital, green, inclusive manufacturing that will keep Europe at the forefront of global manufacturing.

The proposals under this topic are expected to cover skills and competencies in the following areas in the manufacturing sector, including but not restricted to: advanced materials implementation, circular economy implementation, green social and financial sustainability implementation, AI and Data Analytics in Manufacturing, digital and twin transition, certifications/tailor-made training courses considering the needs of a sector, coaching, mentoring, and professional development opportunities.

Some examples of target audience for these trainings could include – but not restrictive to: C-level executives in the manufacturing industry, strategic managers or managers of the related technical areas, shop floor workers and technicians working in the workshop, **quality control and assurance personnel, maintenance and engineering staff, human resources, and training specialists**

The proposals should meet the requirements deploy in “Learning programmes requirements”. Each training learning program should incorporate innovation and entrepreneurship competencies. Moreover training, and the initiatives programs should encourage participants to think creatively and critically about sustainability challenges, fostering a culture of innovation within manufacturing organizations. Entrepreneurial skills such as business model development, market analysis, and strategic planning should be integrated into training programs to equip participants with the tools and mindset necessary to drive sustainable innovation and business growth.

Proposals are expected to show that they are well aware of specific requirements and challenges in RIS countries and clearly demonstrate the capability to reach a large

number of relevant stakeholders in RIS countries. In addition, proposals should demonstrate and justify the market needs.

### Expected outcomes & impacts

Proposals submitted **under Topic 2** are expected to contribute to the RIS objective of increasing the innovative capacity of countries and regions in Europe where the pace of innovation is modest or moderate. The activities outcome and impact should address some of all of the following RIS-related aspects:

- The proposed activity is going to engage in its activities a significant number of partners and/or activity partners from RIS countries (minimum 3).
- There is a clear benefit for stakeholders in RIS countries and/or regions.
- The activity will strongly contribute to the advancement of the innovation performance of RIS countries.
- The activity includes appropriate communication measures to increase the impact of the activity and brand recognition of EIT, EIT RIS and EIT Manufacturing.

Proposals should also contribute to one or more of the following expected outcomes:

- Improve operational efficiency facilitated by advanced digital technology competencies and capacity for strategic planning and implementation of digital innovations such as Artificial Intelligence.
- Promote and foster of high-value jobs and workforce capable of driving entrepreneurial ventures and innovation within the manufacturing industry.
- Increase proficiency in environmental sustainability methodologies to apply existing standards and best practices for the manufacturing industry for compliance with EC/national/regional regulations and directives.

Proposals under this topic should set out a credible pathway for the activity to contribute to one or more of the following expected impacts:

- Accelerate digital adoption across the manufacturing sector, enhancing competitiveness through improved efficiency and innovation.
- Improvement of manufacturing companies and their workforce in RIS countries ensuring adaptability to technological changes, employee engagement and talent retention and company competitive advantage.
- Increment of upskilled employees working in the manufacturing sector.
- Long-term industry transformation, with manufacturers developing new business models and revenue streams based on where continuous innovation, adaptability, and entrepreneurial thinking are the norm.
- Development of a holistic sustainability view and correct application and use of sustainability methodologies to apply existing standards and best practices

for the manufacturing industry for compliance with EC/national/regional regulations and directives.

## Learning Program Requirements

This call aims to provide support to consortia in developing and implementing new lifelong learning programs designed to enhance upskilling and reskilling within the manufacturing industry, with a specific focus on the themes outlined in Chapter 3.1.2. This chapter details the prerequisites for these learning programs.

### Learning programmes

The primary focus should be on crafting and delivering dynamic learning experiences tailored to cultivate targeted skill sets. Various teaching and learning methodologies may be employed based on the specific needs of the target audience and the subject matter. The rationale behind the chosen training methods must be thoroughly justified in the proposal submission.

Each consortium will be required to develop modular learning programmes that can be adapted to the needs of the learners and companies. However, depending on the target group and typology of training the following minimum requirements should be taken into account:

Fully asynchronous training (digital training) - targeting engineers, managers, decision makers and executives:

- Minimum Hours of Training: 14 hours of trainings
- Total Duration: Asynchronous courses should be flexible but should be designed to be completed within 4 to 12 weeks to maintain learner engagement.
- Module<sup>8</sup> Duration: In case of digital learning, the modules are comparable to learning paths (see annex A). Each module should not exceed 2 hours while the individual units (nuggets) inside of it should not exceed a duration of 15 minutes. If a topic requires more time, it should be broken down into smaller, manageable segments.

Fully synchronous training (on-site or virtual training) – targeting engineers, managers, decision makers and executives:

- Minimum Hours of Training: 16 hours of synchronous training.
- Module Duration: Each module should not exceed 2 hours. If a topic requires more time, it should be broken down into smaller, manageable segments.
- Modularity should enable the reorganization and selection of the modules according to the specific company or target group needs.

Fully synchronous training (on-site) – targeting production line and shop floor workers:

- Minimum Hours of Training: 10 hours, focused on hands-on, practical training that can be immediately applicable on the shop floor.
- Module Duration: Each module should not exceed 2 hours. If a topic requires more time, it should be broken down into smaller, manageable segments. Modularity should enable the reorganization and selection of the modules according to the specific company or target group needs. It is recommended that daily duration doesn't exceed 4 hours per day.

Fully synchronous training (on-site) – targeting SMEs:

- Minimum Hours of training: 8 hours, focused on hands-on, practical training that can be immediately applicable on the shop floor.
- Total Duration: short and intensive courses that can be completed in 1-2 days.
- Module Duration: Each module should not exceed 2 hours. If a topic requires more time, it should be broken down into smaller, manageable segments. Modularity should enable the reorganization and selection of the modules according to the specific company or target group needs.

Hybrid training (combination of asynchronous and synchronous training) - targeting engineers, managers, decision makers and executives:

- Minimum Hours of Training: 10 hours of asynchronous training and 8 hours of synchronous instruction.
- Module Duration: Each module should not exceed 2 hours. If a topic requires more time, it should be broken down into smaller, manageable segments. Modularity should enable the reorganization and selection of the modules according to the specific company or target group needs.

### **Target group**

The intended audience for this call is the European manufacturing workforce, spanning from shop floor workers to C-level executives.

However, it is imperative that each proposal distinctly identifies a specific target group within this spectrum. Proposals should demonstrate that the learning program will effectively meet the unique upskilling and reskilling needs of the chosen demographic, while also addressing any potential barriers to their learning.

### **Methodologies**

Innovative teaching and learning approaches, such as digital learning, immersive experiences, simulations, case studies, challenge-based learning, seminars, and gamification, should be embraced. Practical application and project-based learning



should be prioritized to furnish participants with hands-on experience in applying acquired skills and competencies within real-world manufacturing settings.

### **EIT Manufacturing non-Degree Label Programme**

The resultant learning programs must align with the standards outlined in the EIT Manufacturing Upskilling and Reskilling Quality System and Competency Model, as detailed in the Manual (Annex B), adhering to the EIT Label Handbook. A coherent set of courses or modules should be formulated to qualify for inclusion in the EITM Non-Degree Label Programme, thereby achieving the associated KPIs: EITHE07.1 and EITHE07.2.

In line with the EITM non-degree label, the learning program should seamlessly integrate innovation and entrepreneurial competencies, correlating them with relevant enabling technologies, manufacturing applications, and potentially, business models.

All learning programs will undergo quality checks by EIT Manufacturing to ensure excellence and high standards.

### **Requirements:**

The learning programs should adopt a pan-European approach, with English being the preferred language. However, for local sessions, training can be conducted in the local language. Digital learning content must be initially developed in English, although translating the content into multiple languages will be viewed favourably. Utilizing available AI technologies for translation is encouraged, but it's imperative for consortium partners to ensure the quality of translations. It should be noted that translated content will not be considered for KPI purposes (specifically KIC.G03 Number of nuggets created and KIC.G05 Number of learning paths created).

Results must not be subject to non-commercial licenses such as those modified under Creative Commons License CC BY-NC, CC BY-NC-SA. Additionally, accessibility of software and hardware for learning purposes should be prioritized through open-access options or affordable pricing.

Moreover, proposals must:

- Clearly define target groups, entry-level competencies, learning outcomes, and methods for assessing acquired competencies.
- Demonstrate how novel teaching, learning, and upskilling methodologies contribute to the current state of the field, supported by market analysis.
- Outline plans for program delivery and collection of learner feedback through EITM surveys.

- Ensure widespread dissemination and scale up of the training beyond the pilot phase, with courses designed to be transferable and adaptable for potential commercialization.
- If digital training is being developed, ensure that the content will be both created and distributed on the EITM digital learning platform, adhering to EIT Manufacturing's guidelines for digital learning creation. It is advisable to design the digital training so that it can be easily consumed as a stand-alone resource.
- If relevant, commit to and accept the signing of the Digital Content Agreement.
- Engage an instructional designer (ID) throughout the training material development, with their profile and track record clearly outlined in the submission form (see “Instructional Designer Deck”).
- Include a train-the-trainer program as an output. It is highly recommended that the train-the-trainer program is developed as a learning path in EIT Manufacturing digital learning platform.
- Include dissemination and communication materials (logo, flyer, factsheet, and video footage) as outputs.

### 3.2 Duration and Technology Readiness Level<sup>10</sup>

The call is open to proposals of projects with **duration of 12 months** (applies to both Topic 1 and Topic 2).

For **Topic 1 (RIS Innovation)**, consortium must propose an innovation with a **TRL of at least 7** at the start of the project. The “demonstration in an operational environment” has to be proved in the “Business Plan” attachment. Solutions are expected to **achieve TRL 8 or higher** by the end of the activity. The business owner’s involvement and effort in the definition and execution of the commercialisation plan, which is expected to start from activity kick-off, should be described in the workplan.

Some examples of potential outcomes on a RIS Innovation activity are: 1) software tools and applications, including but not restricted to tailored made solutions, platforms, middleware, apps, etc., 2) hardware tools, including but not restricted to embedded systems, electronics, industrial equipment etc., 3) services, following the idea of Software as a service (SaaS) or Manufacturing as a service (Maas), including but not restricted consulting on technical topics, training and education for the activity main technologies etc, 4) new technologies or technological products result of application of novel materials with enhanced efficiency.

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<sup>10</sup> [https://ec.europa.eu/research/participants/data/ref/h2020/wp/2014\\_2015/annexes/h2020-wp1415-annex-g-trl\\_en.pdf](https://ec.europa.eu/research/participants/data/ref/h2020/wp/2014_2015/annexes/h2020-wp1415-annex-g-trl_en.pdf)

### 3.3 Applicants profile

#### Entities eligible to participate.<sup>11</sup>

Any legal entity, regardless of its place of establishment, including legal entities from non-associated third countries or international organisations is eligible to participate (whether it is eligible for funding or not), provided that the conditions laid down in the Horizon Europe Regulation.<sup>12</sup> have been met, along with any other conditions laid down in the specific call topic.

A 'legal entity' means any legal person created and recognised as such under national law, EU law, or international law, which has legal personality, and which may, acting in its name, exercise rights and be subject to obligations.

#### Entities eligible for funding

To be eligible for funding, applicants must be established in one of the following countries at the time of proposal submission:

1. the Member States of the European Union, including their outermost regions:  
Austria, Belgium, Bulgaria, Croatia, Cyprus, Czechia, Denmark, Estonia, Finland, France, Germany, Greece, Hungary, Ireland, Italy, Latvia, Lithuania, Luxembourg, Malta, Netherlands, Poland, Portugal, Romania, Slovakia, Slovenia, Spain, Sweden.
2. the Overseas Countries and Territories (OCTs) linked to the Member States.
3. the countries associated with Horizon Europe and the low- and middle-income countries.<sup>13</sup>

Entities established in Switzerland are eligible to participate but at their own cost. Although they won't receive EIT funding, Swiss entities, including companies and SMEs, may receive funding from Swiss authorities. Please refer to the information available [here](#) for details.

**While all EIT Manufacturing partners are eligible to apply for funding, applicants do not need to be EIT Manufacturing partners at the submission stage. Successful applicants will be required to join the community and select a membership category from chapter 2.4 when initiating their projects.**

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<sup>11</sup> Based on the Council Implementing Decision (EU) 2022/2506) on measures for the protection of the Union budget against breaches of the principles of the rule of law in Hungary, effective as of 16th December 2022, ***no legal commitments shall be entered into with any public interest trust established on the basis of the Hungarian Act IX of 2021 or any entity maintained by such a public interest trust.***

<sup>12</sup> Regulation (EU) 2021/695 of the European Parliament and of the Council of 28 April 2021 establishing Horizon Europe (OJ L 170 , 12.5.2021, p. 1)

<sup>13</sup> See the Horizon Europe List of Participating Countries on the Portal for an up-to-date list of these countries [https://ec.europa.eu/info/funding-tenders/opportunities/docs/2021-2027/common/guidance/list-3rd-country-participation\\_horizon- Euratom\\_en.pdf](https://ec.europa.eu/info/funding-tenders/opportunities/docs/2021-2027/common/guidance/list-3rd-country-participation_horizon- Euratom_en.pdf)

## Consortium composition

Only legal entities forming a consortium are eligible to participate. The consortium must include **at least 3 legal entities independent from each other**<sup>14</sup> as follows:

- **at least 2 different RIS countries**<sup>15</sup> should be covered by the consortium (legal establishment of the organizations).
- **consortium shall include entities geographically based in countries covered by at least two different EIT Manufacturing ICs**<sup>16</sup>.
- **assign the “Business Owner” and “End-User” (Topic 1)/ “Manufacturing Company” (Topic 2) roles to a legal entity established in an EIT RIS country (see below).**

Please note: Since EIT Manufacturing has ICs in Greece, Italy and Spain, indicating possible good presence, it is strongly recommended in this case to have a strong participation and/or focus on a good number of other EIT RIS-eligible countries and avoid having activities dedicated solely on Greece, Italy and Spain.

The participants in each consortium must cover, at least, the following roles:

- **Lead Partner.** The organisation in charge of coordinating the consortium through the Activity Leader. The Activity Leader will be the direct contact for EIT Manufacturing and is responsible for the coordination of the consortium, including the implementation of the workplan, the execution of the budget, the submission of the deliverables, the risk management and mitigation and the impact achievements of the overall activity. The role of Activity Leader is open to any entity participating to the call for proposals.
- **Business Owner.** The organisation in charge of the commercialisation of the key marketable innovation(s)/ learning programmes resulting from the project with a legal entity established in a Member State or Horizon Europe Associated Country. The Business Owner will be the direct contact for EIT Manufacturing and the consortium for the Services Agreement and responsible for the commercialisation plan and its execution. A suitable Business Owner is a for-profit organisation, with a track record in creating new businesses, and in building marketing and commercialisation strategies in the relevant Topic. The organisation has a deep understanding of the identified market, its competitors, and barriers to entry, and most importantly a proven track record of sales and

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<sup>14</sup> Two legal entities shall be regarded as independent of each other where neither is under the direct or indirect control of the other or under the same direct or indirect control as the other. Please refer to the entire definition in Article 8: [https://ec.europa.eu/research/participants/data/ref/h2020/legal\\_basis/rules\\_participation/h2020-rules-participation\\_en.pdf](https://ec.europa.eu/research/participants/data/ref/h2020/legal_basis/rules_participation/h2020-rules-participation_en.pdf)

<sup>15</sup> <https://eit.europa.eu/activities/eit-regional-innovation-scheme-ris-closing-innovation-divide-europe>

<sup>16</sup> <https://www.eitmanufacturing.eu/in-your-country/>

customers in the target group sector identified by the consortium. All these elements should be clearly described in the proposal (see “Business Plan” template also for Topic 1 and “Commercialization Plan” for Topic 2). More than 1 Business Owner can be proposed. **The business owner(s) should come from a EIT RIS eligible country for the RIS Call for Proposals.**

In addition, specific and needed **only for Topic 1**:

- **End-Users.** At least 1 different organisations that will deploy the key marketable innovation(s) in their production facilities to fulfil a specific need or achieve a business objective in a real-world industrial environment. The end-users must be consumers of the key marketable innovation(s) and each of them must provide at least 1 use case, testing and implementing the innovation(s) in their real industrial environment. **The end user(s) should come from a EIT RIS eligible country for the RIS Call for Proposals.**

In addition, specific and needed **only for Topic 2**:

- **Manufacturing Company.** At least 1 manufacturing company that will not only consume the learning programmes but support in definition and identification of the skills’ development needs. The involvement of SMEs is highly encouraged. **The Manufacturing Company(ies) should come from EIT RIS eligible country for the RIS Call for Proposals.**

Additional roles, in particular to foster knowledge triangle integration, are considered a plus.

As stated before, proposals for EIT Manufacturing RIS activities need to demonstrate their contribution to enhancing the innovation capacity of EIT RIS countries and regions. **EIT RIS eligible countries can be found [here](#).**

### **3.4 Key Performance Indicators (KPIs)**

Please note that proposals must not include any other KPIs than the ones listed in this chapter. Please, note that once the KPI value is proposed it will not be possible to amend it; it will remain as is for the target to be achieved by the end of the activity. Please note that EIT Manufacturing or external evaluators might ask to increase the targets before accepting the proposal for funding.

### 3.4.1 Topic 1

Every proposal has to contribute at least to the EITHE02.4 KPI.

Proposing a higher target than the minimum required, but still credible and justified, will be positively evaluated. Consider that e.g., a target of 2 for EITHE02.4 means that 2 different innovative solutions will be sold.

Please, note that once the KPI value is submitted it will not be possible to amend it (only increase of the value possible); it will remain as is for the target to be achieved by the end of the activity.

KPI	Short title	Minimum Target
EITHE02.4	Number of innovations introduced on the market during the KAVA duration or within 6 months after completion with a sales revenue of at least 10 000 EUR documented	1
EITHE02.2-EITRIS	EIT RIS Marketed Innovations. Related to KPI 2.4 met by an entity belonging to a EIT RIS country.	1

Additionally, every proposal could optionally contribute to one or more KPIs listed below:

KPI	Short title	Min. Target
EITHE01.1	Number of innovative products, processes and methods & Intellectual Property Rights (IPR) applications	-
EITHE2.1	Number of all innovations introduced on the market during the KAVA duration or within 6 months after completion.	1
EITHE2.3-EITRIS	Number of EIT RIS countries related to the products introduced on the market (as per EITHE02.1 definition).	1
EITHE03.1	Number of start-ups and scale-ups supported by KICs for at least 2 months in year N, provided the KIC's services contribute to the company's growth.	1
EITHE04.1	Number of start-ups established in year N as a result / based on the output(s) of KAVA(s)	1
EITHE04.2-EITRIS	Number of start-ups registered in EIT RIS country in year N and established as a result/ based on the output(s) of Innovation/ Research related KAVA(s).	1
EITHE04.4	Number of start-ups established in year N as a result / based on the output(s) of KAVA(s) having financial transactions of at least 10 000 EUR for services/products.	1
EITHE08.1	Number of participants in (non-degree) education and training	-

EITHE08.2-EITRIS	Number of EIT RIS Participants in (non-degree) education and training	-
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The proposers are free to select the most appropriate KPIs for their proposal. The above KPIs are based on the guidelines received from EIT and might be amended when the updated guidelines for KPIs will be available. The full description of the KPIs is presented in the annex.

### 3.4.2 Topic 2

Every proposal must contribute the following KPIs according to the minimum target indicated below. Proposing a higher target than the minimum required but still credible and justified, will be positively evaluated.

KPI	Short title	Minimum Target
EITHE08.1	Number of participants in (non-degree) education and training	75
EITHE08.2-EITRIS	Number of EIT RIS Participants in (non-degree) education and training	75
EITHE07.1	Number of graduates and participants from EIT-labelled programmes	25
EITHE07.2-EITRIS	Number of EIT RIS graduates and participants from EIT-labelled programmes	25

Additionally, every proposal could contribute to one or more KPIs listed below:

KPI	Short title	Minimum Target
KIC.G03	Number of digital nuggets created	-
KIC.G04	Number of digital nuggets consumed	-
KIC.G05	Number of learning paths created	-
KIC.E01	Number of badges issued to document and testify the achievement of a learning outcome	-

Please note that EIT RIS KPIs are not supplementary KPIs and only reflect the RIS aspect of the core KPIs.

### 3.5 Dissemination, communication, and exploitation

Applicants must engage in dissemination, communication and exploitation of the results of the activities. Applicants needs to respect the provisions of Article 16 regarding the Intellectual Property Rights (IPR) — Background And Results — Access Rights And Rights and Article 17 regarding Communication, dissemination and

visibility rules of the (Model) Grant Agreement<sup>17</sup>, including branding guidelines and obligations. Communication activities and infrastructure, equipment of major results funded by the grant must display the KIC's logo with the following text: “KIC [name] is supported by the European Institute of Innovation and Technology (EIT), a body of the European Union”).

### 3.6 Budget and funding

The total maximum EIT funding allocated to this call is up to 2 EUR million. The amounts will be allocated according to the below estimation.

Call Thematic	Total EIT funding allocated	EIT funding per proposal
RIS	2 EUR million	Topic 1: 450k EUR per proposal Topic 2: 200k EUR per proposal

All consortia partners should have a justifiable core role with an appropriate budget to perform their defined activities. Performative participation in projects or inclusion of partners without justifiable intrinsic value who are not demonstrably essential to project outcomes will be questioned during the evaluation and portfolio selection.

Please note that the information above is provided for information only and does not constitute any kind of commitment on behalf of EIT Manufacturing. Final EIT funding allocated might vary significantly based on the number of proposals evaluated and selected and other factors. The exact number of activities to be funded will depend on the quality of the proposals received and the total funding available.

Activity proposals submitted to this call are expected to have a minimum co-funding rate as follow:

Topic	Minimum co-funding rate
Topic 1.A	30%
Topic 1.B	30%
Topic 1.C	15%
Topic 2	15%

The minimum co-funding rate refers to the total project budget.

Partners in a consortium may have different co-funding rates as long as the overall project co-fund meets the required minimum.

<sup>17</sup> [https://ec.europa.eu/info/funding-tenders/opportunities/docs/2021-2027/common/agr-contr/general-mga\\_horizon-euratom\\_en.pdf](https://ec.europa.eu/info/funding-tenders/opportunities/docs/2021-2027/common/agr-contr/general-mga_horizon-euratom_en.pdf)



### 3.7 Payment scheme and Certified Financial Statement

EIT Manufacturing will transfer funding in instalments. A proportion of the activity budget will be prefinanced. The second instalment is linked to the interim activity monitoring as explained in paragraph 3.10. The last instalment will be transferred at the end of the activity, once eligible costs have been determined and following the completion of final activity monitoring assessment and the fulfilment of all obligations specified in the Financial Support Agreement:

- First instalment, corresponding to 35% of annual EIT funding
- Second instalment, corresponding to 25% of annual EIT funding
- Last payment corresponding to the 40% of annual EIT funding

Funding will be allocated to successful applicants provided that the relevant (Model) Grant Agreement between EIT Manufacturing and EIT is in place.

Prior to the payment, the cumulative funding received by an individual entity in the Business Plan 2023- 2025 for all the EIT Manufacturing projects they participate in will be checked. Whenever an entity reaches a cumulative EIT funding of 430,000 EUR, a Certified Financial Statement (CFS) audit will be requested prior to the payment.<sup>18</sup>. The CFS audit will be performed by an external auditor. EIT Manufacturing will provide the reference of the appointed auditor.

The CFS review is independent from the Activity monitoring described in paragraph 3.10.

The scope of the CFS audit is to check the eligibility of the costs reported so far by a specific entity for all projects where they participate, altogether. The first CFS audit will check costs reported up to a specific date “D”. A second CFS audit (meaning an entity reaches again a cumulative EIT funding of 430,000 EUR) would check the costs reported from date “D+1 day” to date “D2”, and so on. The result of each CFS audit can be either:

1. No findings are detected. All costs are paid according.
2. The auditor report lists findings: EIT Manufacturing Finance department will decide if the findings correspond to ineligible costs. The decision will be based on conditions for cost eligibility set out in the Horizon Europe Model Grant Agreement and transposed in the document “Eligibility of Expenditure”, which is part of EIT Manufacturing Call for Proposals documentation. In the case that EIT Manufacturing determines that the CFS findings are ineligible costs, these costs are excluded from the amount to be paid to the partner.

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<sup>18</sup> According to Art 24.2 of the Horizon Europe MGA

## 3.8 Eligibility of expenditures

For more information about the eligibility of the costs, you can refer to the Horizon Europe (Model) Grant Agreement and in particular Article 6 and the document “Eligibility of expenditures” attached to this call.

## 3.9 Financial sustainability – Services Agreement

To ensure a continued support to consortia, in particular their business owners, in their effort to commercialise the outputs of their funded activities, EIT Manufacturing is setting up a new Services Agreement framework. This framework will also allow EIT Manufacturing to gradually become financially independent from EIT funding and secure its ability to continue supporting European manufacturing organisations in the long term, with the goal to bring innovation to the European market, reinforce competitiveness, create jobs and develop the appropriate skills for students and professionals.

Throughout the execution of the activities the consortium will receive support from EIT Manufacturing to help them achieve their objectives. The Services Agreement describes a list of services which will be provided to the consortium during the implementation of the activity and offers the possibility for the business owner to receive additional support after the end of the activity.

### 3.9.1 Topic 1

The services provided by EIT Manufacturing to the consortium for activities under Topic 1 include:

- During the activity:
  - Dedicated support from an EITM Project Manager;
  - Participation to dissemination or business events;
  - Matchmaking with any stakeholders that may be interested in the activity (Businesses, Research Centres etc);
  - Support to drive the innovation to success and grow the business.
- After the end of the activity:
  - Further matchmaking with any stakeholders that may be interested in the activity to further expand it and fully monetize it at pan-European level;
  - Training and/or coaching based on business owner’s expressed needs and EIT Manufacturing’s catalogue of training courses;
  - Access to insights from EIT Manufacturing and its network of experts on topics related to the activity.

### Payment conditions

The payment scheme and duration of the Services Agreement are as follows:

1. An initial payment of EUR 50,000 triggered at the end of the activity, corresponding to the provision of services during the activity. This amount is expected to be shared among all consortium members.
2. Subsequent payments, according to a revenue sharing mechanism for a duration of 5 years, to be paid by the business owner. The payments will be due in Q1 of a given year relative to the total sales of the previous year. This mechanism will be triggered by the first subsequent sales of the key marketed innovation beyond the first EUR 10,000 needed to reach EITHE02.4 KPI, and the first payment will cover sales performed during the year of the first sales.

Business owners can select the percentage of revenue sharing of the mechanism however, this percentage should not be lower than 5%. The projected payment to EIT Manufacturing of an ambitious proposal, calculated from the revenue projections provided in the application, is expected to be equivalent to the grant requested. This projection is not a commitment as the real payment to EIT Manufacturing will be based on actual sales.

All selected activities should sign the Services Agreement before their start. In case the conditions proposed by the applicant are deemed not satisfactory in view of the potential of the project, EIT Manufacturing could enter in a negotiation of those conditions before the signature.

#### Alternative mechanism for start-ups

If the business owner is a start-up or a start-up to be created during the activity, they can request to convert the above mechanism to an equity shares agreement by ticking the associated box in the application form. In this case, the start-up business owner can contribute the financial sustainability requirement by offering equity instead of cash. If the proposal is selected, the business owner would then go through EIT Manufacturing internal investment evaluation process in parallel to the activity implementation. In case of successful evaluation, the business owner would enter a negotiation with EIT Manufacturing regarding the equity shares agreement.

**Only start-ups that are successful in this process will be allowed to use this alternative mechanism. All business owners, including start-ups, must initially accept the general mechanism.**

### 3.9.2 Topic 2

The selected Education activities are expected to lead to the commercialization of the proposed learning programme(s) following the project's conclusion. This will ensure the roll out of the learning programme and the increase impact of the activity over

time. Each proposal should present a credible and feasible commercialization strategy, outlining how the learning programme will reach the market and the expected number of learners to be engaged.

The services provided by EIT Manufacturing to the consortium for activities under Topic 2 include:

- During the activity:
  - Dedicated support from an EITM Project Manager;
  - Participation to dissemination or business events;
  - Support and guidance for the creation of interactive digital learning content;
  - Support on the definition of the commercialization strategy.
- After the end of the activity:
  - Promotion and marketing through EIT Manufacturing digital learning platform.
  - Further matchmaking with any stakeholders that may be interested in the activity to further expand it and fully monetize it at pan-European level;

This support serves as a counterpart for the revenue shared with EIT Manufacturing, allowing the activities to have resources, guidance, and assistance to maximize their chances of success and impact.

To ensure the success of the learning programmes, those with synchronous or hybrid learning experiences will be marketed and commercialized both by the selected Business Owner(s) and EIT Manufacturing. Thus, the Business Owner(s) must guarantee and commit to:

- Delivering the learning programme(s) at least four (4) times per year for a minimum of two (2) years after the activity concludes.
- Marketing, commercializing, and delivering at least two (2) of such sessions each year.

It should be noted that the possibility of commercializing and delivering additional sessions will be subject to agreement by the involved parties.

Revenue sharing will depend on the party responsible for commercializing the session:

- If EIT Manufacturing sells the learning program, it will retain 50% of the revenues.
- If the Business Owner(s) sell the learning program, they must allocate a minimum of 20% of the revenues to EIT Manufacturing.

In the event that the Business Owner fails to deliver the sessions sold by EIT Manufacturing, they will be required to compensate EIT Manufacturing with an amount equal to the loss of expected revenues (calculated based on the price of training per the number of expected participants).

For hybrid programs, the revenue share will be calculated based solely on the price related to the synchronous activity. Throughout the program execution, EIT Manufacturing and the Business Owner may review the pricing strategy to ensure alignment with market expectations and costs.

In cases where the proposal involves the creation of digital learning content, the creators must commit to signing the Digital Content Agreement (DCA) by the 10th month of the activity and include a formal deliverable for its signature in their work plans. This agreement grants EIT Manufacturing the license to commercialize the digital learning content developed in Education Activities through EIT Manufacturing's digital learning platform (see Digital Content Agreement and annex A).

Proposals must outline, in the submission system, their plan and commitment for delivering the programme after the activity ends and the expected revenue projection for the years following the activity end date. The proposal should clearly state the number of sessions they commit to selling and delivering each year, as well as the duration of availability of the learning programme. Moreover, the commercialization strategy should include estimates of the learning program's expected costs and pricing. Experts will review the delivery plan and revenue projections, assessing potential impact and the proposal's eligibility for funding (considering the overall budget).

### **3.10 Activity monitoring**

All activities selected for funding undergo continuous monitoring by EIT Manufacturing to ensure effective progress and implementation and to trigger payments (the latter only at interim and final stage).

The monitoring at the end of each quarter will cover several aspects relating to the activity implementation including, but not limited to:

- achievement of deliverables and KPIs;
- risk management;
- financial management;
- quality assurance;
- progress against KPI achievement and impact delivery;
- communication and dissemination;
- co-branding; and
- progress towards commercialisation and exploitation of results.

EIT Manufacturing will request regular reporting of actual costs incurred with the subgrant, as well as regular reporting of KPIs and deliverables, together with the supporting documentation.

The monitoring process may result in an amendment to the Activity workplan and/or budget, however the Services Agreement (please refer to Section 3.9) and the KPIs targets (please refer to Section 3.4) cannot be renegotiated/reduced after the start of the activity.

In the case of under-performance, significant delay of implementation, misconduct of the consortium, or any other reason jeopardizing the timely implementation of the activity identified during the monitoring process, EIT Manufacturing reserves the right to discontinue or restructure the funding of the activity at any point during its duration.

At final stage, in the case of underperformance, the overall grant awarded can be decreased up to 100% of the eligible costs based on the following table:

Type of underperformance	Funding reduction <sup>19</sup>
Missing Core EIT KPI	20%
Missing DEL	10%
Missing EITM KIC KPI	5%

Please note that the “Commercialization Plan” deliverable is mandatory for the midterm evaluation. Activities without the Commercialisation Plan (including updated revenue projections) will be considered as a significant delay of the implementation.

Furthermore, EIT Manufacturing will monitor all activities up to 5 years after activity completion to track long-term impact and the status of commercialisation and to ensure the achievement of KPIs after the activity end.

The successful execution and completion of the activities financed under the framework of the present call may unlock the possibility to receive additional funding. Only projects assessed as “green” according to the “Activities Monitoring Process Guidelines” may be eligible for fast-track opportunity via a subsequent dedicated call or direct award.

For more information about the monitoring process, you can refer to the document “Activities Monitoring Process Guidelines” attached as an annex to this call.

### 3.11 Mandatory deliverables

The minimum core deliverables expected from an activity are listed in the table. This provides the minimum requirements on compliance.

Deliverable name	Delivery date (in months)
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<sup>19</sup> % of funding reduction is calculated on the granted amount and it can be cumulative

Plan for dissemination and exploitation including communication activities	Within the first 6 months of the activity
Gender equality plan	Within the first 6 months of the activity. Only public or private research organizations or higher education establishment.
Publishable summary of achievements to be used as dissemination material by EIT Manufacturing	By the end of the activity

A maximum of 2 additional added-value deliverables can be added to the proposal. All mandatory deliverables have to be reported by the due time for the proper monitoring of the activity. Additionally, internal documentation and technical reports could be produced by the consortium for project use. However, these documents should not be listed in the proposal. In case of a failure to deliver on project outcomes or delays, these project internal documents may be provided as supporting or mitigating evidence to EIT Manufacturing.

In addition, the mandatory deliverables for **Topic 1** are:

Deliverable name	Delivery date (in months)
Consortium agreement (including clear rules regarding the exploitation of IP generated during the activity)	Within the first 3 months of the activity
Final Business Plan	Within the first 6 months of the activity
Sustainability report	Month 11
Result Report	By the end of the activity

In addition, the mandatory deliverable for **Topic 2** are:

Deliverable name	Delivery date (in months)
Learning programme curriculum	By month 9
Commercialization Plan and scalability Plan	Within the first 6 months of the activity
Digital Content Agreement	By month 10. Applicable for activities creating digital learning content

Additionally, activities must comply with the following milestones for **Topic 2**:

Milestone	Due date (in months)	Applicable to
Programme outline and learning outcomes of the learning paths and/or modules defined	Month 4	All activities

Synchronous sessions' structure defined	Beginning of month 5	Activities with synchronous sessions
First two nuggets ready for preliminary review	Beginning of month 5	Activities with Digital Content
Peer reviewed finalized	End of month 8	Activities with Digital Content
Content published	End of month 11	Activities with Digital Content



## 4. Proposal preparation and submission

### 4.1 Guidance and support on proposal preparation

To guarantee the maximum support from EIT Manufacturing to both current and potential partners and stakeholders, two different support offers will be provided during the proposal preparation process: the call information events and the EIT Manufacturing call contact points.

#### Call information event

The EIT Manufacturing will carry out a series of events before and after the publication of the call to ensure open, free, and fair access to the wider manufacturing community. The overview is provided in the table below.

Event type	Date
Info day and MatchMaking event	29-30 April 2024
Q&A Session and live demo on the application form	7 <sup>th</sup> May 2024 at 10:00 CEST
Q&A session on the call topics	5 <sup>th</sup> June 2024 at 11.30 CEST

#### Call Contacts

Access to [Agora](#), our online community platform, is open to all entities to have access to the most updated information on the call and to help build up proposal consortia.

All applicants may contact EIT Manufacturing to ask questions and clarify any points on general/technical aspects and call content by contacting [support@eitmanufacturing.eu](mailto:support@eitmanufacturing.eu) and [ris@eitmanufacturing.eu](mailto:ris@eitmanufacturing.eu).

**With a view to equal treatment, EIT Manufacturing staff cannot give prior opinion on the admissibility, eligibility, quality or any other relevant element of a specific proposal. Applicants are strongly discouraged from approaching any member of the Selection Committee to seek for specific advice or support regarding their application.**

### 4.2 Registration and submission process

Before submitting a proposal, all applicants (Activity Leader and consortium members) must register on the:

1. EU Participant Portal to obtain a PIC number.<sup>20</sup> If you have already participated in projects funded by the EU before and have your PIC number validated, you can proceed with the registration of your organisation on the submission tool. If this is your first time participating in an EU-funded project or your organisation cannot access your already validated PIC and there are updates to the

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<sup>20</sup> <https://ec.europa.eu/info/funding-tenders/opportunities/portal/screen/how-to-participate/participant-register>

organisational data that need to be done, you need to register/re-register your organisation. Primary registration of your PIC number takes about 10 minutes, and your PIC number is generated within another 10 minutes and will be sent to the email address that you have indicated during the registration. All new PIC numbers get assigned a status of “Declared”, which means your organisation has not been fully validated, but the new PIC number can already be used during your proposal submission.

2. Submission tool<sup>21</sup> expression of interests to participate to the call. Please note that the expression of interests processing is not automatic and needs to be reviewed and approved by the EIT Manufacturing team after the registration by the applicants. If you have already participated in calls of EIT Manufacturing before, you can proceed with the next steps and the proposal creation. Please make sure that the information that you are providing on the submission tool is consistent with the legal information connected to your PIC (legal name, VAT, registration number, legal address, LEAR – legally appointed representative responsible for updating the organisation’s information on the EU participant portal).

**All entities participating in this call for proposals must be registered in the submission tool as early as possible and no later than 3 working days before the call closes, 3rd July at 17:00 CEST otherwise they may not be eligible for funding.**

Please note that, if your proposal is successful, the information provided when registering your organization will need to be validated. EIT Manufacturing will contact you to submit the needed supporting documents.

### 4.3 Proposal submission mandatory documentation

The following documentation must be submitted by the applicants through the submission tool **no later than the call deadline**:

- Online application form;
- Declaration of Honour duly signed by each member of the consortium;
- In addition, for Topic 1:
  - Business Plan (pdf only)
  - GANNT chart (pdf only)
- In addition, for Topic 2:
  - Business Owner Deck
  - Instructional designer deck

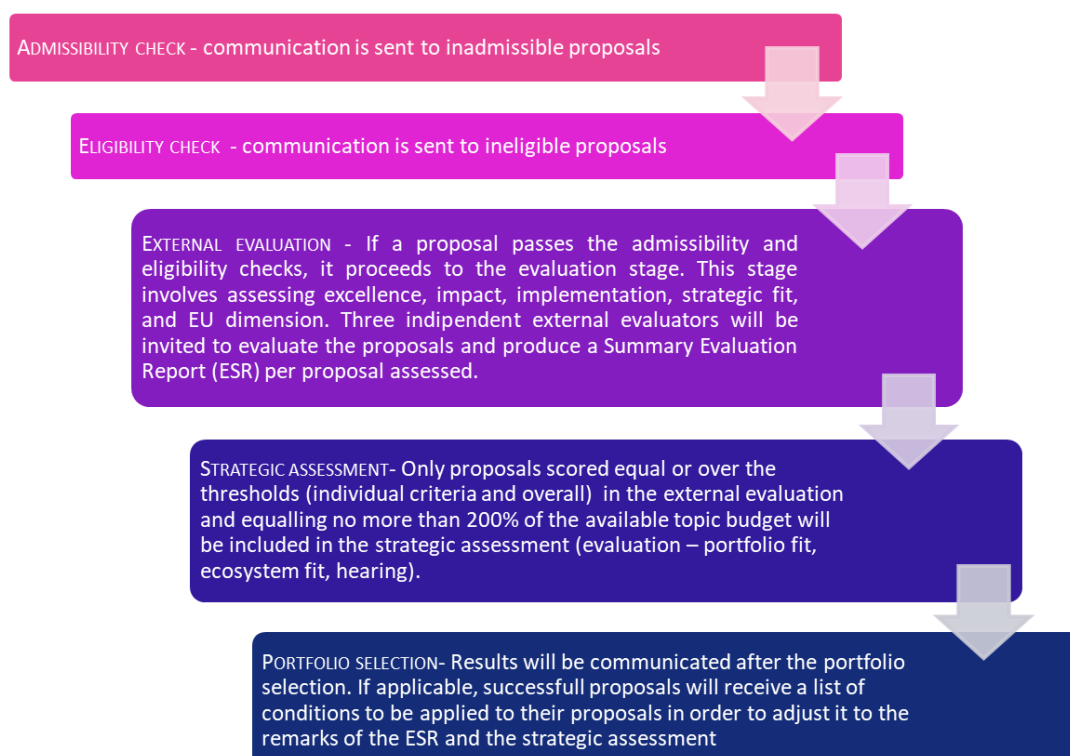
NB: Any documentation missing, incomplete or sent after the deadline, will be inadmissible.

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<sup>21</sup> Links to the submission tool are provided on the page 10

## 5. Proposal evaluation and selection

Once submitted the proposals, will proceed through the following steps:



The full proposal evaluation will consider both the external evaluation as well as the strategic assessment top-up scores. The total scoring of 100 points is distributed as:

External evaluation	Excellence	Max score 20 Threshold 14/20
	Impact	Max score 25 Threshold 15/25
	Implementation	Max score 15 Threshold 9/15
	Strategic fit	Max score 15 Threshold 9/15
	Eu dimension	Max score 5 Threshold 3/5
Total points external evaluation		<b>80</b> Threshold 48/80
Strategic assessment	Remote assessment	Max score 10
	Hearing	Max score 10
Total points strategic assessment		<b>20</b> Threshold 12/20
Total points (external evaluation + strategic assessment)		<b>100</b>

## 5.1 Admissibility check

Applications must be:

- submitted before the **call deadline** (*see Call Summary*);
- submitted in **English**;
- submitted **electronically** via the submission tool. Paper submissions are NOT possible; and
- **complete** and contain all the mandatory information in the online application form and all mandatory documentation.

Proposals containing one or more inadmissible elements will be **rejected** and will receive an official communication from EIT Manufacturing setting out the outcome of the admissibility check.

## 5.2 Eligibility check

A proposal will be eligible if it shows:

<b>Consortia composition</b>	<p>The consortium shall be composed of minimum 3 legal entities independent from each other and each established in a different country as follows:</p> <ul style="list-style-type: none"><li>• at least <b>3 independent legal entities from 2 different RIS countries</b>.</li><li>• entities shall be geographically based in countries covered by at least, <b>2 different EIT Manufacturing ICs</b>.</li><li>• the following roles shall be clearly covered within the consortium:<ul style="list-style-type: none"><li>○ <b>Lead Partner</b>. The organisation in charge of coordinating the consortium through the Activity Leader.</li><li>○ <b>Business Owner</b>. At least 1 Business Owner, organisation in charge of the commercialisation of the result(s). The role of Business Owner is limited only to organization with a legal entity established in a Member State or Country associated to Horizon Europe <b>AND EIT RIS eligible country</b> at the time of submission of the application.</li></ul></li></ul> <p>In addition, for <b>Topic 1</b>:</p> <ul style="list-style-type: none"><li>○ <b>End-User</b>. At least 1 end-user, must be consumer of the solution(s). <b>The end user(s) should come from a EIT RIS eligible country for the RIS Call for Proposals.</b></li></ul>
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	<p>In addition, for <b>Topic 2</b>:</p> <ul style="list-style-type: none"> <li>○ <b>Manufacturing Company.</b> At least 1 manufacturing company that will not only consume the learning programmes but support in definition and identification of the skills' development needs. <b>The Manufacturing Company(ies) should come from a EIT RIS eligible country for the RIS Call for Proposals.</b></li> </ul>
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Proposals containing one or more ineligible elements will receive an official communication from EIT Manufacturing setting out the outcome of the eligibility check and explaining why the proposal failed to meet the criteria.

The Activity leader of any proposal deemed ineligible who disputes the ineligibility decision, may appeal. This appeal must be made within 5 working days from the official EIT Manufacturing notification of ineligibility by sending an email to [support@eitmanufacturing.eu](mailto:support@eitmanufacturing.eu) according to the Appeal procedure document linked to the Call (see paragraph 5.7).

### 5.3 External evaluation

The proposals which successfully pass the eligibility check are evaluated and scored against 5 criteria: Excellence, Impact, Implementation, Strategic Fit and EU Dimension.

The evaluation process will be carried out by three independent external evaluators supported by one independent external rapporteur.

External evaluators will assess each evaluation sub-criteria will be assessed according to the following scores on a scale **from 1 to 5**.

Score	Description	
1	<i>Extremely poor or None</i>	The information provided is considered irrelevant or inadequate compared to the specific call provisions
2	<i>Bad</i>	The information provided lacks relevant quality and contains significant weaknesses, compared to the specific call provisions
3	<i>Average</i>	The overall information provided is adequate, however, some aspects are unclearly or insufficiently detailed, compared to the specific call provisions
4	<i>Good</i>	The information provided is adequate with sufficiently outlined details, compared to the specific call provisions
5	<i>Excellent</i>	The information provided is outstanding in its details, clarity, and coherence, compared to the specific call provisions

The scores shall be given at sub-criterion level are then summed together to come with a final score per criteria.

Thresholds apply to individual criteria and to the total score. The maximum score for a proposal at external evaluation stage is 80. The default overall threshold is 48/80.

The three independent external evaluators will evaluate each proposal and produce an Individual Evaluation Report (IER)- each proposal is evaluated 3 times. The independent external evaluators will meet in a consensus meeting chaired by a rapporteur to discuss and build an agreement. The rapporteur will address any notable divergences between them and will develop the final Summary Evaluation Reports (ESRs).

The detailed sub-criteria evaluation grid is provided here below.

### 5.3.1 TOPIC 1 RIS Innovation:

For each sub-criteria, specific information and evidence are expected. Please refer to the “RIS\_Expected information and evidence” document in the call webpage.

<b>Excellence</b>	<b>Max. scoring 20</b>
	<b>Threshold 14/20</b>
<b>Coherence</b>	
The proposal clearly outlines its objectives in a quantitative manner that can be achieved and measured by the end of the project. The objectives of the proposal are pertinent to the RIS call for proposals aim.	5 points
<b>Novelty</b>	
The result of the activity represents a step forward compared to the current state-of-the-art innovation, in terms of technology, application, or business model, and shows technical and commercial scalability potential.	5 points
The consortium provided tangible evidence of the starting TRL (Technology Readiness Level) of the solution, and the path towards TRL 8 by the end of the activity seems feasible and is well substantiated.	5 points
The proposal clearly identifies the industrial needs and market demand, considering the involved/targeted EIT RIS countries' innovation and manufacturing ecosystem. It demonstrates how the proposed innovation aligns with the sector's strategic objectives.	5 points
<b>Impact</b>	<b>Max. scoring 25</b>
	<b>Threshold 15/25</b>
<b>Project pathways towards impact</b>	
The consortium provides a comprehensive and insightful overview of the 'Market Opportunity' description of the	5 points

Business Plan, detailing the product or service description, value proposition, target customers, market size, industry analysis, competitor landscape, and barriers to entry with clarity and depth.	
The consortium outlines a robust 'Strategy & Execution' plan of the Business Plan, showcasing a well-developed marketing and sales strategy, a detailed go-to-market plan and intellectual property strategy, and a comprehensive SWOT analysis, indicating a strong approach to market penetration and growth.	5 points
The consortium presents clear and credible "Ownership & Financial' details in the Business Plan, including promising financial projections, accurate break-even analysis, and detailed business owner information, demonstrating capability to successfully launch the solution into the market and long-term viability.	5 points
The proposal convincingly describes how the innovative solutions contribute towards impact (including the commercial impact and estimation of scale and significance) and the direct and indirect social and environmental impact addresses by the proposal are significant.	5 points
<b>Effectiveness of the proposed measures to exploit the key marketable innovation(s) and to maximise impact</b>	
The proposal's contribution to achieving the mandatory EIT Core KPIs is evaluated as feasible and credible and the Dissemination Plan (including communications and outreach) is in line with the outlined commercial strategy. Additional KPIs are considered as a plus.	5 points
<b>Implementation</b>	<b>Max scoring 15</b>
	<b>Threshold 9/15</b>
<b>Workplan, including allocation of budget, tasks, and resources</b>	
The workplan and timeline are aligned with the proposal's overall objective, including the management of the relevant risks identified.	5 points
The proposal budget and resources allocated are clearly outlined, justified and reflects value for money.	5 points
<b>Consortium fit for purpose</b>	
The applicants represent the right competencies, skills and expertise per the proposal scope with differentiated, clear and specific roles.	5 points
<b>Strategic fit</b>	<b>Max. scoring 15</b>
	<b>Threshold 9/15</b>

The proposal and described expected outcomes and impacts are aligned with the topic selected and they contribute to achieve one or more EITM Strategic Objectives.	5 points
The proposal offers an ambitious financial sustainability return to the KIC.	5 points
The proposal will strongly contribute to the advancement of the innovation performance of RIS countries and will benefit for stakeholders in RIS countries and/or regions. Engaging in its activities a significant number of partners and/or activity partners from RIS countries is considered a plus.	5 points
<b>European Dimension</b>	<b>Max. scoring 5</b>
	<b>Threshold 3/5</b>
The consortium demonstrates pan-European outreach, and the proposal considers relevant synergies with other EU instruments and programs.	5 points

### 5.3.2 TOPIC 2 RIS Education:

<b>Excellence</b>	<b>Max. scoring 20</b>
	<b>Threshold 14/20</b>
<b>Coherence</b>	
The proposal clearly describes the resulting learning program(s), explaining their relevance to the selected topic, and includes an estimation and explanation of their scale and significance. The learning program(s) complies with the requirements defined in the call guidelines. The proposal foresees a final assessment of the achievement of the learning outcomes.	5 points
The methodology and strategy to engage participants are clear, including a gender perspective, and include the integration of innovation and business perspective (Knowledge Triangle Integration).	5 points
<b>Novelty</b>	
The proposal clearly defines the needs of the proposed skilling/upskilling/reskilling/reskilling programme considering market demand, industrial requirements, and conditions of the target group, specifically for the EIT RIS countries targeted.	5 points
The proposal goes beyond the existent state of the art of professional education and training formats and/or content and clearly demonstrates that resulting learning programme	5 points



will make use of innovative teaching, learning and upskilling methodologies and approaches.	
<b>Impact</b>	<b>Max. scoring 25</b>
	<b>Threshold 15/25</b>
<b>Project pathways towards impact</b>	
The proposal clearly describes how the learning programme(s) contribute to the expected outcomes and impacts from the call topic, and include an estimation and explanation of their scale and significance.	5 points
The proposal addresses specific target group/s and/or market sector/s. The proposal demonstrates a competitive advantage over existing offers in the market and strongly contributes to the advancement of the manufacturing workforce in EIT RIS countries.	5 points
<b>Effectiveness of the proposed measures to exploit the key marketable innovation(s) and to maximise impact</b>	
The proposal identifies the Business Owner and demonstrates its track record on the commercialization and delivery of learning programmes aligned with the results of the activity. The identified Business Owner is committed and capable of commercializing and delivering the learning programme(s) after the completion of the activity.	5 points
The proposal describes a clear, feasible and convincing commercialisation and/or exploitation strategy of the learning programme(s) and the communication plan is in line with the outlined commercial strategy.	5 points
The proposal contribution to achieve the mandatory EIT Core KPIs is credible and shows potential to exceed minimum KPI targets to reach significant shares of the target groups. Additional KPIs are considered a plus.	5 points
<b>Implementation</b>	<b>Max scoring 15</b>
	<b>Threshold 9/15</b>
<b>Workplan, including allocation of budget, tasks, and resources</b>	
The workplan and timeline are aligned with proposal overall objective, including the management of the relevant risks identified.	5 points
The proposal budget and resources allocated are clearly outlined, justified and reflects value for money.	5 points
<b>Consortium fit for purpose</b>	
The applicants represent the right competencies, skills and expertise per the proposal scope with differentiated, clear and specific roles.	5 points

<b>Strategic fit</b>	<b>Max. scoring 15</b>
	<b>Threshold 9/15</b>
The proposal and described expected outcomes and impacts are aligned with the topic selected and they contribute to achieve one or more EITM Strategic Objectives.	5 points
The proposal provides a credible strategy and a reasonable revenue share (%) for contributing to the EIT Manufacturing financial sustainability.	5 points
The proposal will strongly contribute to the advancement of the innovation performance of EIT RIS countries and will benefit for stakeholders in RIS countries and/or regions. In addition, the proposed activity is going to engage in its activities a significant number of partners and/or activity partners from RIS countries.	5 points
<b>European Dimension</b>	<b>Max. scoring 5</b>
	<b>Threshold 3/5</b>
The consortium demonstrates pan-European outreach and the proposal considers relevant synergies with other EU instruments and programs.	5 points

## 5.4 Strategic assessment and portfolio selection

Starting with the highest-scoring proposal and proceeding in descending order, a selection will be made of the best-ranked proposals that meet or exceed the thresholds in both individual criteria and overall (consensus meeting results). Only proposals requesting aggregated financial support equalling to no more than 200% of the available budget per topic will be shortlisted for the strategic assessment and portfolio selection.

The strategic assessment consists of a remote assessment and a hearing totalling up to 20 additional points. Proposals that do not reach or exceed the threshold of 12 points on this assessment will not be considered for the final selection.

### Remote assessment

Each proposal will be evaluated by the Thematic Pillar Director and one IC Managing Director. They will assign a maximum of 10 additional points by assessing the following 2 criteria:

Criteria	Description of criteria	Max Score
Portfolio fit	The proposal reinforces EITM portfolio of activities	5 points

	boosting the innovation capacity of RIS countries and supported business owners	
Ecosystem fit	The proposal contributes to strengthening and expanding the EIT Manufacturing RIS ecosystem	5 points

### Hearing

The hearing jury is composed of 3 members of the Management Team, nominated by the CEO based on subject matter relevance (e.g. innovation director, investment director, CFO, etc.) and supported by internal subject matter experts (in a consulting role, not voting) as needed. The hearings will be held online. A maximum of 3 persons may represent a proposal. Only individuals mentioned in the proposal and involved in project implementation can represent the proposal during the hearing. No consortium participant may provide more than 1 person for the hearing.

The total duration of the interview is approximately 30 minutes. The first part is the team pitch of the proposal to which 10 minutes are allocated. The rest of the time is dedicated to questions and answers (Q&A).

The team should convincingly build the pitch considering the evaluation criteria. The panel will ask questions to clarify various aspects of the proposal in line with the evaluation criteria and the ESR.

A template, specific questions, and further instructions on how to prepare for the hearing will be provided to shortlisted applicants together with the invitation to the hearing. A maximum of 10 additional points will be assigned by assessing the hearing performance as follows:

Criteria	Description of criteria	Max Score
Hearing performance	<ul style="list-style-type: none"> <li>• Credibility and quality of the pitch delivered.</li> <li>• Cohesion and motivation of the consortium</li> <li>• Clarity on the responses to the questions asked</li> <li>• Responses to issues and concerns expressed in the external evaluation ESR, if applicable.</li> </ul>	10 points

## Portfolio selection

The Thematic Pillar Director in charge presents the revised final ranking, which incorporates the strategic assessment scores. This final ranking will undergo discussion with the EIT Manufacturing Management Team members in the portfolio selection meeting. Proposals will be selected based on the final ranking and available budget.

High-quality proposals not selected due to budget constraints will be placed on the reserve list.

## 5.5 Call Report and Stand-still period

At the end of the evaluation process and when the portfolio selection is completed, EIT Manufacturing sends the Call Report & the Final ranking list to the granting authority (EIT) and applies a stand-still period of 30 days before signing agreements with the selected recipients, in order to allow the granting authority to verify compliance with the procedural requirements.<sup>22</sup>

## 5.6 Communication of results and negotiation period

EIT Manufacturing will inform by email all proposals leaders within 5 working days after the evaluation is completed.

The applicants might receive 4 types of evaluation feedback:

- The proposal is accepted for funding. The proposal has got a high evaluation score and is selected for funding based on available budget assumptions.
- The proposal is accepted for funding with conditions. The proposal has got a high evaluation score and is selected for funding based on available budget assumptions. Conditions for changes will be provided from EIT Manufacturing. Changes shall be done and re-submitted on time. If the Proposal Leader fails to comply with the requested conditions or does not respond by the time allocated, the proposal will be rejected and the next proposal on the ranking list will be then proposed for funding.
- The proposal is rejected. The proposal has failed to reach the threshold of an individual evaluation criterion or the overall threshold and is therefore not considered for funding.
- The proposal is retained in the reserve list: the proposal has passed all thresholds but due to budget constraints it cannot be funded. In case of finally unused budget, the proposal might become eligible for funding,

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<sup>22</sup> According to Rules on page 127-129 of the Horizon Europe MGA ([https://ec.europa.eu/info/funding-tenders/opportunities/docs/2021-2027/common/agr-contr/general-mga\\_horizon-euratom\\_en.pdf](https://ec.europa.eu/info/funding-tenders/opportunities/docs/2021-2027/common/agr-contr/general-mga_horizon-euratom_en.pdf))

e.g., in case a proposal accepted with conditions is not funded. The duration of the reserve list is up to end of March 2025.

The evaluation results will be provided to all applicants. The changes will need to be implemented in the proposals within 10 working days.

As soon as the communication of results is done, the successful participants will receive contractual documents to be signed with EIT Manufacturing, including:

- Internal Agreement – long term partnership within Horizon Europe Framework
- Financial Support Agreement - long term agreement regarding financial support to third parties under Horizon Europe

In parallel, each participant will need to provide additional documents to EIT Manufacturing, such as:

- Legal and financial documents (depending on the legal form of the participant and if requested by EIT Manufacturing)

## **5.7 Procedure for complaints and appeal**

The Activity Leader of a rejected proposal who disagrees with the decision may request an evaluation review. Only procedural aspects of an evaluation may be the subject of a request for an evaluation review, for example process errors or technical problems. The evaluation of the merits of a proposal shall not be the subject of an evaluation review. In this case, the Activity leader will have 5 working days after receipt of the final evaluation results to submit an appeal to EIT Manufacturing by sending an email to [support@eitmanufacturing.eu](mailto:support@eitmanufacturing.eu) according to the Appeal procedure document linked to the Call (see document Appeal procedure).

## 6. Other Terms and Conditions

### 6.1 Exclusion Criteria

Applicants will be excluded from participating in the call if they are in any of the situations of exclusion defined in Article 136 of the EU Financial Regulation.<sup>23</sup> All members of a consortium shall sign a Declaration of Honour in order to confirm that they respect the above-mentioned criteria at the application stage. Successful applicants shall provide, if requested by EIT Manufacturing, relevant recent documentation substantiating the Declaration of Honour at the latest before signing the agreements mentioned under point 5.6. Failure to provide adequate documentation may result in the exclusion of the applicants and the proposal concerned.

### 6.2 Logos and Trademarks of the Applicants

The entities participating in the Call for Proposal grant EIT Manufacturing and its subsidiaries (e.g., ICs) a free and non-exclusive license to use their brand solely for the promotion, dissemination of information, organisation, management and implementation of the Call for Proposal. The applicants and EIT Manufacturing mutually acknowledge and accept that the respective trademarks are, and remain, the exclusive property of their respective owners and that no provision of these guidelines is intended to confer any rights on such trademarks, outside the provisions of the previous paragraph. Therefore, the participating entities and EIT Manufacturing will not be able to assign, sublicense or otherwise dispose of the trademarks of others, without prior written consent.

Participating entities will send their brand related information (logos, brand guidelines and any other relevant communication material) as requested by EIT Manufacturing, to support@eitmanufacturing.eu in vector format or in image format with +300 dpi.

### 6.3 Confidentiality

EIT Manufacturing undertakes to use any Confidential Information shared by the entities solely for the purposes of the Call for Proposals. Confidential information shall mean data and/or information that is proprietary to, or possessed by the entities and not generally known to the public, or that has not yet been revealed whether in tangible or intangible form, whenever and however disclosed and might also be included in the application form. Confidential information must be expressly labelled as such in the application form.

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<sup>23</sup> <https://eur-lex.europa.eu/legal-content/EN/TXT/HTML/?uri=CELEX:32018R1046&from=EN>

Applicants agree that EIT Manufacturing and its subsidiaries can disseminate, publish, and make use of non-confidential information regarding the call, to promote the activities of EIT Manufacturing or establish reports or other necessary documents for EIT.

The applicants agree that data and information in the application form not labelled as confidential may be disclosed in connection with the activities of EIT Manufacturing.

Considering the confidential nature of the data and information referred to above, EIT Manufacturing also undertakes to (i) not disclose them in any way and in any form, without prior written authorization of the entity concerned; and (ii) not to use them for purposes other than those strictly necessary for the purposes of this Call for Proposals.

Confidential Information may be shared among EIT Manufacturing and its subsidiaries (e.g. ICs) solely for the purposes of the Call. EIT Manufacturing undertakes to impose this confidentiality obligation on its employees and the employees of its subsidiaries and its collaborators, as well as on Rapporteurs and independent experts and all subjects who, by virtue of participating in the call for proposal as members of the Selection Committees or Jury, will take knowledge of or may have access to such confidential data and information.

## 6.4 Intellectual Property

Participating entities agree to respect IPR Rules (Article 16) of the (Model) Grant Agreement<sup>24</sup>.

Participating entities also agree to respect the EIT Manufacturing IP Policy available on this link.

## 6.5 Disclaimers

EIT Manufacturing denies all liability from an applicant participation to the call for proposal.

Submitting application does not establish a grantor-grantee relationship between applicant and the EIT Manufacturing as final decision will be made after the evaluation process and the final confirmation of acceptance of the application and all other procedure mentioned herein.

These call for proposals guidelines may be subject to changes/update. In such a case, the changes will be communicated publicly (published) in a transparent and clear manner. Applicants having already applied will also be informed in writing.

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<sup>24</sup> [https://ec.europa.eu/info/funding-tenders/opportunities/docs/2021-2027/common/agr-contr/general-mga\\_horizon-euratom\\_en.pdf](https://ec.europa.eu/info/funding-tenders/opportunities/docs/2021-2027/common/agr-contr/general-mga_horizon-euratom_en.pdf)

## 6.6 Processing of Personal Data

EIT Manufacturing ensures that any processing of personal data shall be performed in accordance with Regulation (EU) 2016/679 of the European Parliament and of the Council of 27 April 2016, on the protection of natural persons with regard to the processing of personal data and on the free movement of such data, and in accordance with Directive 95/46/EC (General Data Protection Regulation). As a data subject you have the right of access, the right to rectification, the right to erasure, the right to restrict processing, the right to data portability, the right to object and the right not to be subject to a decision based solely on automated processing. If you have a question about personal data processing or want to exercise your data subject rights, you can contact our Data Protection Officer on [dpo@eitmanufacturing.eu](mailto:dpo@eitmanufacturing.eu). In the case of complaints, you can address them to the French regulator CNIL.

The collected personal data will be used solely for the procedure and assessment of the call applications and the management, completion, organisation, dissemination of information and publicity of the call. The data controller is EIT Manufacturing and its subsidiaries.

By submitting your application for this call, you consent that EIT Manufacturing will collect, transfer, process, store and delete your data in accordance with the aforementioned conditions. Details concerning the processing of your personal data are available in the privacy statement in the submission tool.

## 6.7 Applicable Law

The present call is governed by the applicable European Union laws (i.e. the EIT Regulation, the EU Financial Regulation and the Horizon Europe Regulation) and is complemented, where necessary, by the laws of France. The applicants agree to observe the obligations set forth in the (Model) Grant Agreement<sup>25</sup> signed between the EIT and EIT Manufacturing and particularly Articles 12 (conflict of interest), 13 (confidentiality and security), 14 (ethics), 17.2 (visibility), 18 (specific rules for carrying out action), 19 (information) and 20 (record-keeping). These obligations will also be mentioned in the contracts to be signed if the application is successful.

## 6.8 Rights to activate audits

EIT Manufacturing retains the right to activate an audit on the funded activities in case of alerts and/or to confirm governance and proper usage of the grant.

EIT Manufacturing keeps the right to request any data related to the activity for 5 years after completion to ensure transparency and allow monitoring from EIT.

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<sup>25</sup> [https://ec.europa.eu/info/funding-tenders/opportunities/docs/2021-2027/common/agr-contr/general-mga\\_horizon-euratom\\_en.pdf](https://ec.europa.eu/info/funding-tenders/opportunities/docs/2021-2027/common/agr-contr/general-mga_horizon-euratom_en.pdf)