

Call for Experts Guidelines (Evaluator or Rapporteur)

The EIT – Making Innovation Happen

European Institute of Innovation and Technology (EIT)

2024

www.eitmanufacturing.eu



Guidelines for applying

EIT Manufacturing looking for independent expert evaluators and rapporteurs that will be involved in the peer review evaluations of activity proposals submitted in the context of our Calls for Proposals, supporting EIT Manufacturing in selecting the proposals with the highest potential to grow Manufacturing in Europe (including specific calls related to RIS countries).

The portfolio of proposals to be evaluated covers the fields of Inno-to-Market, Education & Training and Regional Innovation Scheme (RIS), with particular focus on the thematic areas of **AI/Data**, **Circular Economy**, **Industrial Metaverse**, **Net Zero Industry** and **Renewable Energy**, and on **Upskilling/Reskilling**.

- **Evaluators** are responsible for evaluating proposals submitted in the frame of a Call for Proposals based on the specific Call Guidelines.
- **Rapporteurs** act at consensus meetings of evaluators' panels. Rapporteurs are responsible for drafting the Evaluation Summary Report of proposals discussed at a consensus meeting.

What we are looking for

- **External evaluators:**
 - Educational Excellence: Possess an advanced university degree in engineering, manufacturing, business, or a related field.
 - Professional Experience: Bring 10 years (minimum) of professional experience in the manufacturing industry, in at least one of the thematic areas.
 - Startup and Business Development: Experience in evaluating and/or nurturing startups, with a strong understanding of business creation, market analysis, financial forecasting, and assessing the commercial viability of new manufacturing solutions.
 - Sustainability and Future-Oriented Thinking: A passion for innovation and sustainability, with the ability to evaluate proposals that align with sustainable manufacturing goals and Industry 4.0, and a demonstrated capacity for creative problem-solving in the manufacturing domain.
 - Effective Communication: Excellent command of English (written and spoken)
 - Proposal Assessment: Prior experience in evaluating proposals for major funding bodies such as EU-funded programs, with a meticulous approach to assessment and the ability to provide constructive feedback to improve proposals.
- **External rapporteurs:**
 - Educational Excellence: Possess an advanced university degree in manufacturing, business, journalism or a related field.

- Professional Experience: Bring 5-10 years of professional experience in roles with technical writing as a critical skill. Additional experience in one of the thematic areas is a plus.
- Collaboration Design and Facilitation: Relevant experience in preparing, organising and facilitating workshops or similar.
- Effective Communication: Excellent command of English (written and spoken)
- Proposal Assessment: Prior participation in evaluations of EU-funded programmes as a rapporteur (or similar role).

Following your application

- Our teams will review the profile submitted (please make sure you are exhaustive in the information provided).
- If you are selected, you will be invited to participate as an expert evaluator and rapporteur in the context of the specific Call for Proposals, together with further details on the context and timing of the evaluation process.
- If you accept the invitation, you will be requested to sign a cooperation agreement, including confidentiality and conflict of interest declaration.
- If you are selected as an expert evaluator, then you shall be acquainted with the relevant background document (all call-related documents and guidelines) and attend the online briefing training. Expert evaluators will receive the assigned proposals and shall qualitatively evaluate them according to the pre-defined evaluation criteria. Expert evaluators must appraise each criterion (and each related question) with a score accompanied by a clear qualitative statement in English, strongly justifying the given score as well as providing evaluation conclusions per criterion. If applicable, suggested recommendations/conditions should be included. Expert evaluators are expected to be available to discuss their individual evaluation reports (IER) in consensus meetings with other evaluators, chaired by a rapporteur. Expert evaluators will receive the final minutes to be approved and signed for the final ranking of the reviewed proposals.
- If you are selected as Rapporteur, then you shall be acquainted with the relevant background document (all call-related documents and guidelines) and attend the online briefing training. Rapporteurs will receive the individual evaluation reports (IER) and shall collate the convergent or divergent opinions of experts into a single Summary Evaluation Report v0.1 per proposal. Rapporteurs shall create a list of relevant open issues to resolve from the IERs. Rapporteurs shall attend and chair the Consensus Meeting, take minutes of the discussion and scoring agreements and write up the final version of the Summary Evaluation Report based on the meeting minutes. Rapporteurs sign all Summary Evaluation Reports.

The tasks will be performed 100% remotely and fully in English.

Task and Fees

The financial compensation is predefined by the table below to cover the effort of the expert evaluators and rapporteurs.

Each expert evaluator or rapporteur will have to provide prior to the payment for the service provided:

- A signed declaration of time, based on the table below.
- The evaluation of each proposal (alternatively a summary evaluation report).
- An invoice to EIT Manufacturing, 2 Boulevard Thomas Gobert, 91120, Palaiseau, France.
- A signature of the minutes for the consensus meeting.

Call for Proposals' tasks and fees:

Type of task	Description tasks	Fee
Briefing experts and rapporteurs	Reading and getting familiar with call documents (including attendance of the briefing meeting). Attendance at the briefing meeting(s) and reading the call for proposal documentation shared by EIT Manufacturing.	EUR 85
Evaluation of Proposals - Call for proposals for mono-beneficiary grant/prize	Work related to the development of the Individual Evaluation Report (IER) /Work related to the development of the Evaluation Summary Report (ESR). <i>Drafting and finalisation of the report, including comments for each criterion. (if applicable: recommendations on improvement, identification of strengths and weaknesses.)</i>	EUR 40/each
Evaluation of Proposals - Call for proposals for multi-beneficiary grant/prize (standard)	Work related to the development of the Individual Evaluation Report (IER) /Work related to the development of the Evaluation Summary Report (ESR). <i>Drafting and finalisation of the report, including comments for each criterion. (if applicable: recommendations on improvement, identification of strengths and weaknesses.)</i>	EUR 90/each
Evaluation of Proposals - Call for proposals for multi-beneficiary grant/prize (complex)	Work related to the development of the Individual Evaluation Report (IER) /Work related to the development of the Evaluation Summary Report (ESR). <i>Drafting and finalisation of the report, including comments for each criterion. (if applicable: recommendations on improvement, identification of strengths and weaknesses.)</i>	EUR 170/each

Consensus meeting quarter day (not applicable to Accelerate Call)	Attendance at the consensus meeting for the final review of the proposals. <i>Presentation of their comments and scores by experts, facilitation by the rapporteur, consensus on comments and scoring. Final agreement on the ranking of the proposals.</i>	EUR 85
Consensus meeting half a day	Attendance at the consensus meeting for the final review of the proposals. <i>Presentation of their comments and scores by experts, facilitation by the rapporteur, consensus on comments and scoring. Final agreement on the ranking of the proposals.</i>	EUR 170
Consensus meeting full day (not applicable to Accelerate Call)	Attendance at the consensus meeting for the final review of the proposals. <i>Presentation of their comments and scores by experts, facilitation by the rapporteur, consensus on comments and scoring. Final agreement on the ranking of the proposals.</i>	EUR 350

Investment committee's tasks and fees:

Type of task	Description tasks	Fee
Standard Due Diligence	Review and analysis of the documents provided and preparation of a written report to qualify the opportunity. <i>Redaction of a written report, including analysis of the business, recommendations, strengths, weaknesses, risks on the market, new entrants, etc.</i>	EUR 1 500
Jury evaluation	Participation as a juror during an event (attendance of the event and evaluation report). Assessment of pitch/presentation, incl. Final review and final scoring for the winner(s).	EUR 300
Investment Committee Session	Participation in the Investment Committee (preparation, reading due diligence reports, and rating)	EUR 500
Complex Due Diligence	Review and analysis of the documents provided and preparation of a written report to qualify the opportunity, including documentation check, interview with start-up,	EUR 3 000

	customer, and investor. <i>Redaction of a written report, including analysis of the business, recommendations, strengths, weaknesses, risks on the market, new entrants, etc.</i>	
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Selection Criteria

External evaluators and rapporteurs are selected from the EIT Manufacturing database of External Experts which is compiled from an open Call for Experts.

The four-eyes principle and the segregation of duties are implemented in the assessment of all received applications and in the selection of profiles for a specific call, according to the following criteria (additional criteria might be applied):

Inno-to-Market

- Criteria 1 Experience in the manufacturing domain

- Criteria 2 Knowledge about (at least) 1 of our thematic areas

- Criteria 3 Experience in evaluating and/or supporting the launch of innovation to the market

Education & Training

- Criteria 1 Experience in the manufacturing domain

- Criteria 2 Expertise working with KTI and innovation issues

- Criteria 3 Experience in education activities

RIS

- Criteria 1 Same as Edu/Inno (depending on the type of projects)

- Criteria 2 Same as Edu/Inno (depending on the type of projects)

- Criteria 3 Same as Edu/Inno (depending on the type of projects)

- Criteria 4 Knowledge of the priorities and needs of RIS countries

Specific criteria for the “Accelerate” call for proposals (focus on Equity investment in startups)

Pre-selection and Technical Due Diligence

- Criteria 1 Experience assessing and working with startups

- Criteria 2 Knowledge about (at least) 1 of our thematic areas

- Criteria 3 Experience in manufacturing corporates

- Criteria 4 Understanding of industrial tech

Commercial Due Diligence

Criteria 1	Expertise assessing startups in commercial due diligence
Criteria 2	Knowledge about (at least) 1 of our thematic areas
Criteria 3	Experience in start-up investments
Criteria 4	Understanding of private investment

Investment Committee

Criteria 1	Experience in start-up investment management
Criteria 2	Knowledge about (at least) 1 of our thematic areas
Criteria 3	Understanding of private investment
Criteria 4	Understanding of industrial tech

Filter applied – no researcher and no academic

Each Criteria is scored on a scale from 1 to 5

The overall threshold is 3

Scoring grid

1	Extremely poor or None
2	Bad
3	Average
4	Good
5	Excellent

The compliance with the principles of transparency, non-discrimination, equal treatment and absence of conflict of interest will be ensured.

Eligibility Check – Upon reception of an application, a check must be made to determine if the applicant's profile satisfies the needed characteristics defined in the "What we are looking for" section.

EIT Manufacturing reserves the right to contact only the Evaluators and Rapporteurs selected according to the criteria outlined in this document.

EIT Manufacturing reserves the right to retain the supplier's profile for a maximum of 5 years in order to contact them for potential service opportunities.

It is the responsibility of the supplier to ensure their profile information is up to date with their current level of knowledge and expertise.

Confidentiality

Confidential Information means any data and information, such as but not limited to proposal / technical/financial and/or commercial information that EIT Manufacturing, its Affiliates or representatives may disclose directly or indirectly, whether in writing or any other form, to the expert evaluator or rapporteur for the performance of the Services of evaluating submissions to Calls for proposals. Confidential information will not be considered any information that (i) was known publicly at the moment of the evaluator's or rapporteur's appointment or (ii) becomes known publicly through no action or fault of the expert evaluator or rapporteur.

The expert evaluator or rapporteur will also treat as confidential and process any personal data contained in the information provided by EIT Manufacturing 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 repealing Directive 95/46/EC (General Data Protection Regulation).

During the period beginning on the Effective Date of the services contract signed by the expert evaluator or rapporteur and the EIT Manufacturing and continuing for a period of five (5) years thereafter (the "Confidentiality Period"), The expert evaluator or rapporteur agrees not to: (i) use EIT Manufacturing's Confidential Information for any purpose other than for the Service; and (ii) disclose EIT Manufacturing' Confidential Information to any third party. The expert evaluator or rapporteur also agrees to destroy or return any information received from EIT Manufacturing during the performance of the Services, unless and to the extent that is required by law.

Each expert evaluator or rapporteur will have to sign the following declaration by entering into contractual relationship with EIT Manufacturing:

Declaration of confidentiality

- I will treat confidentially any information and documents, in any form (i.e. paper or electronic), disclosed in writing or orally in relation to the proposed assignment and/or the performance of the contract, and process any personal data 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 repealing Directive 95/46/EC (General Data Protection Regulation).
- I am fully aware of my obligations, inter alia in terms of confidentiality and personal data protection arising from my appointment as an expert evaluator or rapporteur by EIT Manufacturing.
- I will undertake to observe strict confidentiality in relation to my services as follows:
 - I will not use or disclose, directly or indirectly, confidential information or documents for any purpose other than fulfilling my obligations under the contract without prior written approval from EIT Manufacturing.

- I will not discuss my work with others, including other expert evaluator or rapporteur or staff not directly involved in the evaluation process.
- I will not communicate outside EIT Manufacturing any confidential information that is revealed to me or that I have discovered. I will not make any adverse use of information given to me.

I shall continue to be bound by these undertakings after completion of my services unless this disclosure of confidential information is required by law.

- If material/documents/reports/deliverables are made available to me either on paper or electronically, I agree to be held personally responsible for maintaining the confidentiality of the documents or electronic files sent and for returning, erasing or destroying all confidential documents or files on completing my services as instructed.

Conflict of interests

As an expert evaluator or rapporteur, you must be independent and without any direct or indirect linkage to any organization participating in the Call for Proposals which you are evaluating in order to ensure the equal and fair treatment of each proposal submitted. More specifically, you must avoid any circumstance that will put you in a conflict of interest. A conflict of interests exists pursuant to Article 61 FR where the impartial and objective exercise of the functions of an expert evaluator or rapporteur, is compromised for reasons involving family, emotional life, political or national affinity, economic interest or any other direct or indirect personal interest.

Each expert evaluator or rapporteur will have to sign the following declaration by entering into contractual relationship with EIT Manufacturing:

Declaration of no conflict of interest

- I do not have any conflict of interest in the meaning of para. 3 Article 61 FR¹, personal or professional, that may negatively affect my evaluation and assessment regarding the submissions for the Call for proposals for which I am providing my services.
- I undertake to inform EIT Manufacturing immediately if I discover any potential conflict of interest at any stage of the evaluation procedure for the Call for proposals. In such a case, I will immediately abstain from participating further in the evaluation process and ask for my replacement.

¹ Regulation (EU, Euratom) 2018/1046 of the European Parliament and of the Council of 18 July 2018 on the financial rules applicable to the general budget of the Union, amending Regulations (EU) No 1296/2013, (EU) No 1301/2013, (EU) No 1303/2013, (EU) No 1304/2013, (EU) No 1309/2013, (EU)

No 1316/2013, (EU) No 223/2014, (EU) No 283/2014, and Decision No 541/2014/EU and repealing Regulation (EU, Euratom) No 966/2012

Data privacy

The EIT Manufacturing processes the personal data submitted by the applicants as part of the application (names, CVs, professional experience, declarations, addresses, etc.), in any submitted supporting document at any stage in the selection process of the Experts (alternatively Rapporteurs) and communication related thereto. The purpose of this processing operation is to assess the suitability of candidates as evaluators or rapporteurs for evaluating submissions for Call for proposals and to administer the documentation related to the selection and the appointment as evaluators or rapporteurs, if selected. This includes also the processing of the submitted data for related administrative aspects, such as e.g. payments, reimbursements, etc.

During this processing, the personal data will be made available to selected staff working on the specific Calls for proposals, to Finance department, and to the Legal Service. Further, it will be made accessible to the members of the Team who will select the evaluators or rapporteurs working for EIT Manufacturing or its subsidiaries. Lastly, it may also be shared with other parties in the context and purpose of audits, inspections and internal investigations, be they internal or by supervisory authorities (for example EIT).

The personal data collected for this purpose will be stored for no longer than 5 (five) years following the financial discharge for the year in which the selection was finalized, in order to comply with audit obligations, unless ongoing legal proceedings, investigations or audits require their continued storage. Where the process led to the selection of an applicant, some of the documentation and personal data contained therein will be carried over into the database for evaluators or rapporteurs which is available to EIT Manufacturing personnel working on Call for proposals.

The processing is necessary to select applicants suitable to provide expert consulting to the EIT Manufacturing and to therefore enable it to perform its tasks. The legal basis being implemented and binding on the EIT MANUFACTURING's selection process of evaluators or rapporteurs is your consent through the application process and the execution and management of contracts we might have with you if selected and appointed. The applicable legal framework for data protection purposes for this processing of personal data is 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 repealing Directive 95/46/EC (General Data Protection Regulation) and the French data protection act (Loi informatique et libertés).

The applicant has the right at any time to request access to, rectification, restriction or erasure of their personal data. To exercise these rights, request assistance in their exercise or questions thereto, or file a complaint, they may contact the data controller, or the Data Protection Officer of the EIT MANUFACTURING. They also have the right to address themselves to the French data protection

authority (CNIL) to lodge a complaint. The controller is the EIT MANUFACTURING, and can be contacted by email at support@eitmanufacturing.eu

The Data Protection Officer can be reached at dpo@eitmanufacturing.eu

The French Data Protection Authority (CNIL) can be contacted at <https://www.cnil.fr/fr/contacter-la-cnil-standard-etpermanences-telephoniques>