Call Guidelines – DRAFT

Business Plan 2023 – 2025
EIT Manufacturing Call 2024 for Education proposals

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Index

Abbreviations

BP	Business Plan
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
ESR	Evaluation Summary Report
SO	Strategic Objectives
EC	European Commission
CLC	Co-Location Centre
EU	European Union

Key words

Activity	Everything that EIT Manufacturing does is organized into Activities. Each Activity belongs to one Segment, each Segment to one Area. Each Activity should contribute to the integration of the knowledge triangle of innovation, education, and business creation.
Activity Leader	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.
Area	EIT defines several areas in which it operates: Education; Innovation and Research; Entrepreneurship; Communication, Dissemination and Outreach; Regional Innovation Scheme; and Management and Coordination.
Business Plan	The document specifying 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.
Business Agreement	Previously "Financial Sustainability Agreement".
Call for Proposals	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 allocation of additional funding not initially included in the respective BP (during the year of the BP implementation).

Call Guidelines	Document where the terms, conditions, and criteria of any call for proposals are defined and stated according to the principles of transparency, equal treatment, open competition, and sound procedural management.
Call Report	Document summarising the results of the call and its most important outputs, including the ranking list.
CLC	Co-Location Centre / affiliate of EIT Manufacturing
Deliverable	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, a software release upon which the end product/solution or service depends) that must be produced during the activity lifecycle.
EIT Manufacturing partner	A member of the EIT Manufacturing Association (Core or Associate Partner pursuant to the Article of Association conditions)
End-user	The end-user in the context of EIT Manufacturing activities is defined as the organization that uses a solution (product, service or methodology) to fulfill a specific need or achieve a business objective in a real-world environment. The end-user may be the final consumer of the solution, or it may be an intermediary that utilizes the solution to provide value to their customers.
Evaluation Process	Process by which EIT Manufacturing examines the quality of a proposal to decide if it should receive EIT funding.
Evaluation Panel	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.
Evaluation Report	A written report, covering all proposals and the process behind the individual evaluation results from the consensus meetings (an evaluation panel comprising evaluators and a rapporteur) that is forwarded to the EIT Manufacturing Management Team.
Evaluation results list	List of proposals in order of scoring, based on the evaluation process results.
Evaluation Summary Report	Following the completion of the evaluation process, a final Evaluation Summary Report is made for each proposal, summarising the strengths, weaknesses, risks, and commercial and social value of the proposal. It is an expert deliverable drafted by the rapporteur and reflecting the expert consensus on a specific proposal.

Individual Evaluation Report	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.
Key performance indicators (KPIs)	Set of indicators used to measure how effectively a consortium is meeting the objectives. There are 2 sets of KPIs: the EIT Core KPIs defined by the EIT that reflects 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. KPIs need to be reported.
KIC	"Knowledge and Innovation Community" – EIT Manufacturing is one of the 9 KICs that operate under the regulations of EIT.
Milestone	Control points to chart progress. They may correspond to the completion of a key deliverable that allows the next phase of work to begin.
Model Grant Agreement	Model Grant Agreement is used in Horizon Europe programme financed by the European Commission.
Panel review	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 reach a consensus about their scoring and ranking. The results of the panel review are set out in the minutes and the call report.
Pillar	Used as a synonym of Area
Ranking list	Ranking of proposals selected for funding by the EIT Manufacturing Management Team.
Rapporteur	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

Call for Proposals - Main Features	
Dates	*Call opening:* 19th September 2023 10:00 CEST *Call closing:* 20th November 2023 23:59 CEST *Eligibility and admissibility check:* by 22 November 2023 *Evaluation of proposals:* January 2024 *Communication of results:* February 2024 *Selected activity proposals starts:* June 2024
Introduction	The education call main objective is the development of skills and capacity building in European Manufacturing. It is composed of 3 main topics: Sustainability, Digitalization and Future Trends; and 3 Education segments: Skill-driven learning, Education for Transforming Organizations and Engage Pupils and society
Total budget allocated to this call	4.750.000 EUR (TBC)
Link to the submission portal	New Organization? Register here New person?[1] Register here [Log in to the submission too](Log)l.
List of documents to be submitted	• Application form to be completed in the submission tool. • Business Owner Deck • Instructional Designer Deck

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[1] *It applies to new persons of registered organizations*

	• GANTT chart
List of documents to take into consideration	• Horizon Europe Model Grant Agreement • EIT Manufacturing Strategic Agenda • Appeal procedure • List of KPIs • Eligibility of expenditures • Call Q&A • Financial Support Agreement • Activities Monitoring Process Guidelines • Business Agreement • Digital Content Agreement • Annex A – Basic Concepts and Glossary Education • Annex B – EIT Manufacturing Upskilling and Reskilling Quality System and Competency Model – Manual • EIT Label Handbook
Evaluation criteria	*Evaluation criteria assessed by the independent experts:* • Excellence, novelty, and innovation, • Impact and financial sustainability, and • Quality and efficiency of the implementation, including sound financial management • Strategic fit, • European dimension.

2. General conditions

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. Our aim is not only to adapt to this revolution, but to lead it. To do so, we need to overcome value network fragmentation and bring stakeholders together. We need to make better use of our knowledge and our strengths to create value and deploy agile mechanisms to accelerate and steer innovation, shaping the future role of manufacturing in our society. With the needs, concerns and ideas of 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 of present and future generations. In 2023, EIT Manufacturing has launched a Call for Proposals (for Activities to be executed starting in 2024) always keeping in mind and building upon the experiences and lessons learnt from previous years. Our goal is to drive the community one step further in the achievement of its long-term goals. Activities of EIT Manufacturing are aimed towards achieving the strategic objectives of the Knowledge and Innovation Community (KIC). The programmes are the instruments to implement the activities of EIT Manufacturing. Proposals addressing the Call 2024 will be solicited through an open and transparent call process open to all entities who are eligible for funding under the Horizon Europe programme. This document describes the goals and the process of the call, as well as an outline of how an ambitious, convincing and integrated portfolio of Activities will be selected. The chosen activities will start in June 2024.

All activities of EIT Manufacturing serve to achieve the strategic objectives:

- Strategic objectives of Putting people at the center of manufacturing innovation:
- Accelerating green manufacturing;
- Fostering competitive and resilient manufacturing.

The Strategic Objectives of EIT Manufacturing contribute to solve the most pressing challenges for a greener and more competitive European manufacturing and society.

All the activities address transversal topics within manufacturing such as:

- Smart Factory,
- Sustainable Manufacturing,
- Business Processes, in line with strategic directions of EIT Manufacturing.

Further details on the strategic focus of the Education Thematic Pillar are given in Section 3.

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 Eligible entities

Entities eligible to participate[2]

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[3] have been met, along with any other conditions laid down in the specific call topic.

A 'legal entity' means any natural or 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 own 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:

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[2] 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.* Please check also the related list of Frequently Asked Questions. It is progressively updated as soon as further guidance is available. You can find an indicative – non-exhaustive – list of affected entities (i.e. public interest trusts and entities maintained by them) under this link.

[3] 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)

- 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.

- the Outermost regions linked to the Member States of the European Union.
- the countries associated to Horizon Europe and the low- and middle-income countries[4];

Consortium composition

Only legal entities forming a consortium are eligible to participate in actions provided that the consortium includes <u>at least 3 legal entities independent from each other and each established in a different country as follows:</u>

- at least 1 independent legal entity established in a Member State; and
- at least 2 other independent legal entities, each established in different Member States or Associated Countries.

Please consider that:

- for applicants based in the United Kingdom their participation follows the conditions described <u>here</u>
- for applicants established in Switzerland their participation is not currently covered by an EU agreement and, as a matter of consequences, applicants established in Switzerland are not eligible for EU funding.

All EIT Manufacturing partners are eligible to apply for funding, **nevertheless, an entity does not need to be an EIT Manufacturing partner to apply for funding.** Access to Agora, our online community platform, is provided to all entities to help build up proposal consortia.

Additional call specific conditions apply and are explained in section 3 and specific conditions for consortium composition are described in section 3.4.

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[4] See the Horizon Europe List of Participating Countries on the Portal for an up-to-date list of these countries

2.4   EIT Manufacturing membership

All entities of selected proposals are asked to be part of the EIT Manufacturing community and to choose one of the following partnership model (and related annual fee) when initiating their activities:

<u>Core partner (voting right, privileged access to services, representatives in the KIC governance)</u>

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

<u>Associated partner (no voting right, restricted access to services)</u>

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

More information on the partnership models is available on the website[5].

Please note that the total maximum EIT funding per year for all entities participating in the 2024 Calls is € 1,500,000.

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

At most, the following number of Linked Third Parties/affiliated entities of a Core Partner may receive funding per year through the 2024 Calls:

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

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[5] https://www.eitmanufacturing.eu/partners/partnership-models/

[6] 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.

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

- the affiliated entity carrying out the work shall be the 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.

2.5 Applicants' registration process

Before submitting a proposal, all applicants (Activity Leader and consortium members) must register on the EU Participant Portal and obtain a PIC number and on the PLAZA/NETSUITE submission tool[7]. If you have already participated in activities funded by the EU before and have your PIC number validated, you can proceed with the registration of your organisation on the submission tool.

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). If this is your first time participating in an EU-funded activities or your organisation cannot access your already validated PIC and there are updates to the 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.

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.

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[7] Links to the submission tool are provided on page 7.

2.6 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 extent possible, a gender balance at all levels of personnel assigned to the proposal, including at the supervisory and managerial levels.

2.7 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[8]). Proposals are expected to be designed in a way that do not significantly harming to any of the six environmental objectives of the EU Taxonomy Regulation.

a)   climate change mitigation;

b)   climate change adaptation;

c)   the sustainable use and protection of water and marine resources;

d)   the transition to a circular economy

e)   pollution prevention and control;

(f)   the protection and restoration of biodiversity and ecosystems.

2.8 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 achieve 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 with:

- human rights and protection of human beings
- animal protection and welfare
- data protection and privacy
- health and safety
- environmental protection
- artificial intelligence

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

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[8] https://eur-lex.europa.eu/legal-content/EN/TXT/?uri=celex:32020R0852

2.9   Open science and social 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. Open science practices include early and open sharing of research (for example through preregistration, registered reports, preprints, or crowd-sourcing); research output management; measures to ensure reproducibility of research outputs; providing open access to research outputs (such as publications, data, software, models, algorithms, and workflows); participation in open peer-review; and involving all relevant knowledge actors including citizens, civil society and end users in the co-creation of R&I agendas and contents (such as citizen science).

Please note that this does not refer to outreach actions that may be planned as part of communication, dissemination, and exploitation activities. If you believe these practices are appropriate for your proposal, please acknowledge it in the submission phase.

Your proposal could be contributing to the **social sciences or/and the humanities dimension** of EIT Manufacturing. If you believe this dimension is appropriate for your proposal, as described in the Horizon Europe Programme Guide, please acknowledge it in the submission phase.

3. Call specific conditions

The Education Pillar aims to fully contribute to the EIT Manufacturing Strategic Agenda and its anticipated impact. Education focuses on humans: engage, connect and empower them to become the backbone of a strong European Manufacturing Innovation Community; a prosperous and inclusive society.

Education is key to pursue the strategic objectives of EIT Manufacturing and it suppports the attainment of the Strategic Development Goals (SDGs).

Furthermore, Education contributes in supporting business and innovation along Digitalization, Green transition, increase of Resilience, and other relevant trajectories in Manufacturing.

The 2024 Education call is costructured around two axes: topics and segments. The topics define the main thematic or subjects of the proposal (detailed in chapter 3.1), while segments outline the types of learning and education programmes to be offered (detailed in chapter 3.2).Proposals should select one topic and one segment to apply to.

Table 1

Topics Segments	Skills-Driven Learning	Transforming organizations	Engage Society and Pupils
Topic 1: Sustainability - Skills for identifying and applying enabling technologies for sustainable manufacturing	✓	✓	✓*
Topic 2: Digitalization - Identification and development of skills to define and execute a digital transformation roadmap	✓	✓	✓*
Topic 3: Future trends -Upskilling and reskilling in Re-manufacturing and critical resources	✓	✓	

*Proposals under the segment "Engage Society and Pupils" should be aligned with one of the 2 main topics: sustainability and digitalization. However, considering the target group, these proposals should not achieve the same level of complexity and skills.

In 2024, the focus will be on maximizing the impact of education activities by transforming their results into reusable, commercializable, and widely distributed assets for a diverse range of learners or companies. Education initiatives should leverage highly innovative education and training solutions, as well as capitalize on available assets, resources, programmes, networks, and collaborations developed in previous years (refer

to Annex A. Education Pillar Basic Concepts and Glossary for further information on current assets).

EIT Manufacturing has set ambitious objectives in the Strategic Agenda, and 2023-2025 phase is crucial to a) scale up and ensure that KPIs such as the number of individuals upskilled or re-skilled, can reach the targets and b) demonstrated that a win-win business collaboration can be established with the partners to ensure both benefits for them and for the manufacturing community, and the financial sustainability of KIC, so that it can continue to pursue its mission beyond the EIT Funding.

3.1 Call thematic and expected results

Topic 1: Sustainability - Skills for identifying and applying enabling technologies for sustainable manufacturing

Purpose

To aid companies in achieving their sustainability goals while enhancing their manufacturing processes, skills for identifying and using enabling technologies for sustainable manufacturing are necessary. Enabling technologies can be used to diminish the environmental impact of industrial activities while increasing productivity and efficiency. Moreover, environmentally-minded personnel can identify opportunities that may boost companies' long-term competitiveness and resilience.

The success of a company or organization's efforts to improve its environmental sustainability depends on the skills of its personnel. Firstly, it is essential that personnel have a solid understanding of the manufacturing process and the technologies involved. By developing these skills, personnel will be better equipped to identify ways to improve environmental sustainability within the company.

Furthermore, it is crucial for personnel to stay up to date with the latest market developments in clean, energy-efficient, and environmental technologies. This way, they can keep abreast of the latest innovations and integrate new technologies into the company's manufacturing process.

Proposals under this topic relate to EIT Manufacturing Strategic Objectives "put people at the center of manufacturing innovation" and "accelerate green manufacturing"

Topic description

While multiple tools and solutions emerge in the market that can support the assessment and deployment of sustainable manufacturing solutions, personnel are ultimately responsible for assessing and evaluating their relevance within the broader company and operational context. Proposals under this topic should aim to upskill the manufacturing workforce, enabling them to identify potentially innovative solutions and perform the appropriate cost/benefit analyses to make informed choices regarding the adoption of sustainable technologies.

Therefore, the proposals are expected to cover several of the following skills:
- Leadership skills to inspire employees to embrace sustainability as a core value,
- Project management skills to plan and manage sustainable manufacturing activities,
- Technical skills to identify opportunities to reduce resource consumption and waste along the full product development, service, and end of life cycle,
- Analytical skills to measure sustainability in factories and monitor the implementation of enabling technologies

Submitted proposals should address the following implementation barriers and provide solutions to overcome them:
- Bridging the gap between highly skilled advanced research and less advanced technical education, while facilitating effective knowledge transfer from academia to industry.
- Addressing the technical complexity of enabling technologies, mitigating any fear of failure or perception of high risk that may discourage their adoption.
- Increasing awareness of the goals and benefits of sustainable manufacturing, fostering incentives for its widespread adoption.

Proposals under this topic are expected to develop upskilling programmes based on one of the following segments Skill Driven Learning, Education for transforming organizations and Engage Society and Pupils, described in chapter 3.2.

Proposals focusing on the following industry segments and/or technologies will be positively evaluated: Automotive – extra focus on batteries and hydrogen; Machinery & Equipment – extra focus on batteries and robotics; and Electronics & Photonics – extra focus on Semiconductors, Solar cells.

Proposals under this topic should clearly demonstrate how new teaching, learning and upskilling methodologies and approaches add to the State of the Art, clearly identifying and illustrating a market analysis, whilst addressing the following expected outcomes:

- Development of **life cycle assessment and lean production skills for CO2 neutral manufacturing** for any hierarchical level or functional area of the company/organization.
- **Development of a holistic sustainability view** of product design principles, production line, and the use of sustainable materials.
- Correct application and use of **standards and best practices** for the manufacturing industry and capability building for compliance with EC/national/regional regulations and directives.
- Improved use of data to produce relevant **metrics and toolkits** to enhance decision-making for sustainable manufacturing
- (Applicable to "engage" segment) increased awareness about the importance of environmental sustainability in the manufacturing industry.

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

- Increased adoption of sustainable and energy-efficient enabling technologies in the manufacturing industry, leading to reduced environmental impact.
- Achievement of sustainability goals outlined in the Green Deal strategy, fostering a more sustainable manufacturing sector.
- Upskilled manufacturing workforce able to address new environmental challenges in the manufacturing industry and drive sustainable practices in the industry.

Topic 2: Digitalization - Identification and development of skills to define and execute a digital transformation roadmap

Purpose

To allow companies to enhance their manufacturing operations by utilizing digital technology, it is important to identify and develop the skills required to establish and implement a digital transformation roadmap at the production level. The identification and development of these skills are crucial for the manufacturing industry to maintain competitiveness and relevance in today's market. Embracing digital transformation,

enables companies to streamline operations, improve products quality, and enhance agility, resilience, and overall success.

Executing digital transformation roadmaps at operational level requires personnel with suitable digital competencies. Digital transformation involves integrating digital technologies into various aspects of a business to increase efficiency, reduce costs, and improve overall performance. In the context of production-level digital transformation, this typically entails utilizing automation, data analytics, artificial intelligence, and other advanced technologies to optimize production processes, increase output, and improve product quality.

Proposals under this topic relate to EIT Manufacturing Strategic Objectives "put people at the center of manufacturing innovation" and "foster competitive and resilient manufacturing".

Topic description

With the right skills and mindset, the manufacturing sector can successfully embrace the implementation of a digital transformation roadmap and achieve a successful digital transition at organization level.

Proposals should aim to upskill the manufacturing workforce, enabling them to support the development and execution of digital transformation roadmaps by:
- Enabling line managers to identify and define the necessary skills required for establishing and implementing of a digital transformation roadmap,
- Helping employees assimilate and identify the benefits of digitalization at all levels within the company and effectively communicate these advantages.
- Equipping operators with cross-sectoral skills that combine digital and project management skills to develop a roadmap aligned with the company's strategy.
- Developing of critical thinking skills to interpret data for informed decision-making.
- Providing the necessary skills for the workforce to operate meta-factories, which involve data analytics, understanding and collaborating with artificial intelligence, automation, and cybersecurity

Submitted proposals should address the following implementation barriers and provide solutions to overcome them:
- Lack of standardized structures or guidelines for developing roadmaps, hindering effective planning and implementation.

- Limited availability of digital technical knowledge and on-the-job training opportunities for engineers, impeding their ability to adapt to new technologies.
- Challenges arising from inadequate knowledge of data management and concerns regarding cybersecurity, impacting the successful implementation of digital solutions.

Proposals under this topic are expected to develop upskilling programmes based on one of the following segments Skill Driven Learning, Education for transforming organizations and Engage Society and Pupils, described in chapter 3.2.

Proposals focusing on the following industry segments and/or technologies will be positively evaluated: Automotive – extra focus on batteries and hydrogen; Machinery & Equipment – extra focus on batteries and robotics; and Electronics & Photonics – extra focus on Semiconductors, Solar cells.

Expected outcomes & impacts

Proposals under this topic should clearly demonstrate how new teaching, learning, and upskilling methodologies, and approaches add to the State of the Art, clearly identifying and illustrating a market analysis, whilst addressing the following expected outcomes:
- Increase the **company's change management** and its capacity to develop digital transition roadmaps.
- Improve **digital technologies related competencies and company's internal sources of information** with digitalization potential, to improve the enterprise resource planning or business process management.
- (Applicable to "engage" segment) foster the understanding of digital technologies in the manufacturing industry and their impact in society

Proposals under this topic should set out a credible pathway for the activity to contribute to one or more of the following expected impacts:
- Enhanced awareness and demystification of the advantages and benefits of digital transformation at all levels of personnel in European manufacturing companies.
- Increased adoption of digital technologies, fostering a culture of digital transformation across European manufacturing companies.
- Improved competitiveness of European manufacturing companies in the global economy through effective utilization of digital technologies and innovative practices.

Topic 3: Future trends - Upskilling and reskilling in Re-manufacturing and critical resources for Circular Economy

Purpose

Remanufacturing involves repairing, refurbishing, and upgrading products and assets to prolong their lifespan, minimize resource usage, and reduce environmental impact. Additionally, access to critical raw materials is a priority for the EU in achieving strategic autonomy and supply chain resilience. Therefore, upskilling and reskilling personnel in technical remanufacturing skills and resource management are essential for the EU manufacturing's green transition. However, the lack of vision, knowledge of best practices, guidelines, and conflicts with existing business models pose implementation challenges. To overcome these barriers, there is a need to raise awareness and develop foundational skills in remanufacturing and critical resources management.

Proposals under this topic relate to EIT Manufacturing Strategic Objectives "put people at the center of manufacturing innovation", "accelerate green manufacturing" and "foster competitive and resilient manufacturing"

Topic description

The development of technical skills for remanufacturing encompasses various areas of expertise. This includes understanding remanufacturing processes, materials and technologies, parts and components, circular data models, reverse engineering, material sciences, and product design. Additionally, resource management skills play a crucial role in sustainable remanufacturing, including critical resource management, life cycle assessment, resource conservation, waste reduction, sustainable sourcing, sustainability assessment, and supply risk assessment and management. These skills collectively contribute to efficient and environmentally-friendly remanufacturing practices.

To facilitate the adoption of remanufacturing, proposals under this segment should focus on the following key areas:
- Enhancing understanding of circular economy principles at the operator level.
- Developing expertise in materials science, business acumen, and supply chain management to support effective remanufacturing processes.
- Equipping the workforce with the ability to prepare, draw, and design products, as well as conduct life cycle assessments and improve product design for remanufacturing.

- Promoting knowledge of legal frameworks and policies at the European level that are conducive to supporting and facilitating remanufacturing initiatives.

Furthermore, submitted proposals should offer innovative solutions to overcome the following implementation barriers in remanufacturing:
- Lack of knowledge and vision, including a lack of clear definitions and understanding of the needs and benefits of remanufacturing.
- Insufficient focus on integrating remanufacturing in jobs and skills development initiatives, hindering the growth of a skilled remanufacturing workforce.
- Prevailing business-as-usual mindset and accountability issues across the manufacturing community, as well as within individual companies, which can impede the adoption of remanufacturing practices.

Proposals under this topic are expected to develop upskilling programmes based on one of the following segments Skill Driven Learning and Education for transforming organizations, described in chapter 3.2.

Proposals focusing on the following industry segments and/or technologies will be positively evaluated: Automotive – extra focus on batteries and hydrogen; Machinery & Equipment – extra focus on batteries and robotics; and Electronics & Photonics – extra focus on Semiconductors, Solar cells.

Expected outcomes & impacts

Proposals under this topic should clearly demonstrate how new teaching, learning, upskilling methodologies and approaches add to the State of the Art, clearly identifying and illustrating a market analysis, whilst addressing the following expected outcomes:
- Enhanced knowledge of design for remanufacturing and recycling, enabling the development of products that are easier to remanufacture and recycle.
- Improved utilization of materials and resources, including a comprehensive understanding of future critical raw materials, ensuring responsible and sustainable use.

Proposals under this topic should set out a credible pathway for the activity to contribute to one or more of the following expected impacts:
- Successful implementation of new business models that lead to the establishment of new production lines, creation of new jobs, and increased productivity and efficiency.

- Enhanced sustainability and resilience across the supply chain, achieved through reduced carbon footprint, minimized environmental impacts, and other negative externalities, with the inclusion of life cycle assessment practices.

3.2 Call segments

Segment 1: Skills-driven learning

This segment is available for all topics

Target group

- Manufacturing employees and professionals, long-life-learners
  It is recommended to focus on a specific target group in order to ensure that the learning experience is tailored to be the most effective

Segment description

This segment focuses on the creation and delivery of active learning experiences tailored to develop specific skills, targeting individuals. These learning experiences must combine asynchronous digital learning with synchronous learning such us workshops, teaching and learning factories, seminars and conferences, following a "learning by doing" approach.

Each learning programmes must include a **minimum of 8 hours of synchronous and hands-on activities** as well as a **minimum of 10 hours of digital training** (digital nuggets and learning paths in Skills.move). The overall workload of the learning programmes must be **at least of 1 ECT** (European Credit Transfer and Accumulation System, about 25 hours of workload).

Innovative teaching and learning methodologies should be employed, including but not limited to digital nuggets, learning paths, Teaching Factories, Learning Factories, immersive experiences, simulations, case studies, challenge-based learning, and gamification. The programme must integrate an innovation and business perspective, aligning with the EntreComp framework and connecting to relevant enabling technologies, manufacturing applications, and eventually business models.

Proposal must clearly identify the target groups, entry-level competencies, learning outcomes, and final assessment of acquired competencies in the submission form.

Additionally, courses in this segment must comply with the requirements of the EIT Manufacturing Upskilling and Reskilling Quality System and Competency Model as outlined in the Manual (Annex B), following EIT Label Handbook. The activity should

present a coherent set of courses to be included in the EITM Non-Degree Label Programme to achieve the related KPIs: EITHE 07.1 and 07.2

Results of the activity should not include non-commercial license such us modified under Creative Commons License CC BY-NC, CC BY-NC-SA. It should also ensure that the software and hardware used for learning purposes are easily accessible to wide share of users, either through open-access options or affordable pricing.

Moreover, proposals under this segment must:

- Include a train-the-trainer programme as an output
- Ensure the rollout of the training to a wide range of learners beyond the pilot phase. The training courses should not be overly targeted only to the needs of the manufacturing company(ies) in the consortia but need to be transferable and adaptable to have commercialization potential.
- Guarantee that the asynchronous training, digital learning nuggets and learning paths, can be consumed stand-alone.
- Address ONLY the target group(s) specified in the segment
- Involved an instructional designer (ID) throughout the development of the training material. The profile, proven track record and detailed information of the instructional designer should be clearly described in the proposal (see "Instructional Designer Deck"). Proven track record should not refer to previous EITM activities.
- Commit to and accept signing of the Digital Content Agreement
- Follow learning content guidelines for the development of digital content, as outlined in Annex A
- Include dissemination and communication material (logo, flyer, factsheet and footage video) as an output

Segment 2: Education for transforming organizations

This segment is available for all topics

Target group

- groups of SMEs (university students are not accepted as testers or in piloting activities)

This segment aims to support groups of small and medium-sized enterprises (SMEs) in preparing their Human Capital for a transition (digital, green, resilience, technological) through skills development. Proposals under this segment must develop training and consulting programmes for SMEs in collaboration with trusted industrial associations and clusters with strong connections with SMEs in the targeted region.

The "transform" programmes must include an initial assessment of the skill gaps, the co-design of a skills development roadmap, the assignment of training paths to the employees, the delivery and the final evaluation and assessment of the programme. These programmes should have a duration of about **20 hours** and involve **resources from different functional areas**, with a **minimum participation of 4 people per SME**.

The programme must integrate an innovation and business perspective, aligning with the EntreComp framework and connecting to relevant enabling technologies, manufacturing applications, and eventually business models.

Proposal must clearly identify the target groups, entry-level competencies, learning outcomes, and final assessment of acquired competencies in the submission form.

Additionally, courses in this segment must comply with the requirements of the EIT Manufacturing Upskilling and Reskilling Quality System and Competency Model as outlined in the Manual (Annex B), following [EIT Label Handbook](#). The activity should present a coherent set of courses to be included in the EITM Non-Degree Label Programme to achieve the related KPIs: EITHE 07.1 and 07.2

Results of the activity should not include non-commercial license such us modified under Creative Commons License CC BY-NC, CC BY-NC-SA. It should also ensure that the software and hardware used for learning purposes are easily accessible to wide share of users, either through open-access options or affordable pricing.

Moreover, proposals under this segment must:

- Demonstrate, during proposal phase, the preliminary engagement from at least 6 (S)MEs committed to undertake the trajectory and target **at least 22 "to be transformed companies"** during the activity execution
- Include a "Transformation and training service" as final output that can be offered as a package to SMEs by the business owner(s) after activity's conclusion.
- Involved local industrial associations and clusters to ensure the successful roll out and scale up of the programme

- Address ONLY the target group(s) specified in the segment.
- Involved an instructional designer (ID) throughout the development of the training material. The profile, proven track record and detailed information of the instructional designer should be clearly described in the proposal (see "Instructional Designer Deck"). Proven track record should not refer to previous EITM projects.
- Commit to and accept signing of the Digital Content Agreement
- Include dissemination and communication material (logo, flyer, factsheet and footage video) as an output

Segment 3: Engage society and pupils

This segment is available for topics 1-2

Target group

- Pupils (8-17years old), Young people (18-25 years old), girls, women, diverse/ disadvantaged groups
- Seniors (over 65 years old) in the manufacturing industry
- Master and PhD Women Students and Professional/employee Women

Segment description

This segment aims to engage a wider population, encourage the use of their talents, and foster active participation in manufacturing by cultivating innovation and entrepreneurial skills. It addresses target groups of future potential workers, such as pupils, youngster or employees in other sectors, and underrepresented or marginalized groups, with a focus on addressing specific needs such as gender disparities. The objective is to provide a positive and realistic perspective on advanced, digital, and green manufacturing, emphasizing its positive impact on the environment and society. The segment seeks to expose these target groups to learning experiences that develop their skills in manufacturing, innovation, and entrepreneurship.

Proposals in this segment can focus on three main areas:

1. Proposals that raise awareness about manufacturing, stimulate creativity and passion among young generations and specific diverse and disadvantaged groups, with the goal of improving the perception of manufacturing and attracting them to manufacturing education, training, and careers. These activities should leverage existing initiatives and networks, have a wide outreach, demonstrate

valuable impact, and bring a distinct and recognizable value-added contribution from EIT Manufacturing.

2. Proposals that aim to enhance gender balance in manufacturing by strengthening the leadership and entrepreneurial skills of women already in the sector. The duration of these programmes should range from 2 weeks to 3 months, with active involvement of each individual for a minimum of 20 hours.

3. Proposals that target seniors willing to enhance their innovation and entrepreneurship skills. These activities should enable upskilling people that want to remain active on the job market and generate new businesses. Additionally, the duration of the resulting programmes should range from 2 weeks to 3 months, with active involvement of each individual for a minimum of 20 hours.

All programmes must integrate an innovation and business perspective, aligning with the EntreComp framework and connecting to relevant enabling technologies, manufacturing applications, and eventually business models.

Proposal must clearly identify the target groups, entry-level competencies, learning outcomes, and final assessment of acquired competencies in the submission form.

Moreover, proposals under this segment must:

- Be linked to one of the following main topics: sustainability and digitalization.
- Engaged teachers or representatives of the target groups
- Involve women's associations or networks (area 2)
- Involved an instructional designer (ID) throughout the development of the training material. The profile, proven track record and detailed information of the instructional designer should be clearly described in the proposal (see "Instructional Designer Deck"). Proven track record should not refer to previous EITM projects.
- Include dissemination and communication material (logo, flyer, factsheet and footage video) as an output

Synergies with other initiatives targeting the same groups and making use of Skills.move are encouraged

3.3 Duration

This call is open to proposals with different durations depending on the selected segment.

- **12 months:** Segment 3: Engage society and pupils

- **18 months:** Segment 1: Skills-driven learning; Segment 2: Education for transforming organizations;

Activities over twelve months should include an activity and yearly budget plan that covers the whole activity period and that will undergo a detailed performance and spending check every six months.

The business owner's involvement and effort in the definition and execution of the commercialisation plan, and the instruction designer and effort in the development of the learning content, which are expected to start from activity kick-off, should be described in the workplan.

3.4 Applicants profile

Additionally, to the minimum conditions for consortium composition laid down in section 2.3 and the requirements per segment in section 3.2, consortia must include entities geographically based in at least, two different EIT Manufacturing CLCs[9].

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 responsible for the commercialisation of the learning programmes resulting from the project established as a Legal Entity in a Member State or Horizon Europe Associated Country. The Business Owner serves as the main contact for EIT Manufacturing and the consortium for the Financial Sustainability agreement and is 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 for educational products**. They should possess in-depth knowledge of the target market, including its competitor and entry barriers, and most importantly a proven track record of sales and customers in the target

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[9] https://www.eitmanufacturing.eu/in-your-country/

group sector identified by the consortium. If the learning programmes are to be delivered locally, it is possible to have more than one Business Owner involved. However, all Business Owners must meet the aforementioned requirements. All these elements should be clearly described in the proposal (see "Business Owner deck" template). Not applicable for Engage segment.

- **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. This is not applicable to Segment 3 "Engage society and pupils".

3.5 Core KPIs

Every proposal **must contribute the KPI accordingly to** the minimum target indicated below. **Proposing a higher target than the minimum required but still credible and justified, will be positively evaluated.** 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 it is for the target to be achieved by the end of the activity.

KPI	Short title	Minimum Target		
		Skill-Driven Learning	Transforming organizations	Engage
EITHE08.1	Number of participants in (non-degree) education and training	250	80	200
EITHE08.2	Number of EIT RIS Participants in (non-degree) education and training	30% of 8.1	30% of 8.1	30% of 8.1
EITHE07.1	Number of graduates and participants from EIT-labelled programmes	20% of 8.1	20% of 8.1	N/A
EITHE07.2	Number of EIT RIS graduates and participants from EIT-labelled programmes	30% of 7.1	30% of 7.1	N/A

Additional requirements and information:

- It is expected that the activities achieve **at least 35%** of these KPIs' targets during the first 12 months of the activity, and the totality of them by the end of the activity.
- Proposals that aim at having active participants during the first 6 months of the activity through pilots will be positively evaluated, this must be stated in the workplan.
- RIS KPIs are not a supplementary KPIs and only reflect the RIS aspect of the core KPI.

3.6 Additional KPIs

Every activity must contribute with at least the minimum targets of the specific KPI listed below.

| KPI | Short title | Minimum Target | | |
		Skill-Driven Learning	Transforming organizations	Engage
KIC.G03	Number of digital nuggets created	40	10	10
KIC.G04	Number of digital nuggets consumed	8000	500	900
KIC.G05	Number of learning paths created	5	1	2
KIC.E01	Number of badges issued to document and testify the achievement of a learning outcome	200	64	160
KIC.E04	# of teachers (mentors or professors) involved in engage programmes	0	0	20
KIC.E05	# of pupils/target people involved in engage programmes	0	0	2000

Additional requirements and information:

- Number of digital nuggets created (KIC.G03) and Number of learning paths created (KIC.G05) must be achieved during the first 12 months of the activity, in line with activity milestones declared in chapter 3.12.
- For the other "additional KPIs", it is expected that the activities achieve at least 35% of the targets during the first 12 months of the activity.
- Proposals must not include any other KPIs than the ones listed in chapters 3.5 and 3.6

3.7 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 of the (Model) Grant Agreement[10].

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[10] https://ec.europa.eu/info/funding-tenders/opportunities/docs/2021-2027/common/agr-contr/general-mga_horizon-euratom_en.pdf

Applicants should engage in dissemination, communication and exploitation of the results of the activities.

3.8 Budget and funding

The total maximum EIT funding allocated to this call is up to 4.750.000 EUR. The amounts will be allocated according to the below estimation.

Call Segment	Indicative Budget	Maximum EIT funding per proposal
Segment 1	2.4 EUR million	Up to 400.000 EUR
Segment 2	1.6 EUR million	Up to 400.000 EUR
Segment 3	0.75 EUR million	Up to 250.000 EUR

Proposals are expected to efficiently distribute the EIT funding throughout the entire duration of the activity, taking into account the various tasks and KPI targets. Co-funding is positively assessed for activities in all the segments, and **proposals under segment 3 "Engage society and pupils" are expected to have minimum 30% co-funding rate.**

The minimum co-funding rate refers to the total activity budget. By co-funding we mean financial contribution other than EIT Manufacturing funding allocation.

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 total funding available.

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, all obligations specified in the Financial Support Agreement have been fulfilled and following the completion of final activity monitoring assessment. The latter includes successful fulfilment of all the mandatory deliverables and milestones detailed in chapter 3.12. The instalments are divided as follows:

- 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€, a Certified Financial Statement (CFS) audit will be requested prior to the payment[11]. 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

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[11] According to Art 24.2 of the Horizon Europe MGA

reaches again a cumulative EIT funding of 430,000€) 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.

3.9   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.

3.10   Business Value towards Financial sustainability

The selected activities for Education are expected to lead to the commercialization of the proposed **learning programme(s**). Therefore, each proposal should include a credible commercialisation strategy, outlining how the learning programme will reach the market and the expected impact. Only proposals under the segment "Engage Society and Pupils" with a high impact may not foresee a Business Agreement, but co-funding is still required (refer to chapter 3.8)

The education activities encompass two types of Business Agreements to manage commercialization and revenues:

> 1) Digital Content: Partners license EIT Manufacturing to commercialize the digital learning content developed in the Education Activities through Skills.move

> 2) Revenue Shares: The Business Owner(s) commits to providing EIT Manufacturing with a share of the revenues generated by the commercialization of the learning programmes

For this call, it is expected that activities combine both types of agreements, ensuring that the digital content can be sold through Skills.move, and that the overall learning programmes are rolled out to the market by the Business Owner(s).

Proposals must guarantee and commit to delivering the learning programme(s) **at least twice per year** and for a **minimum of 2 years** after the end of the activity. Additionally, they should commit to recognizing EIT Manufacturing a **minimum of 10%** of the revenue shares generated by the sales of the programmes. Activities failing to achieve the revenue targets or to deliver the learning programme(s) in the subsequent years after the activity ends will be required to pay EIT Manufacturing **5% of the revenue projections** declared in the application form as compensation for the support received by EIT Manufacturing during the activity.

To this end, proposals are requested to provide, in the submission system, their plan for delivering the programme after activity ends and the expected revenue projection for the 5 years following the activity end date. The experts will review the delivery plan and revenue projections, evaluating potential impact and the proposal's worthiness of funding (considering the overall budget).

Activities will receive support from EIT Manufacturing to help them achieve their objectives. This support acts as a counterpart for the revenue shared with EITM, ensuring that the activities have the necessary resources, guidance, and assistance to maximize their chances of success and impact.

The initial proposed financial sustainability contribution will be revised before to the activity start and during the activity implementation. It is mandatory for all applicants to sign a Business Agreement with EIT Manufacturing by the 10th month of the activity. All proposals must include a formal Milestone for the signature of a Business Agreement in their work plans, no later than month 10. The Business Agreement will be monitored for a minimum of five years after the end of the activity.

3.11 Activity reporting

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) according to the achievement of milestones, deliverables and KPIs.

The monitoring at the end of each quarter will cover several aspects relating to the activity implementation including, but not limited to: achievement of milestones, 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 Business Agreement (please refer to Section 3.10) and the KPIs targets (please refer to Section 3.5 and 3.6) 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.

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.

For more information about the monitoring process, you can refer to the document "Activities Monitoring Process Guidelines" attached to this call.

3.12 Mandatory deliverables and milestones

The minimum core deliverables expected from an activity are shown below in the table. This provides the minimum requirements on compliance. Additional deliverables may be needed, depending on product/service/training programme solution and applicants can add them to the deliverables list at proposal submission stage. All mandatory deliverables have to be reported by the due time for the proper monitoring of the activity.

Deliverable name	Delivery date (in months)
Plan for dissemination and exploitation including communication activities	Within the first 6 months of the activity
Commercialization and Scalability Plan	Within the first 9 months of the activity
Business Agreement	Month 10

Deliverable name	Delivery date (in months)
Gender equality plan	Within the first 6 months of the activity. Only public or private research organizations or higher education establishment.
Learning Programme Curriculum	Month 9
Publishable summary of achievements to be used as dissemination material by EIT Manufacturing	By the end of the activity

Additionally, activities must comply with the following milestones:

Milestone	Due date (in months)
Programme outline and learning outcomes of the learning paths and/or modules defined	Month 4
First two nuggets ready for preliminary review	Beginning of month 5
Peer reviewed finalized	End of month 8
Content published	End of month 11
Delivery of the training	By the end of the activity

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 mobility community. The overview is provided in the table below.

Event type	Date
Infoday & MatchMaking 1:1 – Online Event	19th – 20th September 2023
Q&A Session	October 2023

Call Contact points

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.

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 them build up proposal consortia.

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 Proposal submission process

All Activity Leaders must submit the proposals via the Plaza submission tool.

If partner is not yet registered in the submission tool, please note that new registration will be accepted at the latest 3 days before the closing of the Call for Proposals:

- New Organization? Register here
- New person?[12] Register here
- Log in to the submission tool.

The deadline for the submission of the proposals is*: 20ᵗʰ November 2023 23:59 CET.*

4.3 Proposal submission mandatory documentation

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

- Online application form
- Business Owner deck
- Instructional Designer deck
- GANTT

NB: Any documentation missing or considered incomplete, may be a reason for application rejection.

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[12] *It applies to new persons of registered organizations*

5. Proposal evaluation and selection process

5.1 Eligibility and admissibility check

In order to be considered admissible, applications must be:

- Submitted before the **call deadline** (see Call Summary).
- Submitted in **English**.
- Submitted electronically **through the EIT Manufacturing submission tool.**
- 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.

A proposal will be eligible if it shows:

Consortia composition	The consortium shall be composed by at least 3 legal entities independent from each other and each established in a different country as follows:
	- at least 1 independent legal entity established in a Member State; and - at least 2 other independent legal entities, each established in different Member States or Associated Countries.

	Additional call specific conditions apply according to paragraph 3.4 of this document. Accordingly:
	1. consortia must include entities geographically based in at least, two different EIT Manufacturing CLCs and
	2. the following roles shall be clearly covered within the consortium:
	    - 1 Lead Partner.
	    - 1 Manufacturing Company
	    - At least 1 Business Owner.

Co-funding rate	Proposals must have a minimum co-funding of 30%. **Applicable only for proposals under Engage society and pupils segment.** Co-funding is positively evaluated in Skills Driven-Learning and Education for Transforming Organizations segments.

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 (see paragraph 5.6 and the document Appeal procedure linked to the call).

5.2   Evaluation of proposals

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	*Extremely poor or None*	The information provided is considered irrelevant or inadequate compared to the specific call provisions
2	*Bad*	The information provided lacks relevant quality and contains significant weaknesses, compared to the specific call provisions
3	*Average*	The overall information provided is adequate, however, some aspects are unclearly or insufficiently detailed, compared to the specific call provisions
4	*Good*	The information provided is adequate with sufficiently outlined details, compared to the specific call provisions
5	*Excellent*	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 averaged 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 is 25. The default threshold for individual criteria is 3 and the default overall threshold is 15.

A weighting is then applied to the score per criteria to determine the final overall score for the ranking.

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

Excellence	Max. scoring: 5 Threshold: 3/5
Coherence	
The proposal has overall measurable and achievable objective and the resulting learning programme(s) is (are) clearly explained and pertinent with the topic.	1-5
The proposal identifies and properly describes the overarching learning outcomes of the training/education activity. The proposal foresees a final assessment of the achievement of the learning outcomes and the method is accurately described	1-5
Novelty	
The proposal addresses a verified unmet skilling/upskilling/reskilling need and the value proposition addresses the specific needs and barriers of the target group.	1-5
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 will make use of innovative teaching, learning and upskilling methodologies and approaches	1-5
Inclusiveness	

The proposal takes into consideration gender balance, demographic diversity (age, language) and inclusivity in the development of the learning programme.	1-5

Impact: social, economic, financial, and sustainability	Max. scoring: 5 Threshold: 3/5
Project pathway towards impact	
The proposal convincedly describes how the learning programme(s) contribute towards impact (including estimation of scale and significance) and the direct and indirect social and environmental impact addressed by the proposal are measurable and significant.	1-5
The proposal addresses specific target group/s and/or market sector/s and including a gender perspective and the proposal demonstrates a competitive advantage over existing offers in the market, further strengthened by the demonstrated by the willingness of users/customers to benefit from the proposed solution.	1-5
The proposal defines measures to ensure the durability and transferability of outcomes and it has the potential to be repeated (doing the same activity again) and scaled up (repeated without a significant additional development budget)	1-5
Effectiveness of the proposed measures to exploit the learning programme(s) and project outcomes and to maximise impact	
The proposal identifies the Business Owner and demonstrates its track record on the commercialization of learning programmes aligned with the results of the activity. The identified Business Owner is able to ensure the scalability and exploitation of the learning programme(s) after the completion of the activity and its funding.	1-5
The proposal describes a clear, feasible and convincing commercialisation and/or exploitation strategy of the learning programme(s) and a convincing IPR (Intellectual Property Rights) strategy among the partners is in place.	1-5

The proposal presents a structured dissemination and communication plan which guarantees the communication of the activity activities to different target audiences	1-5

Implementation and sound financial management	Max. scoring: 5 Threshold: 3/5
Workplan, including allocation of budget, tasks, and resources	
The workplan and related GANNT, deliverables, outputs and milestones are aligned to the call guidelines requirements, the proposal overall objectives, expected learning programme(s) and KPIs.	1-5
The proposal budget is clearly outlined, justified, and reflects value for money.	1-5
Management structures and procedures, including quality management and risk management	
The proposal identifies clear responsibilities to guarantee an effective management of the proposed activity, including the management of the relevant risks identified.	1-5
Consortium fit for purpose	
The applicants represent the right competencies, skills and expertise in accordance with the proposal scope (including a business owner, an instructional designer, and when applicable, at least 1 manufacturing company). The tasks and roles are clearly specified in the proposal and workplan.	1-5

Strategic fit evaluation criteria	Max. scoring: 5 Threshold: 3/5
The proposal contribution to achieve the mandatory EIT Core KPIs and EITM Strategic Objectives is credible and shows potential to	1-5

exceed minimum KPI targets to reach significant shares of the target groups	
The proposal integrates EITM requirements in line with the EIT Manufacturing upskilling and reskilling Quality System and Competency Model including the integration on a innovation and business perspective (Knowledge Triangle Integration)	1-5
The proposal clearly describes how it contributes to bring value to EIT M assets and programmes (Skills.move digital learning Platform, Teaching & Learning Factories, EIT Labelled Master and PhD) and details how it plans to exploit them.	1-5
The proposal provides a credible strategy and a reasonable revenue share (%) for contributing to the EIT M financial sustainability and commit to the Financial Sustainability mechanisms and agreements indicated in the guidelines	1-5

European Dimension evaluation criteria	Max. scoring: 5 Threshold: 3/5
The consortium demonstrates pan-European outreach, including RIS countries, and the proposal considers relevant synergies with other EU instruments and programmes.	1-5

The total scoring of 25 points is distributed as follows:

Excellence	Max score *5* Threshold: 3/5 *Weighting: 25%*
Impact	Max score 5 Threshold: 3/5 Weighting: 30%
Implementation	Max score 5 Threshold: 3/5 Weighting: 20%

Strategic Fit	Max score 5 Threshold: 3/5 Weighting: 20%
EU dimension	Max score 5 Threshold: 3/5 Weighting: 5%
Total	*25 points*

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).

5.3 EIT Manufacturing Management Team Evaluation Committee

The EIT Manufacturing Management Team Evaluation Committee will carry out to a strategic evaluation of the proposals.

The EIT Manufacturing Management Team Evaluation Committee is composed of the Thematic Pillar Director and the 6 CLC Directors.

Only proposals assessed from the independent evaluators (results of consensus meetings) as eligible for funding (above the threshold in all the 5 criteria and overall) will be passed to the EIT Manufacturing Management Team Evaluation Committee.

Within the EIT Manufacturing Management Team Evaluation Committee, a maximum of 5 additional points (top-up) will be assigned by assessing the following 2 high level criteria with the same weight.

Criteria	Scoring methodology
Portfolio fit	1 Extremely poor or None 2 Bad 3 Average 4 Good 5 Excellent

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

The scores will be given at criterion level and are then averaged together to come with a final EIT Manufacturing Management Team Evaluation Committee top-up.

The final overall score assigned to an activity proposal will be calculated as follows:

Final Overall Score = Consensus meeting final score + EIT Manufacturing Management Team Evaluation Committee top-up

The final overall score cannot be lower than the consensus meeting final score and it can reach a maximum of 30 points.

The Thematic Pillar Director in charge proposes the commented new ranking, which will be discussed with the Management Team members, where an agreement will be reached. After the agreement, proposals will be selected based on ranking and available budget. High-quality proposals not selected will be put on the reserve list.

5.4   Communication of results and negotiation period

EIT Manufacturing will inform by email all proposals leaders once the evaluation is completed.

The applicants might receive 4 types of evaluation feedback:

1. The proposal is accepted for funding. The proposal has got a high evaluation score and is selected for funding based on available budget assumptions.
2. 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.
    a. If the Activity 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.
3. 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.

4. 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, e.g., in case a proposal accepted with conditions is not funded. The duration of the reserve list is up to end of August 2024[13].

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:

- Declaration of honour signed for every organization participating in an activity
- Legal and financial documents (depending on the legal form of the participant and if requested by EIT Manufacturing)

5.5 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 the Evaluation (see document Appeal procedure)

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[13] The validity of reserve lists may be prolonged according to the needs of EIT Manufacturing. Being on a reserve list, however, does not guarantee access to funding. A decision on the extension of the validity of a reserve list will usually be taken a few weeks before the list expires and will be communicated via email. If no such decision is taken, the list expires as foreseen.

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[14]. Applicants 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 relevant recent documentation substantiating the Declaration of Honour at the latest before signing the agreements mentioned under point 5.4. Failure to provide adequate documentation will 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., CLCs) 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 from EIT Manufacturing, to support@eitmanufacturing.eu in vector format or in image format with at least 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

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[14] https://eur-lex.europa.eu/legal-content/EN/TXT/HTML/?uri=CELEX:32018R1046&from=EN

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.

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. CLCs) 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[15].

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

In case of content creation on Skills.move platform, participating entities will respect the Intellectual Property Rights described in the Digital Content Agreement.

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[15] https://ec.europa.eu/info/funding-tenders/opportunities/docs/2021-2027/common/agr-contr/general-mga_horizon-euratom_en.pdf

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.

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 . 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/or 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 law of France. The applicants agree to observe the obligations set forth in the (Model) Grant Agreement[16] 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 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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[16] https://ec.europa.eu/info/funding-tenders/opportunities/docs/2021-2027/common/agr-contr/general-mga_horizon-euratom_en.pdf