

Call Guidelines

Business Plan 2023 – 2025

Call for proposals for Regional
Innovation Scheme (RIS) Activities to
be executed in 2024-2025

Version history

Date	Comments
18 September 2023	Paragraph 3.7. Payment conditions, Point 2 (Equity Shares) modified.
21 September 2023	Modified the Call Summary: Changed “The total budget allocated to this call” to the “Total funding allocated to this call” for better clarity.
22 September 2023	Budget increased for Topic 1.

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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.
Services Agreement	Previously “Financial Sustainability ¹ Agreement”. The Agreement which is signed with the aim of contributing to the Financial Sustainability of the KIC EIT Manufacturing and its community.
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

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

	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.
Key Marketable Innovation	Key Marketable Innovation (KMI) is an innovative concept, product, or solution that has been identified and prioritized due to its high potential to be commercialized and generate revenue in the marketplace. KMIs typically offer unique features or benefits that differentiate them from existing solutions and address unmet needs or opportunities in the market. KMIs are innovations that have a high potential for commercialization, as they offer a valuable solution or improvement to a market need, and can generate significant economic value for the organization that develops and markets them.
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

Disclaimer: this document provides the applicants with detailed information on the EIT Manufacturing RIS Call 2024 for proposals for the EIT Manufacturing Business Plan 2023-2025. The information given is subject to revision, according to new potential rules or requirements provided by EIT and/or by the EC.

Call for Proposals - Main Features	
Dates	<p><i>Call publication:</i> 11th September 2023</p> <p><i>Call opening:</i> 19th September 2023 at 10:00 CEST</p> <p><i>Call closing:</i> 20th November 2023 at 23:59 CEST</p> <p><i>Eligibility and admissibility check:</i> by 24th November 2023</p> <p><i>Evaluation of proposals:</i> Mid-December 2023 – Mid-January 2024</p> <p><i>Communication of results:</i> End of February 2024</p> <p><i>Selected activity proposals start date:</i> June 2024</p>
Introduction	Call for proposals for Regional Innovation Scheme (RIS) Activities to be executed in 2024 with the aim of enhancing the innovation capacity of EIT RIS countries and regions.
Total funding allocated to this call	1 Million EUR
Duration	Up to 18 months
Link to the submission portal	<p>New Organization? Register here</p> <p>New person? Register here</p> <p>Log in to the submission tool</p>
List of documents to be submitted	<ul style="list-style-type: none"> • Application form to be completed on the submission tool. • Business Owner deck • GANTT chart

<p>List of documents to take into consideration</p>	<ul style="list-style-type: none"> • Horizon Europe Model Grant Agreement • EIT Manufacturing Strategic Agenda • Appeal and redress procedure • List of KPIs • Eligibility of expenditures • Financial Support Agreement • Activities Monitoring Process Guidelines • Declaration on honour on eligibility, exclusion, and selection
<p>Evaluation criteria</p>	<p><i>Evaluation criteria assessed by the independent experts:</i></p> <ul style="list-style-type: none"> • Excellence, novelty, and innovation. • Impact. • Implementation. • 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.

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

Strategic objectives

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

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

2.2 Knowledge triangle integration

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

2.3 Eligible entities

Entities eligible to participate²

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 Regulation³ 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:

- 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 countries⁴;

Consortium composition

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

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)

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

- 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:

- consortia must include entities geographically based in at least, two different EIT Manufacturing CLCs⁵.
- **partnership eligibility in RIS CFP vary between the Topics (see section 3.1).**
- for applicants based in the United Kingdom their participation follows the conditions of the UKRI Guarantee funding described here₂
- for applicants established in Switzerland their participation is not currently covered by an EU agreement and, as a matter of consequence, 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.

Additional call specific conditions apply and are explained in section 3.

2.4 EIT Manufacturing membership

EIT Manufacturing is a KIC⁶ of European Institute of Innovation & Technology (EIT). All entities of selected proposals need to be part of the KIC EIT Manufacturing community and will have to choose one of the following partnership models (and related annual fee) before signing the relevant agreements (See section 5.4) and initiating their projects:

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

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

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

- | | |
|---|----------|
| ▪ Large enterprises, research institutes and universities | 35,000 € |
|---|----------|

⁵ <https://www.eitmanufacturing.eu/in-your-country/>

⁶ Regulation (EU) 2021/819 of the European Parliament and of the Council of 20 May 2021 on the European Institute of Innovation and Technology (recast), Article 2 Definitions p. 2: A large-scale Institutionalised European Partnership, as referred to in Regulation (EU) 2021/695, of higher education institutions, research organisations, companies and other stakeholders in the innovation process in the form of a strategic network, regardless of its legal form, based on joint mid- to long-term innovation planning to meet the EIT challenges and contribute to attaining the objectives established under Regulation (EU) 2021/695

- Mid-sized companies (< 2,000 FTE) 20,000 €
- SME (< 250 FTE, turnover < 50M€ or balance sheet < 43M€) 10,000 €

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

More information on the partnership models is available on the website⁷.

Under Horizon Europe, **Linked Third Parties/affiliated entities**⁸ 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 (considering all Call for Proposals launched by EIT Manufacturing for that year):

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

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

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

⁷ <https://www.eitmanufacturing.eu/partners/partnership-models/>

⁸ 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.

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 submission tool⁹. If you have already participated in projects funded by the EU before and have your PIC number validated, you can proceed with the registration of your organisation on the submission tool.

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 project 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.

The submission of expression of interests will be open until 15th November 23:59 CEST.

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.

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.

⁹ Links to the submission tool are provided on Section 1.

- 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 Regulation¹⁰). 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;

¹⁰ <https://eur-lex.europa.eu/legal-content/EN/TXT/?uri=celex:32020R0852>

- 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.

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

3.1 Call thematic and expected results

Purpose

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

Therefore, EIT Manufacturing RIS aims towards engaging local stakeholders —individuals (notably students, researchers, entrepreneurs) and entities (e.g. start-ups, scale-ups, universities, research labs, NGOs, regions and cities)—in EIT Manufacturing activities. The call for 2023 includes business creation and innovation RIS activities.

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

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

- I. Having enhanced participation of organisations from EIT RIS countries;
- II. Involving relevant stakeholders from EIT RIS countries in EIT Manufacturing activities;
- III. Executing pilot implementations and demonstrators in EIT RIS countries;
- IV. Having enhanced, specific impact to EIT RIS countries;
- V. Deploying activities in EIT RIS countries and regions where EIT Manufacturing has limited or no presence yet.

[Topic 1: Fair, Green and digital 'twin' transition for SMEs at EIT RIS countries \(RIS Business Creation\)](#)

Purpose: This call is for projects aiming to support innovative solutions with special focus – although not restricted – on fair green and digital solutions for SMEs, through organizing piloting activities for applying innovation towards:

- i. creating clear environmental benefits (e.g. reduction of CO2 emissions, adapting green solutions, etc.);
- ii. increasing productivity, innovation capacity, resilience and sustainability;
- iii. making the jobs of the humans working in the manufacturing and construction sectors more attractive and safe by introducing effective human-machine interaction and collaboration where appropriate, and point the way to opportunities for upskilling and fair working conditions;
- iv. creating new business models, sustainable-by-design advanced materials and technologies enabling the switch to decarbonisation in all major emitting industrial sectors, including green digital technologies;
- v. applying enhanced data collection, encouraging digital culture and improved collaboration between the stakeholders;
- vi. ensuring the digital transformation of businesses and the creation of digital skills and infrastructure, being aligned with the EU Cohesion Policy.

Topic Description: The activity should demonstrate how EIT Manufacturing can, in practice, help local players from RIS eligible countries to cover needs such as green and digital transformation for “**small legal entities**” and **individuals**:

- “**Small legal entities**” includes startups, scaleups, SMEs and similar.
- **Individuals** include entrepreneurs, early-stage innovators and similar with the intention to register a company within the duration of the activity (contributing to KPI EITHE4.4).

The support to the “small legal entities” and individuals may include education and training, innovation and business creation aspects helping the selected applicants to address their relevant needs and business priorities towards a fair, green and digital twin transition activity (e.g.: coaching, financial support, mentoring, training,...). However, their activity and support provided is expected to have the stronger focus on addressing business creation aspects though business transformation (twin transition).

The supported “small legal entities” and individuals must be selected through an open call that the consortium will manage during the activity implementation. Please be reminded that the open call should be aligned the GA document and the rules of EIT Manufacturing:

- Call should be open at least 2 months.
- The guidelines should be sent to RIS team to check before publishing.
- Evaluation of the applications should be done by 3 external independent experts (to the activity partners and to EIT Manufacturing partnership).
- The call should be open only for RIS eligible companies or individuals with RIS citizenship.

The number of “small legal entities”/individuals supported is at least 15 per activity from at least 6 different RIS eligible countries. The selected applicants will be supported by the consortium in

their green and digital twin transition with relevant services, as well as relevant funding. The number of “small legal entities”/individuals supported is expected to be included also in the relevant KPIs.

Duration: maximum project duration 18 months.

Partnership. The partners are expected to be from business (e.g. corporates, service/technology providers, SMEs and end users) and research (Universities and RTOs). Recommended number of partners: 3-4, of which at least 3 should be from different RIS eligible countries. The consortium should include:

- At least 1 business partner.
- At least 1 partner that will have the role of **business owner** as defined in Section 3.3 from a RIS eligible country.

Expected funding per activity: 400k€. Any co-funding rate for this segment is not required. However, co-funding will be positively evaluated.

Mandatory KPIs:

KPI code	Short Description	Minimum Target
EITHE04.4 Number of start-ups established	Number of start-ups established in year N as a result / based on the output(s) of KAVA(s), or start-ups created for the purpose of an innovation project to organise and support the development of an asset (but not later than six months after the completion of KAVA) having financial transactions of at least 10 000 EUR for services/products (result of the KIC KAVA) sold to customers.	2
EITHE03.1 Supported Startups/Scale-ups	Number of start-ups and scale-ups supported by KICs for at least 2 months in year N, provided the KIC’s services contribute to the company’s growth (including potential growth). KIC should justify that the provided services contribute to the company’s growth (including potential growth). Examples of such services are mentoring, consultancy on access to finance and markets, product / service marketing, legal advice, internationalization, match-making, etc. The services should be provided for a total period of at least two months. Start-ups and scale-ups will be reported by country of registration of the venture.	15

EITHE03.2 RIS Supported Startups/Scale-ups	Number of start-ups and scale-ups registered in EIT RIS country supported by KICs for at least 2 months in year N.	15
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Recommended KPIs*:

KPI code	Short Description
EITHE02.1 Innovations launched on the market	Number of all innovations introduced on the market during the KAVA duration or within 6 months after completion. Innovations include new or significantly improved products (goods or services) sold.
EITHE02.2-EITRIS Innovations launched on the market	# products or processes (as per EITHE02.1 definition) launched on the market by organisations from the EIT RIS countries
EITHE02.3-EITRIS Innovations launched on the market	Number of EIT RIS countries related to the products introduced on the market (as per EITHE02.1 definition).
EITHE02.4 Innovations launched on the market	Number of innovations introduced on the market during the KAVA duration or within 6 months after completion with a sales revenue of at least 10 000 EUR documented. Innovations introduced on the market must be directly linked with the KAVA and reported in the year when they reached the first revenue (but not later than three years after completion of the KAVA).
EITHE04.1 Start-ups created	Number of start-ups established in year N as a result / based on the output(s) of KAVA(s), or start-ups created for the purpose of an innovation project to organise and support the development of an asset (but not later than six months after the completion of KAVA).
EITHE04.2-EITRIS Start-ups created	EIT RIS Start-ups created of/for innovation: Number of start-ups registered in EIT RIS country in year N and established as a result/ based on the output(s) of Innovation/ Research related KAVA(s), or created for the purpose of an innovation project to organise and support the development of an asset
EITHE08.1 Participants in nonlabelled education and training	Number of successful participants in EIT professional development courses, online training courses and other education/training activities delivered or in a process of delivery (by country and type of programme), including data on country of citizenship and gender. Only participants, who successfully finished the programme, will be counted. For this KPI, only those education and training activities which have clearly defined learning outcomes, and which carries out competency assessment method are applicable

EITHE08.2-EITRIS Participants in nonlabelled education and training	EIT RIS Participants in (non degree) education and training: Number of successful participants in EIT professional development courses, online training courses and other education/training activity delivered or in a process of delivery with citizenship in EIT RIS countries
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*The list of KPIs is recommended but the proposers are free to select the most appropriate KPIs for their proposal. The above KPIs are based on the guidelines received from EIT and might be amended when the updated guidelines for KPIs will be available. The full description of the KPIs is presented in the annex.

[Topic 2: Adopting Deep Tech innovation in RIS countries \(RIS INNOVATION – AI & Deep Tech\)](#)

Purpose: This call is for projects aiming to support innovative solutions with special focus – although not restricted – on applying Deep tech innovation in manufacturing in RIS countries.

Topic Description: Deep tech fields like AI, advanced materials, blockchain, biotechnology, robotics, drones, photonics and quantum computing are emerging and support in the development of these strategic technologies is needed, as highlighted in the STEP proposal of the European Commission. The activities under this topic aim to support stakeholders in EIT RIS countries to enhance their innovation capacity. Some technical challenges and topics to be considered for projects under this segment are including among others Internet Of Things, Data Science and Big Data, Cybersecurity, Blockchain Technology, Robotic Process Automation, Cloud Technology, AI applications such as digital twins for virtual commissioning, AI for predictive maintenance and production optimization, forecast the demand for products and pricing, machine learning & machine vision, data security and analytics, focusing on applications such as quality control, management, monitoring, customer care, personalization and maintenance. Proposals should identify who will be the potential customers. Applicants should identify which local/regional parameters expect to address with their innovative solutions, as well as the industrial sectors that will be addressed. The economic, environmental and societal impact of the relevant activities in EIT RIS area should be clearly identified.

The consortium must propose an innovation with a TRL¹¹ of at least 7 at the start of the project. Solutions are expected to achieve TRL 8 or higher by the end of the activity. The business owner's involvement and effort in the definition and execution of the commercialisation plan, which is expected to start from activity kick-off, should be described in the workplan.

Duration: maximum project duration 18 months.

¹¹ https://ec.europa.eu/research/participants/data/ref/h2020/wp/2014_2015/annexes/h2020-wp1415-annex-g-trl_en.pdf

Partnership. The partners are expected to be from business (e.g. corporates, service/technology providers, SMEs and end users) and research (Universities and RTOs), contributing on sharing the good practice related to Knowledge Triangle Integration and increasing the relevant activities in EIT RIS eligible countries. Recommended number of partners: 3-6, of which at least 3 should be from different RIS eligible countries. The consortium should include:

- At least 1 manufacturing industrial partner.
- At least 1 partner that will have the role of **business owner** as defined in Section 3.3 from RIS country.
- At least 1 partner that will have the role of **end user** as defined in Section 3.3 from RIS country.

Expected funding per activity: 450k€. Co-funding rate for this segment is 30%.

Mandatory KPIs:

KPI code	Short Description	Minimum Target
EITHE02.4 Innovations launched on the market	Number of innovations introduced on the market during the KAVA duration or within 6 months after completion with a sales revenue of at least 10 000 EUR documented. Innovations introduced on the market must be directly linked with the KAVA and reported in the year when they reached the first revenue (but not later than three years after completion of the KAVA).	2

Recommended KPIs*:

KPI code	Short Description
EITHE2.1 Innovations launched on the market	Number of all innovations introduced on the market during the KAVA duration or within 6 months after completion. Innovations include new or significantly improved products (goods or services) sold.
EITHE02.2-EITRIS Innovations launched on the market	# products or processes (as per EITHE02.1 definition) launched on the market by organisations from the EIT RIS countries
EITHE2.3-EITRIS Innovations launched on the market	Number of EIT RIS countries related to the products introduced on the market (as per EITHE02.1 definition).

EITHE04.1 Start-ups created	Number of start-ups established in year N as a result / based on the output(s) of KAVA(s), or start-ups created for the purpose of an innovation project to organise and support the development of an asset (but not later than six months after the completion of KAVA).
EITHE04.2-EITRIS Start-ups created	EIT RIS Start-ups created of/for innovation: Number of start-ups registered in EIT RIS country in year N and established as a result/ based on the output(s) of Innovation/ Research related KAVA(s), or created for the purpose of an innovation project to organise and support the development of an asset
EITHE04.4 Number of start-ups established	Number of start-ups established in year N as a result / based on the output(s) of KAVA(s), or start-ups created for the purpose of an innovation project to organise and support the development of an asset (but not later than six months after the completion of KAVA) having financial transactions of at least 10 000 EUR for services/products (result of the KIC KAVA) sold to customers.
EITHE08.1 Participants in nonlabelled education and training	Number of successful participants in EIT professional development courses, online training courses and other education/training activities delivered or in a process of delivery (by country and type of programme), including data on country of citizenship and gender. Only participants, who successfully finished the programme, will be counted. For this KPI, only those education and training activities which have clearly defined learning outcomes, and which carries out competency assessment method are applicable
EITHE08.2-EITRIS Participants in nonlabelled education and training	EIT RIS Participants in (non degree) education and training: Number of successful participants in EIT professional development courses, online training courses and other education/training activity delivered or in a process of delivery with citizenship in EIT RIS countries

* The list of KPIs is recommended but the proposers are free to select the most appropriate KPIs for their proposal. The above KPIs are based on the guidelines received from EIT and might be amended when the updated guidelines for KPIs will be available. The full description of the KPIs is presented in the annex.

Expected outcomes & impact

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

- The proposed activity is going to engage in its activities a significant number of partners and/or activity partners from RIS countries.
- The proposed activity is going to address a good number of RIS countries.

- There is a clearly benefit for stakeholders in RIS countries and/or regions.
- The activity will strongly contribute to the advancement of the innovation performance of RIS countries.
- The activity includes appropriate communication measures to increase the impact of the activity and brand recognition of EIT, EIT RIS and EIT Manufacturing.

Examples

Some examples of different types of RIS activities can be found [here](#).

3.3 Applicants profile

Additionally, to the minimum conditions for consortium composition laid down in section 2.3, consortia must include entities geographically based in at least, two different EIT Manufacturing CLCs¹². The consortium roles include (see for each topic in Section 3.1):

- **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.
- **End-Users.** At least 1 different RIS organisation that use the key marketable innovation(s) to fulfil a specific need or achieve a business objective in a real-world industrial environment. The end-users must be consumers of the key marketable innovation(s) and each of them must provide at least 1 use case, testing and implementing the innovation(s) in their real industrial environment. **The end user should come from a RIS eligible country for the RIS Call for Proposals.**
- **Business Owner.** The organisation in charge of the commercialisation of the key marketable innovation(s) with a legal entity established in a Member State or Horizon Europe Associated Country. The Business Owner will be the direct contact for EIT Manufacturing and the consortium for the Services Agreement and responsible for the commercialisation plan and its execution. A suitable Business Owner is a for-profit organisation, with a track record in creating new businesses, and in building marketing and commercialisation strategies. The organisation has a deep understanding of the identified market, its competitors, and barriers to entry, and most importantly a proven track record of sales and customers in the target group sector identified by the consortium. All these elements should be clearly described in the proposal (see “Business

¹² <https://www.eitmanufacturing.eu/in-your-country/>

Owner deck” template). **The business owner should come from a RIS eligible country for the RIS Call for Proposals.**

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

It is also noted that, as shown in the above link, Italy and Spain are EIT RIS eligible countries. Therefore, organisations from and proposals focused on RIS-related aspects in Italy and Spain are welcome to apply for EIT RIS activities. However, since EIT Manufacturing has CLCs in Italy and Spain, indicating possible good presence, it is strongly recommended in this case to have a strong participation and/or focus on a good number of other EIT RIS eligible countries and avoid having activities dedicated solely on Italy and Spain.

3.4 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 Agreement¹³.

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

¹³ https://ec.europa.eu/info/funding-tenders/opportunities/docs/2021-2027/common/agr-contr/general-mga_horizon-euratom_en.pdf

COMMUNICATION, DISSEMINATION AND EXPLOITATION WHY THEY ALL MATTER AND WHAT IS THE DIFFERENCE?

Communication:
Promote your action and results

Inform, promote and communicate your activities and results

Reaching multiple audiences
Citizens, the media, stakeholders

How?

- Having a well-designed strategy
- Conveying clear messages
- Using the right media channels

When?
From the start of the action until the end

Why?

- Engage with stakeholders
- Attract the best experts to your team
- Generate market demand
- Raise awareness of how public money is spent
- Show the success of European collaboration

Legal obligation of your Grant Agreement

Dissemination:
Make your results public

Open Science: knowledge and results (free of charge) for others to use

Only to scientists?
Not only but also to others that can learn from the results: authorities, industry, policymakers, sectors of interest, civil society

How?
Publishing your results on:

- Scientific magazines
- Scientific and/or targeted conferences
- Databases

When?
At any time, and as soon as the action has results

Why?

- Maximise results' impact
- Allow other researchers to go a step forward
- Contribute to the advancement of the state of the art
- Make scientific results a common good

Legal obligation of your Grant Agreement

Exploitation:
Make concrete use of results

Commercial, Societal, Political Purposes

Only by researchers?
Not only, but also:

- Industry including SMEs
- Those that can make good use of them: authorities, industrial authorities, policymakers, sectors of interest, civil society

How?

- Creating roadmaps, prototypes, softwares
- Sharing knowledge, skills, data

When?
Towards the end and beyond, as soon as the action has exploitable results

Why?

- Lead to new legislation or recommendations
- For the benefit of innovation, the economy and the society
- Help to tackle a problem and respond to an existing demand

Legal obligation of your Grant Agreement

What else? Acknowledge the EU funding!

3.5 Budget and funding

The total maximum EIT funding allocated to this call around 1 Million EUR (TBC). The amounts will be allocated according to the below estimation.

Call Thematic	Indicative Budget	Maximum EIT funding rate (%)
Topic 1	400k€	100%
Topic 2	450k€	70%

EIT Manufacturing will tentatively fund one activity for Topic 1 and two activities for Topic 2.

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.

Activity proposals submitted to this call are expected to have co-funding rate.¹⁴

Topic	Project Duration	Minimum co-funding rate
Topic 1	18 months	0%
Topic 2	18 months	30%

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

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 3.8. The last instalment will be transferred at the end of the activity, once eligible costs have been determined and following the completion of final activity monitoring assessment and the fulfilment of all obligations specified in the Financial Support Agreement:

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

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

Prior to the payment, the cumulative funding received by an individual entity in the Business Plan 2023- 2025 for all the EIT Manufacturing projects they participate in will be checked. Whenever an entity reaches a cumulative EIT funding of 430,000€, a Certified Financial Statement (CFS) audit will be requested prior to the payment¹⁵. 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 3.8.

The scope of the CFS audit is to check the eligibility of the costs reported so far by a specific entity for all projects where they participate, altogether. The first CFS audit will check costs reported up to a specific date “D”. A second CFS audit (meaning an entity reaches again a cumulative EIT funding of 430,000€) 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.

¹⁴ By co-funding we mean financial contribution other than EIT Manufacturing funding allocation.

¹⁵ According to Art 24.2 of the Horizon Europe MGA

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.

3.6 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.

3.7 Financial sustainability

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

Description of services

All selected activities should choose one of the payment schemes (described in the next section) and sign a Services Agreement before their start. The Services Agreement will run throughout the duration of the activity, and, in case of an initial commercialisation of the solution, for a minimum of 2 additional years. It will give access to the following services:

- **To the consortium**, during the implementation of the activity:
 - Dedicated support from an EIT Manufacturing Manager;
 - Matchmaking with any stakeholders that may be interested in the activity (Businesses, Research Centers etc);
 - Participation to dissemination or business events;
 - Support to drive the innovation to success and grow the business;
- **To the business owner**, after the end of the activity:
 - Further matchmaking with any stakeholders that may be interested in the activity to further expand it and fully monetize it at pan-European level
 - Training and/or coaching based on business owner’s expressed needs and EIT Manufacturing’s catalogue of training courses

- Access to insights from EIT Manufacturing and its network of experts on topics related to the activity

Payment conditions

Based on the choice made during the signing of the Services Agreement, one of the following payment schemes will entry in force:

1. A first payment of 30,000 EUR triggered at the end of the activity; followed by 2 subsequent payment of 30,000 EUR each that will occur after respectively 12 and 24 months, corresponding to the provision of services for the 12 months and the following 12 month after initial commercialisation. These amounts, in particular the first payment, can be shared among consortium members.
2. A conversion of 90,000 EUR in equity shares from the business owner, to be distributed during the next fundraising. This model is preferred in the case of young companies.
3. In the case of a startup being created during the activity to take the role of the business owner, an allocation to EIT Manufacturing of 15% of the equity of the newly created entity. This model is preferred in the case of newly created entities from academic or industrial partners.

3.8 Activity monitoring

All activities selected for funding undergo continuous monitoring by EIT Manufacturing to ensure effective progress and implementation and to trigger payments (the latter only at interim and final stage) 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 Financial Sustainability Agreement (please refer to Section 3.7) and the KPIs targets (please refer to Section 3.1) cannot be renegotiated/reduced after the start of the activity.

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

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

Type of underperformance	Funding reduction ¹⁶
Missing Core EIT KPI	20%
Missing DEL	10%
Missing EITM KIC KPI	5%

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

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

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

3.9 Mandatory deliverables

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 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 Plan	Within the first 6 months of the activity

¹⁶ % of funding reduction is calculated on the granted amount and it can be cumulative

Gender equality plan	Within the first 6 months of the activity. Only public or private research organizations or higher education establishment.
Results report	By the end of the activity
Publishable summary of achievements to be used as dissemination material by EIT Manufacturing	By the end of the activity

A maximum of 4 additional added-value deliverables can be added to the proposal. All mandatory deliverables have to be reported by the due time for the proper monitoring of the activity.

Additionally, internal documentation and technical reports could be produced by the consortium for project use. However, these documents should not be listed in the proposal. In case of a failure to deliver on project outcomes or delays, these project internal documents may be provided as supporting or mitigating evidence to EIT Manufacturing.

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	19 th - 20 th September 2023
Local MatchMaking during EIT Manufacturing RIS Hubs Conference	29 th September 2023
Q&A Session	19 th 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 and ris@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 submission tool.

If you are not yet registered, 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?¹⁷ Register [here](#).
- Log in to the submission [tool](#).

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

4.3 Proposal submission mandatory documentation

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

- Application form
- Business Owner deck
- GANTT chart

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

¹⁷ It applies to new persons of registered organizations

5. Proposal evaluation and selection process

5.1 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**; and
- Complete and must contain all the mandatory information in the online application form and all mandatory documentation.

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

5.2 Eligibility check

A proposal will be eligible if it shows:

Consortia composition	<p>The consortium shall be composed by at least 3 legal entities independent from each other and each established in a different country as follows:</p> <ul style="list-style-type: none">• 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. <p>Additional call specific conditions apply according to section 3.3 of this document.</p>
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Proposals containing one or more ineligible elements will receive an official communication from EIT Manufacturing setting out the outcome of the eligibility check and explaining why the proposal failed to meet the criteria.

The Activity leader of any proposal deemed ineligible who disputes the ineligibility decision, may appeal. This appeal must be made within 5 working days from the official EIT Manufacturing notification of ineligibility by sending an email according to support@eitmanufacturing.eu according to the Appeal document linked to the Call (see paragraph 5.6).

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

The scores shall be given at criterion/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 Weighting: 20%
Coherence	
The proposal has overall measurable and achievable objective and the innovative solutions are clearly explained and pertinent with the topic.	
Novelty	
The result of the activity represents a step forward compared to the current state-of-the-art innovation, in terms of technology, application or business model.	
The proposal demonstrates its need and relevance for society, target group or market and address clearly which is the benefit for stakeholders in RIS countries and/or regions.	
Inclusiveness	
The proposal is taking into consideration gender balance, demographic diversity (age, language) and inclusivity in the proposal innovation content.	
Impact	Max. scoring: 5 Threshold: 3/5 Weighting: 35%
Project pathways towards impact	
The proposal's expected impacts are measurable at a quantitative and a qualitative level and are aligned with the relevant topic.	

The proposal convincingly describes how the innovative solutions contribute towards impact (including estimation of scale and significance) and the direct and indirect social and environmental impact addresses by the proposal are significant.	
The proposal provides a credible strategy for financial sustainability and the co-funding level meets the minimum expected or is higher than expected by the call.	
The activity will strongly contribute to the advancement of the innovation performance of RIS countries.	
The proposed activity is going to address a good number of RIS countries.	
Effectiveness of the proposed measures to exploit the results and to maximise impact	
The activity includes appropriate communication measures to increase the impact of the activity and brand recognition of EIT, EIT RIS and EIT Manufacturing.	
The innovation impact potential is high, with a convincing and realistic revenue projection and commercialization plan. In addition, a convincing IPR (Intellectual Property Rights) strategy among the partners is in place.	
Implementation and sound financial management	Max. scoring: 5 Threshold: 3/5 Weighting: 20%
Workplan, including allocation of budget, tasks, and resources	
The workplan and related GANTT chart and deliverables are aligned with proposal overall objective, expected results and KPIs.	
The proposal budget and resources allocated are clearly outlined, justified and reflect value for money.	
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.	
Consortium fit for purpose	
The applicants represent the right competencies, skills and expertise in accordance with the proposal scope and they have differentiated, clear and specific roles (including a business owner).	
The proposed activity is going to engage in its activities a significant number of partners and/or activity partners from RIS countries.	
Strategic fit	Max. scoring: 5 Threshold: 3/5 Weighting: 20%
Contribution to EIT Manufacturing strategic objectives (EIT Manufacturing Strategic Agenda), to the EIT Core and EIT Manufacturing specific KPIs.	
The proposal addresses the concept of Knowledge Triangle Integration, integrating aspect of education, innovation and business creation.	
The proposal addresses the RIS aspects (engagement of RIS countries in the activity and impact generated in RIS countries by the result(s) exploitation).	
The proposal contributes to the long-term financial sustainability strategy of the KIC and is willing to share success.	
European Dimension	Max. scoring: 5 Threshold: 3/5 Weighting: 5%
The consortium demonstrates pan-European outreach and the proposal considers relevant synergies with other EU instruments and programs.	

The total scoring of 25 points is distributed as follows:

Excellence	Max score 5 Threshold: 3/5 Weighting: 20%
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Impact	Max score 5 Threshold: 3/5 <i>Weighting: 35%</i>
Implementation	Max score 5 Threshold: 3/5 <i>Weighting: 20%</i>
Strategic Fit	Max score 5 Threshold: 3/5 <i>Weighting: 20%</i>
EU dimension	Max score 5 <i>Threshold: 3/5</i> <i>Weighting: 5%</i>
Total	<i>25 points</i> <i>Threshold 15/25</i>

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).

5.4 Selection committee strategic evaluation

The Selection Committee of EIT Manufacturing will carry out to a strategic evaluation of the proposals.

The EIT Manufacturing Management team evaluation Committee is composed of the 3 Thematic Pillar Directors 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 are then averaged together to come with a final EIT Manufacturing Management team evaluation Committee top-up.

The final overall score assigned to a project 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.

5.5 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.

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 March 2024¹⁸.

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).

5.6 Procedure for complaints and appeal

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

¹⁸ 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.

(see document Appeal procedure)

6. Other Terms and Conditions

6.1 Exclusion Criteria

Applicants will be excluded from participating in the call if they are in any of the situations of exclusion defined in Article 136 of the EU Financial Regulation¹⁹. 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 known to the public, or that has not yet been revealed whether in tangible or intangible form, whenever and

¹⁹ <https://eur-lex.europa.eu/legal-content/EN/TXT/HTML/?uri=CELEX:32018R1046&from=EN>

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 Agreement²⁰.

Participating entities also agree to respect the EIT Manufacturing IP Policy available on this [link](#).

6.5 Disclaimers

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

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

²⁰ https://ec.europa.eu/info/funding-tenders/opportunities/docs/2021-2027/common/agr-contr/general-mga_horizon-euratom_en.pdf

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 Agreement²¹ 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.

²¹ https://ec.europa.eu/info/funding-tenders/opportunities/docs/2021-2027/common/agr-contr/general-mga_horizon-euratom_en.pdf

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.