

Call Guidelines

Business Plan 2023 – 2025

Call for proposals

Pioneering Learning Journey – Master &
Doctoral School

EIT MANUFACTURING

Updated 08/11/2023

Date	Comments
08/11/2023	EIT Manufacturing Management Team Evaluation has been excluded from this call. The Evaluation process will be done only through the independent experts' evaluation.

Index

Index.....	2
Abbreviations.....	4
Key words.....	5
1. Call summary.....	8
2. General conditions.....	10
2.1. EIT Manufacturing mission and strategic objectives.....	10
2.2. Knowledge triangle integration.....	10
2.3. Eligible entities.....	11
2.4. EIT Manufacturing membership.....	12
2.5. Applicants' registration process.....	13
2.6. Gender equality and inclusiveness.....	14
2.7. EU taxonomy for sustainable activities.....	15
2.8. Ethics.....	15
2.9. Open science and social science.....	15
3. Call specific conditions.....	17
3.1. Call thematic and expected results.....	17
3.2. Summer School for EIT Manufacturing Master School programmes.....	18
3.2.1. Duration.....	19
3.2.2. Applicants profile.....	20
3.2.3. Core KPIs.....	20
3.2.4. Specific requirements.....	21
3.3.1. Duration.....	28
3.3.2. Applicants profile.....	28
3.3.3. Core KPIs.....	29
3.3.4. Specific requirements.....	30
3.4. Dissemination, communication, and exploitation of the results of the activities.....	31
3.7. Budget and funding.....	32
3.8. Eligibility of expenditures.....	34
3.9. Financial sustainability.....	34
3.10. Activity reporting.....	34
3.11. Mandatory deliverables.....	35
4. Proposal preparation and submission.....	36

4.1	Guidance and support on proposal preparation	36
4.2	Proposal submission process	36
4.3	Proposal submission mandatory documentation	37
5.	Proposal evaluation and selection process	38
5.1	Eligibility and admissibility check	38
5.2	Evaluation of proposals	39
5.3	Communication of results and negotiation period	44
5.4	Procedure for complaints and appeal	45
6.	Other Terms and Conditions	46
6.1	Exclusion Criteria	46
6.2	Logos and Trademarks of the Applicants	46
6.3	Confidentiality	46
6.4	Intellectual Property	47
6.5	Disclaimers	47
6.6	Processing of Personal Data	48
6.7	Applicable Law	48
6.8	Rights to activate audits	49
ANNEX A	50
	Master School programmes and Overarching Learning Outcome (OLOs)	50
ANNEX B	0
	Doctoral School programmes and OLOs	0
ANNEX C	3

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
OLO	Overarching Learning Outcome
EITM	EIT Manufacturing
I&E	Innovation & Entrepreneurship

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.
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.

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.
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.

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.

1. Call summary

Disclaimer: this document provides the applicants with detailed information on the EIT Manufacturing Pioneering Learning Journey – Master & Doctoral School Call 2024 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 opening: 29th September 2023 11:00 CEST</i></p> <p><i>Call closing: 29th November 2023 23:59 CET</i></p> <p><i>Eligibility and admissibility check: 30th November 2023</i></p> <p><i>Evaluation of proposals: 11th December 2023</i></p> <p><i>Communication of results: 15th December 2023</i></p> <p><i>Revisions of successful proposals 20th December 2023</i></p> <p><i>Selected activity proposals start: 1st January 2024</i></p>
Introduction	EIT Manufacturing Master and Doctoral School are two long terms activities delivering entrepreneurship education for academic students and manufacturing professionals. The call for proposal focuses on the annual summer school for the EIT Manufacturing Master School and on the innovation aspects of the annual Innovation & Entrepreneurship (I&E) programme of the Doctoral School
Total budget allocated to this call	560 000 EUR in 2024
Duration	12 Months
Link to the submission portal	<p>New Organization? Register here</p> <p>New person?² Register here</p>

² It applies to new persons of registered organizations

	Log in to the submission tool.
List of documents to be submitted	<ul style="list-style-type: none"> • Application form available on the PLAZA platform
List of documents to take into consideration	<ul style="list-style-type: none"> • Horizon Europe Model Grant Agreement • EIT Manufacturing Strategic Agenda • Appeal procedure • List of KPIs • Eligibility of expenditures • Proposal template • Financial Support Agreement
Evaluation criteria	<p><i>Evaluation criteria assessed by the independent experts:</i></p> <ul style="list-style-type: none"> • Excellence, novelty, and innovation, • Impact and financial sustainability • Quality and efficiency of the implementation, including sound financial management • Strategic fit

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. Proposals addressing the EIT Manufacturing Pioneering Learning Journey – Master & Doctoral School 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 January 2024.

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 innovation
- Accelerate green manufacturing
- Foster competitive and resilient manufacturing

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 participate³

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 Regulation⁴ 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 Overseas Countries and Territories (OCTs) linked to the Member States.
- the countries associated to Horizon Europe and the low- and middle-income countries⁵;

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:

- 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.

³ 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.

⁴ 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)

⁵ See the Horizon Europe List of Participating Countries on the Portal for an up-to-date list of these countries

Please consider that:

- for applicants based in the United Kingdom their participation follows the conditions described [here](#)
- 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.

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 € |
| ▪ 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 and is participating in a funded project will still have to pay membership fees.

More information on the partnership models is available on the website⁶.

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

At most, the following number of affiliated entities/LTPs 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

Please take this into consideration 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](#) to obtain a [PIC number](#) and to register in the Plaza Submission tool⁷. 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.

⁷ Links to the submission tool are provided on page 8.

⁷ Links to the submission tool are provided on page 8.

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.
- 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 Regulation⁸). 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.

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

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

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. With its focus on the human-centric manufacturing, the Education pillar aims to engage, connect and empower as many students as possible to become the backbone of a strong European Manufacturing Innovation Community: a prosperous and inclusive society.

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

The Pioneering Learning Journeys Call covers only the segment 1.6 Pioneering Learning Journeys, related to Master and Doctoral School, to develop the following EIT Labelled journeys for students and professionals:

- Summer School 2024 for EIT Manufacturing Master School
- Doctoral I&E programme 2024

The focus for 2024 is to scale up the results of the Master and Doctoral School activities multiplying the impact of the same through commercialization and distribution within a wide number of learners or companies. The proposals must make use of highly innovative education and training solutions; and exploit and build on available assets, resources, programs, networks and collaborations, even developed in the previous years (Please refer to Annex A and ANNEX B for further information on EITM Master and Doctoral School and to ANNEX C for the EIT Label handbook).

3.1. Call thematic and expected results

Innovative added value modules for EIT Labelled Master and Doctoral School programs, and open to selected external participants, mainly aiming at developing I&E and sustainability competences.

A short presentation of the Master School is provided in ANNEX A. A presentation of Doctoral School programme is provided in ANNEX B. These annexes allow the applicants to understand the context, where the selected Innovative added value modules will be delivered and to provide additional info, such as the expected Overarching Learning Outcomes (OLOs). Annex C provides the general framework of the EIT Label for degree programmes, for a better understanding of the Master and Doctoral School programmes and courses requirements.

For the Master School one module is expected:

- Summer School for EIT Manufacturing Master School programmes

For Doctoral School the target of the call is the annual Innovation programme. This programme will be integrated with the annual entrepreneurship programme provided by EIT Manufacturing:

Proposal must target specifically only one of the following sub-segments:

- Summer School for EIT Manufacturing Master School programmes
- Doctoral School Innovation programme

3.2. Summer School for EIT Manufacturing Master School programmes

Purpose

- The main purpose is to equip learners with Innovation and entrepreneurial skills and capabilities (see OLO table in ANNEX A)
- This Summer School is a mandatory activity of the EITM Master School programmes. It focuses on teaching innovation and entrepreneurship to the students in the context of manufacturing and its related societal challenges, such as, but not limited to, the four EITM flagships. It must include a strong usage of industrial challenges and innovative technologies to allow the students to practice on real business environment and to ideate new innovative product/services and startup concepts. The programme must include a social and networking programme as well, to develop professional network of students.
- For more info about the EITM Master School and its related OLOs, please have a look to Annex A.

NB Only 1 proposal is expected to be funded. The selection of the proposal will be based on the quality of the proposal as evaluated by External Experts (See Section 5).

Topic description

- Manufacturing focus: At least 2 EITM flagships, T&L factories and digitalization.
- I&E focus: IPR, Ethics and Startup creation

Target

- Master of Science students and professionals

Expected outcomes & impacts

- Make engineering and ICT MSc students and manufacturing professionals to be able to gain soft skills and skills about innovation and also to get entrepreneurial concepts to start developing a business idea
- In terms of number of students, the summer school will train all EITM Master School students and must engage 20 external additional students, with a minimum of 7 RIS students.

Examples

Some examples of specific types of activities that can be addressed during the master summer school include:

- IPR labs
- T&L factories lab
- Startup bootcamps, where the students work to define an early-stage idea of possible startup
- Innovation labs, such as using programming for innovating manufacturing products/services, use art labs for creativity development etc.

3.2.1. Duration

The activity will last 1 year, with the summer school duration of minimum 16 days, with at least 10 working weekdays in presence (5 ECTS equivalent, where 1 ECTS=25 hours, including both study in classroom and study time outside classroom) to be delivered in summer 2024. The format can be in a row of three weeks or inside a period of 6 weeks. More than one location is allowed for the activities on site. The on-site programme must be organized in self-containing modules of 1 week each, to allow external participants to join either for 1 or 2 weeks in presence. Anyway, participants need to develop and gain increasing skill levels along the programme, meaning it is not possible to repeat the same programme twice along the 2 weeks. The programme can include social and cultural activities in the evening and during the weekend as integral part of the learner experience. See additional information in the Logistic specific requirements section 3.2.4.

3.2.2. Applicants profile

The following requirements apply to the proposal consortia:

- One organization participating in the proposal's consortium should undertake the role of the Activity Leader for the duration of the overall activity. The Activity Leader will be the direct contact with the EIT Manufacturing Education Pillar;
- The Activity Leader is responsible for the coordination of the activity, including the implementation of the workplan, the execution of the budget, the submission of the deliverables, and the impact achievements of the overall activity. The role of Activity Leader is open to any entity participating to the call for proposals;
- Consortia must include 5-10 entities, and at least one for each of the following categories: Universities, RTOs, Manufacturing companies, geographically based in at least 2 different EIT Manufacturing CLCs (geographical area detailed in the map in Annex I);
- Consortia must include minimum 1 entity from EITM Master School partner universities, able to provide ECTS to the EITM Master School students; and
- Consortia must include Minimum 1 entity from RIS Countries.

The role of each partner should be clearly described in the partners' role table.

3.2.3. Core KPIs

Every proposal must contribute to one of the KPI accordingly to the 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 would be possible); it will remain as it is for the target to be achieved by the end of the activity.

KPI	Short title	Minimum Target
EITHE08.1	Number of participants in (non-degree) education and training	20
EITHE08.2	Number of EIT RIS Participants in (non- degree) education and training	7

- Minimum number of students:

- expected 45 from EITM Master School (in 2024), with free access to all activities and paid accommodation. These students are counted into EITM Master School students, so they are not included into the KPIs above to avoid double counting.
- Minimum 20 external students, with special attention to women and RIS (Minimum 7) students' involvement. A students recruitment plan and a selection committee must be proposed for the selection of the external students (while applications will be managed through a centralized SW provided by EITM). External students pay a participation fee and also travel and accommodation expenses. The students recruitment plan must include specific actions to attract women and RIS students, besides fee discounts.

3.2.4. Specific requirements

Pedagogical Approach

Learning by Doing approach is required with strong focus on all OLOs (see ANNEX A), manufacturing societal challenge systemic view and business exploitation projects, based on real industrial challenges, provided by industries. Novel pedagogical approaches (gaming, AI/VR, hackathons etc.) are encouraged, also for activities listed as seminars. Moreover, experts from different fields are welcome (science, art, game, sport, makers, press, influencers etc.), but the students must be able to contextualize their new skills and capabilities inside manufacturing sector and associated societal challenges. Inclusion of T&L factories and networking opportunities with industries are also strongly encouraged. Students must be allowed to get reflection tools and time about their new skills and capabilities.

Quality review

A specific quality review plan of the whole summer school organization and programme must be included into the proposal.

Evaluation of students OLOs achievement and activity quality review by the learners and teachers must be included. A students evaluation committee made of Scientific and Industrial representative experts must be appointed.

Partnership

Master School University partners are only those ones already members of the Master School consortium at the time of the opening of the first stage of this call in 2023. External

organizations and professionals not associated to EITM can join either as external partners, willing to pay the affiliation fee to EIT Manufacturing for year 2024, or as subcontractors, in this case they will be selected by the winning consortium through public procurement.

Demonstrated engagement and active participation (teaching, networking, provide industrial challenges etc.) of companies and I&E experts (both professionals and companies are allowed). An educational I&E expert must be appointed as supervisor (Programme Coordinator) of the Summer School programme. This role can be done by a consortium partner or by an external expert, eventually through subcontracting. In this second case the consortium must present the criteria for the educational I&E supervisor selection. A students evaluation committee made of Scientific and Industrial representatives, expert in I&E, must be established as well for students OLOs evaluation (see also Quality review specific requirements).

Logistics

More than one location is allowed for the activities on site. EITM Master students accommodations paid by the grant; travels to/from summer school location(s) are excluded. External students must organize travel and accommodation by themselves. Organizer must organize EITM Master students accommodation and provide support to find accommodation to other external students. Travel expenses (not accommodation expenses) during summer school (for instance for company visits and social activities) are under organizers responsibility and are covered by the grant for all students.

Digital Learning

Digital learning content modules development to be provided to the students is also encouraged. The resulting material will be included into the EITM Skill.move platform for future re-use and treated according to platform guidelines. The participants must check that the content is not already available in Skill.move. If the content is similar to already existing nuggets and learning path, it can be approved, if it uses a different pedagogical method, approach, target sector, etc.

Communication & dissemination plan

A communication and dissemination plan must be provided for the programme, including the active participation of the participating students, I&E experts, industrial partners, teachers and other stakeholders. Participants success stories must be collected and highlighted during the

communication campaign. A communication and dissemination programme and content for the EITM Social Media channels and the EITM communication other channels, such the EITM website, Agora etc. must be prepared by the consortium and provided to the EITM Master School office during the activity for the promotion and the dissemination of the activity through EITM channels, and overall through the EITM Master and Doctoral School LinkedIn profile. A preliminary programme of the summer school with the activity calendar must be provided by mid February 2024, in order to allow EITM to create the programme brochure and to promote the programme through its own channels. In any case it is consortium responsibility to engage the external students.

3.3. Doctoral School annual programme 2024

Purpose

The purpose is to equip learners with Innovation and Entrepreneurial skills and capabilities (see OLO table in ANNEX B). The call focuses on the delivery of the innovation aspects of the Doctoral School annual programme:

- Spring School
- Summer School
- Winter School
- Innovation online short courses
- Industrial and innovation challenges and mentorship

Topic description

- Manufacturing focus: The innovation activities must focus on minimum 2 of the EITM flagships
- ECTS: 1 ECTS=25 hours, including both study in classroom and study time outside classroom. Please note ECTS are considered toward student/group of students-class.

The programme must include a series of online short courses, a Spring School on site event involving a manufacturing company providing a business-hackathon, an on site summer school and an on site winter school in relation to the Manufacturing focus above. The on site activities will host some of the entrepreneurship programme activities coordinated by EITM Doctoral School, already included into the ECTS of the programme. For this reason the proposal must consider logistic expenses and coordination for the entrepreneurship sessions as well.

The programme must focus on delivery of Innovation training in line with the Manufacturing focus listed above and covering all the OLOs listed in ANNEX B.

IMPORTANT: All the sessions are integrated into a wider Entrepreneurship Programme coordinated by the EITM Doctoral School. Each session delivers specific activities and host some of the Entrepreneurship Programme activities. For this reason each proposal must include a co-creation session at the beginning of the activity, in January 2024, in order the full I&E programme can be successfully designed and the full year activities calendar communicated to the students by end of January 2024.

General requirements

- Industrial challenges:
 - Minimum two industrial business challenges for the Spring School, according to the following requirements:
 - One challenge related to strategic goals for a new business and market development, or strenghtening/expanding existing business lines
 - One challenge related to strategic goals for strenghtening and optimizing the internal organization (production, logistic, technology, etc.
 - Minimum one industrial challenge about innovation market opportunities (i.e. opportunities for sustainable packaging) for the Market Exploration Bootcamp during the Summer and Winter School. The challenge must be linked to consumer end users (i.e. B2C), in order the students to be able to connect with stakeholders. B2B challenges , a support from the consortium to identify business stakeholders must be consider. In case one multiple locations the challenge must target all Regions/Countries. The challenge(s) could be used across the whole year.
 - Mentoring support by the industrial company/research centres to students about the provided challenges, the online courses topics and innovative business models:
 - during the onsite events (Spring, Summer and Winter School) the support can be provided either on site or online.

- along the year the support can be provided online

Spring School

The Spring School delivers the Welcome Ceremony of the Doctoral School annual opening, an industrial business hackathon in collaboration with the entrepreneurship programme and networking and social activities.

- Delivery time and duration: Minimum 5 working weekdays in presence (2 ECTS equivalent) to be delivered between 3rd and 16th April 2024. The social and cultural activities of the programme can be delivered in the evening and during the weekend(s).
- Delivery mode: either in presence or hybrid, meaning part in presence and part on line.
- Programme requirements:
 - Minimum 1 academic interactive lecture/lab experience
 - Minimum 1 social event
 - Minimum 1 company visit/company lecture/best practice
 - Networking activities with consortium and ecosystem of the hosting institution
 - Minimum 2 industrial business challenges to be provided to the students (see general requirements)
 - Hosting space and logistic coordination for the industrial business hackathon, coordinated by the entrepreneurship experts, for an average of 30 students:
 - 1 intro session of 4 hours
 - 4 sessions of 6 hours per day
- Industrial business challenges requirements:
 - One challenge related to strategic goals for a new business and market development, or strengthening/expanding existing business lines
 - One challenge related to strategic goals for strengthening and optimizing the internal organization (production, logistic, technology, etc.

Summer School

- Delivery time and duration: Summer School duration is min 10 working days, with at least 10 working weekdays in presence in a row (5 ECTS equivalent) to be delivered in July 2024. More than one location is allowed. The social and cultural activities of the programme can be delivered in the evening and during the weekend(s).
- Delivery mode: either in presence or hybrid, meaning part in presence and part on line.
- Programme requirements:
 - Summer Symposium
 - One or more interactive and hands on technological Seminars/workshops;
 - Minimum one industrial challenge about innovation market opportunities (see general requirements section above)
 - Ecosystem connections (i.e. company visits), Mentorship & best practices by industrial partners & networking event: networking activity series
 - Social and networking programme must be included, on top of mandatory networking activities with industries
 - Hosting space and logistic coordination for the following entrepreneurship programme sessions, for an average of 30 students each:
 - Market Exploration Bootcamp (MEB)
 - Closure of the programme

Winter School

- Delivery time and duration: min 10 working days, with at least 10 working weekdays in presence in a row (5 ECTS equivalent) to be delivered within 18th November to 10th December 2024. More than one location is allowed for the activities on site. The social and cultural activities of the programme can be delivered in the evening and during the weekend(s).
- Delivery mode: either in presence or hybrid, meaning part in presence and part on line.
- Programme requirements:
 - One or more interactive and hands on technological seminars/workshops for a total of 1 ECTS (the topics can be complementary to the webinars and the Spring and Summer School ones)
 - Minimum one industrial challenge about innovation market opportunities (see general requirements section above)
 - Ecosystem connections, mentorship & best practices by industrial partners & networking event: networking activity series

- Social and networking programme must be included, on top to mandatory networking activities with industries
- Hosting space and logistic coordination for the following entrepreneurship programme sessions, for an average of a 30 students class:
 - “Business Design Bootcamp” (B D B) hosting space and logistic coordination support (2 ECTS)

Each seminar/workshop can include offline preparation and student reflection time. They must include student skills and knowledge assessment.

Online Short Courses

A series of six on line short courses in collaboration with industries of min 12,5 hours and max 16 hours each about:

- Manufacturing and Industrial Insights and Tendencies – on 30th and 31st May 2024
- Challenges of the Supply Chain in Manufacturing – 20th and 21st June 2024
- Technology as a Driver for Solution Design – 16th and 17th September 2024
- The issues and developments of Digital Manufacturing – 16th and 17th October 2024
- Sustainable, Social, and Ethical Manufacturing – 24th and 25th October 2024
- Prototyping Design constraints and Industrial Feasibility – 12th and 13th December 2024

Each online short course must include:

- eventual preparation material and homework, online session training, student reflection time, student skills assessment.

Each online short course must involve:

- Manufacturing Industrial/startup involvement
- Research centers and other organization types (policy, social science, etc.), if appropriate

Pedagogical approach: learning-by-doing (use cases, best practices, testimonies, serious games, etc.)

Target

PhD students, researchers and professionals

Expected outcomes & impacts

- Make PhD students, researchers and manufacturing professionals to be able to gain soft skills and skills about innovation and also to get entrepreneurial concepts to start developing a business idea
- In terms of n. of students the proposal will train all EITM Doctoral School students and we expect the consortium to engage 10 external additional students per activity or group of activity

Examples

A Good example for summer/winter school is the Doctoral Summer School programme of 2023: <https://www.eitmanufacturing.eu/what-we-do/education/education-programmes/empower-programme/pioneering-learning-journeys/summer-school/>

Important: please read the main structure of the Doctoral I&E bi-annual programme to understand the specific included activities per year:

<https://www.eitmanufacturing.eu/what-we-do/education/education-programmes/empower-programme/pioneering-learning-journeys/ie-programmes/>

3.3.1. Duration

The activity will last 1 year, with each activity duration and delivery time as reported in their description in previous section.

3.3.2. Applicants profile

The following requirements apply to the proposal consortia:

- One organization participating in the proposal's consortium should undertake the role of the Activity Leader for the duration of the overall activity. The Activity Leader will be the direct contact for the EIT Manufacturing Thematic Pillar
- The Activity Leader is responsible for the coordination of the activity, including the implementation of the workplan, the execution of the budget, the submission of the deliverables, and the impact achievements of the overall activity. The role of Activity Leader is open to any entity participating to the call for proposals.
- Consortia must include 3- 8 entities (Universities, RTOs, Manufacturing companies)
- Consortia must include Minimum 1 entity from the EITM Doctoral

School consortium

- Consortia must include Minimum 1 entity from RIS Countries
- The role of each partner should be clearly described in the partners' role table.

List of EITM Doctoral School partner universities is available at Doctoral School web page: [EIT Manufacturing Doctoral School – EIT manufacturing.](#)

3.3.3. Core KPIs

Every proposal must contribute to one of the KPI accordingly to the 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
EITHE08.1	Number of participants in (non-degree) education and training	20
EITHE08.2	Number of EIT RIS Participants in (non- degree) education and training	10

- Min number of students:
 - expected 15 from EITM Doctoral School, with free access to all activities. These students are counted into EITM Doctoral School students, so they are not included into the KPIs above to avoid double counting.
 - Minimum 20 external students, with special attention to women and RIS students' involvement. A students recruitment plan and a selection committee must be proposed for the selection of the external students (while applications will be managed through a centralized SW provided by EITM). External students pay a participation fee and also travel and accommodation expenses. The students recruitment plan must include specific actions to attract women and RIS students, besides fee discounts.

3.3.4. Specific requirements

Pedagogical Approach

Learning by Doing approach is required with strong focus on all OLOs (see ANNEX B), manufacturing societal challenge systemic view and business exploitation projects, based on real industrial challenges, provided by industries. Novel pedagogical approaches (gaming, AI/VR, hackathons etc.) are encouraged, also for activities listed as seminars. Moreover, experts from different fields are welcome (science, art, game, sport, makers, press, influencers etc.), but the students must be able to contextualize their new skills and capabilities inside manufacturing sector and associated societal challenges. Inclusion of T&L factories and networking opportunities with industries are also strongly encouraged. Students must be allowed to get reflection tools and time about their new skills and capabilities.

Quality review

A specific quality review plan of each programme section and the whole spring & summer/winter school organization and programme must be included into the proposal. Evaluation of students OLOs achievement and activity quality review by the learners and teachers must be included. A students evaluation committee made of Scientific and Industrial representative experts must be appointed.

Partnership

Doctoral School University partners are only those ones already members of the Doctoral School consortium at the time of the opening of this call in 2023. External organizations and professional not associated to EITM can participate to the consortium under the requirements of section 2.4.2.4 EIT Manufacturing membership.

Logistics

Organizers are not responsible for providing travel arrangements. Participants will arrange their own travel to/from the location and the accommodation expenses. Only travels for the on site activities execution are eligible by the grant, including travels for networking sessions, company visits and social programme. The same rules are valid for other kind of programme activities along the year round, such as seminars, etc. In any case, for onsite activities, such as Summer/Winter school/, the consortium must provide logistic coordination, including support for finding accommodation, on site working space for courses, projects and hands-on

activities, site visits, social programme etc. More than one location is allowed for the activities on site.

Digital learning

blended activities are allowed. Digital learning content modules development to be provided to the students before the start of specific activities for a knowledge common baseline or during the programme activities is also encouraged. The resulting material will be included into the EITM Skill.move for future re-use, and treated according to Skill.move guidelines. The participants must check that the content is not already available in Skill.move. If the content is similar to already existing nuggets and learning path, it can be approved, if it uses a different pedagogical method and approach.

Marketing, Communication & Dissemination

a communication and dissemination plan must be provided for the programme. The consortia will execute the marketing, communication and dissemination activity during the programme providing the content description of the activities, the content for the communication to EITM Doctoral School for the publication on EITM SoMe channels, website and other communication tools such as newsletter etc. Participants success stories must be collected by the consortia and highlighted during the communication campaign. The communication and dissemination will be supported by the EITM Doctoral School office for the publication on EITM SoMe channels, website and other communication tools such as newsletter etc. The communication and dissemination activities will be integrated with the entrepreneurship part of the programme coordinated by the EITM Doctoral School office.

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 Agreement⁹.

⁹ https://ec.europa.eu/info/funding-tenders/opportunities/docs/2021-2027/common/agr-contr/general-mga_horizon-atom_en.pdf

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

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!

3.7 Budget and funding

The total maximum EIT funding allocated to this call is up to 560 000 EUR in 2024. The amounts will be allocated according to the evaluation score the proposal received. The amount is indicated in the table below.

Call Thematic	Indicative Budget	Maximum EIT funding per proposal
Summer School for EIT Manufacturing Master School programmes – 2024	300 000 EUR	Up to 300 000 EUR
Doctoral School annual programme 2024	260 000 EUR	Up to 260 000 EUR

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.

Only one proposal is expected to be funded per call thematic, based on the evaluation performed by External Evaluators.

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

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

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

Prior to the payment, the cumulative funding received by an individual entity in the Business Plan 2023- 2025 for all the EIT Manufacturing projects they participate in will be checked. Whenever an entity reaches a cumulative EIT funding of 430,000€, a Certified Financial Statement (CFS) audit will be requested prior to the payment¹⁰. The CFS audit will be performed by an external auditor. EIT Manufacturing will provide the reference of the appointed auditor.

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

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

¹⁰ According to Art 24.2 of the Horizon Europe MGA

3.8 Eligibility of expenditures

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

3.9 Financial sustainability

To enable EIT Manufacturing to gradually become financially independent from EIT funding, a Financial Sustainability (FS) Strategy has been defined in the form of Services Agreement. This strategy is based on a mix of both active earned income and passive investment revenue.

For this call, the suitable Services Agreement that the applicants can select are the:

- Participation Fee,
- Revenue Sharing with a minimum of 50% for EIT Manufacturing.

The selected project shall lead to the commercialization of the proposed trainings and/or service (such as consulting and maintenance).

The initial proposed financial sustainability contribution will be revised prior to the project start and during the project implementation.

3.10 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 Financial Sustainability Agreement (please refer to Section 3.9) and the KPIs targets (please refer to Section 3.4) cannot be renegotiated/reduced after the start of the activity.

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

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.

3.11 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 3 months of the activity
Financial Sustainability Agreement	Month 9
Gender equality plan	Within the first 6 months of the activity. Only public or private research organizations or higher education establishment.
Publishable summary of achievements to be used as dissemination material by EIT Manufacturing	By the end of the activity

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 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
Info Day	October 3rd 2023 at 10:00 AM CEST
	October 12 th 2023 at 14:00 CEST
	Ocotber 18 th 2023 at 17:00 CEST

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.

The deadline for the submission of the proposals is: 29th 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 29th November 2023:

- Application form

NB: Any documentation missing or considered incomplete, may be a reason for application rejection. No documentation will be accepted after the deadline.

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; 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.

A proposal will be eligible if it shows:

1. Consortia composition	<u>The consortium shall be composed by at least 3 legal entities independent from each other and each established in a different country as follows:</u> <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.
4. Fit for purpose in terms of topic, duration, and budget	All proposals must fit with the topic selected, comply with the foreseen activity duration and maximum budget allocation.

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 and Strategic Fit.

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 20. The default threshold for individual criteria is 3 and the default overall threshold is 12.

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: X%
Coherence	
The aim and the objectives of the proposals are clearly related to outcomes and results.	1-5
The proposal outcomes/outputs have been specified in relation to the expected trainings/service/solution.	1-5
Novelty	
The proposal demonstrates its need and relevance for target group or market.	1-5
Impact: social, economic, financial, and sustainability	Max. scoring: 5 Threshold: 3/5 Weighting: X%
Ambition and contribution to expected impact	
The proposal's expected impacts are measurable at a quantitative and a qualitative level.	1-5
The proposal provides a credible strategy for financial sustainability.	1-5
Competitiveness and growth	
The proposal defines measures to include a gender and RIS perspective	1-5

Effectiveness of the proposed measures to exploit and disseminate the results (including IPR management), to communicate the results and to manage data (if applicable)	
The proposal describes a clear commercialisation and exploitation strategy (keeping into consideration measures for IPR management according to MGA Art.16 if necessary), and when applicable a marketing and sales plan.	1-5
Implementation and sound financial management	Max. scoring: 5 Threshold: 3/5 Weighting: X%
Workplan, including allocation of budget, tasks, and resources	
The workplan is aligned to the achievement of proposal objectives, KPIs and expected results.	1-5
The proposal properly identifies deliverables, milestones including respective timelines	1-5
Management structures and procedures, including quality management and risk management	
The proposal identifies management structures to guarantee an effective management of the proposal resources and applicants, risks and mitigation measures.	1-5
Consortium fit for purpose	
The applicants represent the right competencies, skills and expertise in accordance with the proposal scope.	1-5
Strategic fit evaluation criteria	Max. scoring: 5 Threshold: 3/5 Weighting: X%
Contribution to EIT Manufacturing strategic objectives (EIT Manufacturing Strategic Agenda), to the EIT Core and EIT Manufacturing specific KPIs	1-5

Fitting with Call scope and EIT Manufacturing challenges at which the activity proposal has been submitted (section 3) and Addressing the concept of Knowledge Triangle	1-5
---	-----

The total scoring of 20 points is distributed as follows:

Excellence	Max score 5 Threshold: 3/5 <i>Weighting: 25X%</i>
Impact	Max score 5 Threshold: 3/5 <i>Weighting: 25%</i>
Implementation	Max score 5 Threshold: 3/5 <i>Weighting: 25%</i>
Strategic Fit	Max score 5 Threshold: 3/5 <i>Weighting: 25%</i>
Total	<i>20 points</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).

5.3 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, for 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.

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

5.4 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)

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 Regulation¹¹. 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

¹¹ <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 Agreement¹².

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.

¹² https://ec.europa.eu/info/funding-tenders/opportunities/docs/2021-2027/common/agr-contr/general-mga_horizon-atom_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 Agreement¹³ signed between the EIT and EIT Manufacturing and particularly Articles 12 (conflict of interest), 13 (confidentiality and security), 14 (ethics), 17.2 (visibility), 18

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

(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.

ANNEX A

Master School programmes and Overarching Learning Outcome (OLOs)

EITM Master School outlook

The EIT Manufacturing Master School offers a unique and excellent high education programme, with international and inclusion mindset, to graduate the next generation of Manufacturing Innovators and Entrepreneurs. The Master School programmes merge manufacturing technical and technological aspects with innovation and entrepreneurship teaching, in the context of the global societal challenges, such as circular economy, industrial innovation, sustainability, and so on. The EIT Manufacturing Master School adopts a practical learning by doing approach, through activities at Teaching and Learning Factories, through internships, projects and thesis at industrial premises, and through Innovation and entrepreneurship focused Summer Schools, in order the students to put immediately in practice the new knowledge, gathered in the class, in a real work and research context. The international studies at two different universities and the interaction with the EIT Manufacturing community complement and complete the educational offer.

All EIT Manufacturing Master School programmes allow the students to develop:

- Capability to implement engineering expertise and advanced technologies to create new or improved methods, techniques, products and services in the manufacturing field, in line with the customer target sector and the global societal challenges.
- Transversal skills and capabilities, such as constructive communication, leadership, complex problem setting, problem solving and decision making, to collaborate in international and diverse contexts, to manage projects and teams, to find new solutions and innovate the manufacturing offer.
- Business understanding and entrepreneurship to boost their future careers and to create innovative start-ups.

These capabilities are defined for the Master School programmes directly by the EIT, through the EIT Label handbook provided in ANNEX C and in particular through specific Overarching Learning Outcomes (OLOs), reported in the next section of this annex.

The EIT Manufacturing Master School Programmes are:

- People and Robots for Sustainable Work
- Additive Manufacture for Full Flexibility
- Zero-Defect Manufacture for a Circular Economy

- Platforms for digitalized value networks
- Data Science ad AI for Competitive Manufacturing

At the end of their studies the students receive two degrees directly by the universities (double degree) and the EIT label certificate from EIT Manufacturing, as an international recognition of their high-quality education curriculum. In fact, all the EIT Manufacturing Master School programmes award the EIT Label accreditation directly from EIT.

The current call focuses on collecting proposals that will deliver:



- The mandatory Summer School (focused on I&E), that EITM Master School students must attend between first and second year, in 2024

EITM Master School students have free access to the mandatory Master Summer School. Moreover, the Master Summer School is open to external students under a specific fee to be proposed during the proposal preparation by the consortium.
Master School partner Universities

In case partnership requires to include one or more of the EITM Master School partner Universities, you can find their public contacts at EIT Manufacturing partners web page: Master School - EIT Manufacturing

List of those partners is available here below.

	Aalto University (Aalto), Finland
	Ecole Centrale de Nantes (ECN), France
	Mondragon Unibertsitatea (MU), Spain
	Politecnico di Milano (POLIMI), Italy
	University of Applied Sciences and Arts of Southern Switzerland (SUPSI), Switzerland
	Technische Universität Wien (TU Wien), Austria
	University College Dublin (UCD), Ireland
	Grenoble Institute of Technology and Management (G INP), France

 UNIVERSITY OF TRENTO	University of Trento (UNITN), Italy
	University of TARTU (TARTU), Estonia

Overarching Learning Outcome (OLO) for EITM Master School Programmes

EIT Overarching Learning Outcome (OLOs): see table below

EIT OLOs
EIT OLO 1 - Entrepreneurship skills and competencies
The capacity to identify and act upon opportunities and ideas to create social, cultural and financial value for others, including translating innovations into feasible business solutions, with sustainability at their core.
EIT OLO 2 - Innovation skills and competencies
The ability to formulate knowledge, ideas and technology to create new or significantly improved products, services, processes, policies, new business models or jobs, and to mobilise system innovation to contribute to broader societal change, while evaluating the unintended consequences of innovation and technology.
EIT OLO 3 - Creativity skills and competencies
The ability to think beyond boundaries and systematically explore and generate new ideas.
EIT OLO 4 - Intercultural skills and competencies
The ability to engage and act internationally and to function effectively across cultures, sectors and/or organisations, to think and act appropriately and to communicate and work with people from different cultural and organisational backgrounds..
EIT OLO 5 - Making value judgments and sustainability competencies
The ability to identify short- and long-term future consequences of plans and decisions from an integrated scientific, ethical and intergenerational perspective and to merge this into a solution-focused approach, moving towards a sustainable and green society.
EIT OLO 6 - Leadership skills and competencies
The ability of decision-making and leadership based on a holistic understanding of the contributions of Higher Education research and business to value creation, in limited sized teams and contexts

ANNEX B

Doctoral School programmes and OLOs

The EITM Doctoral School (DS) offers an annual Innovation & Entrepreneurship (I&E) programme to Ph.D. students, to prepare them to create start-ups, to be leaders of innovation within manufacturing companies and ecosystem, and to contribute to European competitiveness and environmental sustainability. The Doctoral School framework is based on the EIT Label, accredited directly from EIT and based on the EIT Label handbook for degree programme available in ANNEX C. This call relates to the organization of the Innovation aspects of the Doctoral School I&E annual programme for 2024.

EITM Doctoral School Programme structure

The structure of the Doctoral School annual programme about Innovation and Entrepreneurship includes a series of on line and on site activities, including:

- Welcome ceremony (on-boarding of new students, included into the Spring School), Network-wide activities in collaboration with industries, startup and research centers.
- Seminars/webinars and hackathons, given through either on-line (using Skill.move) or face to face courses etc.
- Summer school: including a doctoral symposium where students can present their ongoing research activities and get feedback from peers.
- Winter school: students can get advanced knowledge and practice and present results of their work about Innovation and Entrepreneurship.
- Awareness & Orientation programme: dedicated to those Doctoral School students interested to develop innovative product/services, but not towards a business venture.
- Business Creation Venture programme: dedicated sessions offering to doctoral students working on manufacturing challenges across Europe and their own ideas of start-up from the results of their PhD studies. The goal of this programme is to help these doctoral students to strengthen their entrepreneurial spirit, to improve their creativity and system innovation skills. The programme includes training boot camps, company visits, business coaching, global networking events, and online resources.

The full annual programme must provide 30 ECTS equivalent in total, where 1 ECTS corresponds to 25 hours of training/activities in classroom and study time outside the classroom. The programme mainly focuses on , but is not limited to, the EIT Manufacturing thematic areas and Manufacturing main societal challenges objectives.








Doctoral School partner Universities

Partnership must include at least one of the EITM Doctoral School partner Universities

You can find their public contacts at EIT Manufacturing partners web page: <https://eitmanufacturing.eu/partners/>

*Please note: For FEUP, contact is Gil Gonçalves: gil@fe.up.pt (being FEUP a LTP, the contact is not available at the partners web page).

List of those partners is available here below.

	Arts et Métiers Institute of Technology (Arts et Métiers)
	Czech Technical University of Prague (CTUP)
	Grenoble Institute of Technology and Management (GINP)
	Slovak University of Technology in Bratislava (STUBA)
	Faculty of Engineering of the University of Porto (FEUP)
	University of Tartu – Institute of technology (TARTU)
	Mondragon Unibertsitatea (MU), Spain

Doctoral School Overarching Learning Outcomes (OLOs)

EIT Overarching Learning Outcome (OLOs): see table below

EIT OLOs
EIT OLO 1 - Entrepreneurship skills and competencies
The capacity to identify, synthesize and act upon opportunities and ideas to create social, cultural and financial value for others, including translating innovations into feasible business solutions, with sustainability at their core, and to lead and support others in this process.
EIT OLO 2 - Innovation skills and competencies
The ability to evaluate the research experiences combined with the knowledge, ideas and technology of others to create, test and implement new or significantly improved products, services, processes, policies, new business models or jobs, and to mobilise system innovation to contribute to broader societal change, while evaluating the unintended consequences of innovation and technology.
EIT OLO 3 - Creativity skills and competencies
The ability to extend boundaries and systematically explore and generate new ideas and to inspire and support others in this process and contribute to the further development of those ideas.
EIT OLO 4 - Intercultural skills and competencies
The ability to engage and act internationally and to function effectively – in research and other activities – across cultures, sectors and/or organisations, to think and act appropriately and to communicate and work with people from different cultural and organisational backgrounds.
EIT OLO 5 - Making value judgments and sustainability competencies
The ability to identify short- and long-term future consequences of plans and decisions from an integrated scientific, ethical and intergenerational perspective and to merge this into their professional activities, moving towards a sustainable and green society.
EIT OLO 6 - Leadership skills and competencies
The ability of decision-making and leadership based on a holistic understanding of the contributions of Higher Education, research and business to value creation.

ANNEX C

EIT Label handbook for degree programmes

“Quality for learning” EIT Quality Assurance and Learning Enhancement Model

EIT Label Handbook for planning, labelling and reviewing degree
programmes

Revised Edition (June 2021)

The EIT – Making Innovation Happen

European Institute of Innovation and Technology (EIT)

www.eit.europa.eu



The EIT is a body of the European Union

The revised edition of the 'Handbook for planning, labelling and reviewing EIT-labelled Master's and Doctoral programmes' has been produced by the EIT with contribution from the KICs. The original and revised editions are based on the work of Professor Lena Adamson, and on work of experts Richard Tunstall and Jaana Puukka.

Contents

Abbreviations	4
Introduction	5
EIT – European Institute of Innovation and Technology	5
Handbook objectives	6
EIT Quality Assurance and Learning Enhancement (EIT- QALE) model	7
Part 1: The EIT Label for degree programmes	8
The EIT Label and its components	8
Research and development (R&D) projects on KIC educational activities	8
The EIT Overarching Learning Outcomes (EIT OLOs)	9
Learning outcomes at programme level - ILOs and ALOs	11
Defining intended learning outcomes	11
The key principles	12
Knowledge Triangle Integration	12
Innovation & entrepreneurship (I&E) education	13
Highly integrated, innovative learning-by-doing curriculum	13
International engagement and mobility experience	13
Inter-sectoral and inter-organisational experience	13
Geographic inclusion	14
Inclusion, diversity and gender mainstreaming and equality	14
The EIT quality indicators and quality requirements	14
Part 2: Concepts and definitions	16
Entrepreneurship and Entrepreneurship education	16
The EIT added value	16
Quality in the context of the EIT educational agenda	16
Teaching and learning in the Knowledge Triangle	17
Knowledge forms in the EIT education agenda	17
Fit-for-purpose assessment	18
Criterion-based assessments	18
Active learning	19
Aligned teaching	19
Joint curriculum development	20
Joint programmes, joint degrees, double or multiple degrees	20
The European Approach for Quality Assurance of Joint Programmes	21

Part 3: Processes and working tools	22
Labelling of new degree programmes	22
The result and conclusions of the external review and the process of appeal.....	22
The EIT Labelling – step by step process.....	23
Regular monitoring and reporting on implementation of the programmes	24
Longer-term monitoring and follow-up evaluation	25
The independent external experts and their role.....	26
Working tools.....	26
The self-assessment report and the templates	26
The external review and the templates (Qi1-Qi4).....	27
Part 4: Guidance and templates for applicants.....	28
Guidance for compiling an application for the EIT Label	28
Guidance on ‘contextual information’	29
The long-term vision of the programme including expected impacts.....	29
The financial model of the programme	29
Risk analysis and mitigation plan	30
Template for EIT Label – Introduction (the applicant details and the communication factsheet)	30
Template for EIT Label – Contextual information.....	31
Template Qi1 for EIT Label – Compulsory requirements for degree programmes.....	32
Template Qi2 for EIT Label – Qualitative requirements for degree programmes	35
Guidance for monitoring and evaluation of EIT Label throughout the validity of the Label	41
Regular monitoring and reporting on implementation of the EIT-labelled degree programmes	41
Regular reporting by programme coordinators	41
Monitoring through the central EIT data model	42
Longer-term monitoring and follow-up evaluation of EIT-labelled degree programmes.....	43
Template Qi3 for the results, achievements, and impact of EIT Label degree programmes	44
Template Qi4 for the stakeholder experience and continuous improvement of the EIT Label	45
Part 5: Guidance and instructions for the external reviewers.....	48
Review of initial award of the EIT Label	48
Review of the Contextual Information for the initial award of the EIT Label	48
Review of the compulsory requirements for the initial award of the EIT Label - Template Qi1	49
Review of the Qualitative requirements for the EIT Label - Template Qi2	50
Final conclusions and Recommendations Template for Reviewers	51
Review for the longer-term follow-up evaluation of the EIT-labelled degree programmes	53
Template for the expert team - Final Conclusions and recommendations (long-term follow-up evaluation)	54

Abbreviations

ALO	Achieved Learning Outcome
CEO	Chief Executive Officer
CLC	Co-location Centre
DG EAC	Directorate General for Education and Culture
DS	Diploma Supplement
ECTS	European Credit Transfer System
EIT	European Institute of Innovation and Technology
ENIC-NARIC	European Network of Information Centres - National Academic Recognition Information Centre
ESG	European Standard and Guidelines
EQF	European Qualification Framework
HEI	Higher education institution
ILO	Intended Learning Outcome
I&E	Innovation and Entrepreneurship
JRC	Joint Research Centre
KIC	Knowledge and Innovation Community
KTI	Knowledge Triangle Integration
NGO	Non-Governmental Organisation
NQF	National Qualification Framework
OLO	Overarching Learning Outcome
QA	Quality Assurance
QALE	Quality Assurance and Learning Enhancement
Qi	Quality indicator
QF EHEA	Qualification Framework of European Higher Education Area
R&D	Research and Development
RIS	EIT Regional Innovation Scheme
SPOC	Single Point of Contact

Introduction

EIT – European Institute of Innovation and Technology

The EIT was established in 2008 to increase the EU's ability to innovate and contribute to sustainable economic growth and competitiveness. It has pioneered the integration of education, research and innovation, and business creation (i.e. the 'Knowledge Triangle'), with a strong emphasis on entrepreneurial talent and innovation skills¹.

The EIT operates through its Knowledge and Innovation Communities (KICs). As referred to in Horizon Europe, KICs are large-scale European partnerships between education, research and business organisations. There are currently eight EIT KICs that operate in the following areas: climate change, digital transformation, energy, food, health, raw materials, urban mobility and manufacturing.

Each KIC is organised around co-location centres (CLCs²) which act as geographical hubs for the practical integration of the Knowledge Triangle. They are organised and structured according to their regional and national innovation context and they build on a pan-European network of existing labs, offices or KIC partner's campuses.

The EIT KICs run a portfolio of Knowledge Triangle activities:

- *Education and training activities* with strong entrepreneurship components to train the next generation of talents, including the design and implementation of programmes awarded the EIT Label. The EIT's education agenda is key for developing highly entrepreneurial and skilled innovators.
- *Activities supporting innovation* to develop products, processes and services that address a specific business opportunity.
- *Business creation and acceleration activities*, such as accelerator schemes to help entrepreneurs translate their ideas into successful ventures and speed up the growth process.

Focusing on societal challenges through the implementation of the Knowledge Triangle, is a distinctive feature of the EIT compared to other EU innovation instruments. The EIT's approach contributes to both incremental and disruptive innovations, effectively addresses market failures and helps to transform industries. It enables the creation of long-term business strategies for addressing societal challenges and helps create the conditions that are essential for a well-functioning innovation ecosystem to thrive. The EIT has also set the objective for the KICs to become financially sustainable. According to the EIT Regulation (recast)³, financial sustainability means "a capacity of a KIC to finance its Knowledge Triangle activities⁴ independently of contributions from the EIT". In this context, KICs must develop and implement revenue-

¹ See also Decision (EU) 2021/820 of the European Parliament and of the Council of 20 May 2021 on the Strategic Innovation Agenda of the European Institute of Innovation and Technology (EIT) 2021-2027: Boosting the Innovation Talent and Capacity of Europe and repealing Decision No 1312/2013/EU ('EIT Strategic Innovation Agenda 2021-2027', OJ L 189, 28.5.2021, p. 91).

² In accordance with Article 2(3) of the EIT Regulation (recast), a 'co-location centre' means a physical hub, established in an open and transparent manner, which promotes links between and active collaboration among knowledge triangle actors and acts as a focal point for knowledge exchange and through which the KICs' partners are able to access facilities and the expertise needed to pursue their common objectives.

³ 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) ('EIT Regulation (recast)', OJ L 189, 28.5.2021, p. 61)

⁴ As defined in point (16) of Article 2 of the EIT Regulation (recast).

creating strategies in order to maintain their innovation ecosystem and Knowledge Triangle activities beyond the period covered by the grant agreements.

The EIT thus offers a dynamic platform for launching, scaling up, monitoring and supporting KICs with strong network effects and positive spill-overs. The first wave of KICs (EIT Digital, EIT Climate-KIC and EIT InnoEnergy), launched in 2009, are established and mature. After 2024, in line with the maximum grant duration, their partnership agreements cannot be further extended and will therefore expire. A second generation (EIT Health and EIT RawMaterials) and third generation (EIT Food) of KICs were designated in 2014 and 2016, respectively. EIT Urban Mobility and EIT Manufacturing, two KICs designated in December 2018, started their operations in 2019. In the next step, the EIT Strategic Innovation Agenda 2021-2027 presents the creation of a new EIT Knowledge and Innovation Community, in the cultural & creative sectors and industries.

The KICs' higher education partners focus on building upon existing excellence in education to provide students, entrepreneurs and business innovators with the knowledge, competences and skills necessary for a knowledge economy and an entrepreneurial, sustainable society. These innovative programmes are based on partnerships between different universities, companies, public bodies, NGOs, and research centres that collaborate closely and offer international and cross-sectorial mobility experiences, as well as applied innovation and entrepreneurship education.

To scale up and elevate this positive effect, the EIT has launched a new pilot EIT Initiative: Innovation Capacity Building for Higher Education. Part of the EIT Strategic Innovation Agenda 2021-2027, it aims to increase the entrepreneurial and innovation capacity of higher education across Europe by promoting and supporting institutional change in HEIs and the integration of HEIs into innovation ecosystems. More specifically, the initiative aims to encourage these institutions to look at their own practices and develop concrete actions to increase their impact on their respective ecosystems. The EIT shall strengthen and widen the scope of the EIT label beyond the KICs to include the HEIs participating in the action. With the involvement of actors from across the knowledge triangle, the EIT shall strive to link its support for developing innovation capacity in higher education to the EIT Label.

Handbook objectives

The main objective of the EIT Label Handbook is to present the key principles of the EIT Label model, as provided in the EIT Label Framework⁵ and to ensure their implementation at degree education. In this regard, this Handbook outlines the EIT Quality Assurance and Learning Enhancement system (EIT-QALE) that aims to guarantee, and enhance, the quality and excellence of the EIT-labelled degree programmes.

This Handbook offers guidance and hands-on working tools for the design, development and review of the EIT-labelled degree programmes at master's and doctoral level. It is therefore an essential tool for the education coordinators, instructors and external reviewers of both master's and doctoral degree programmes.

This Handbook is divided into five main parts.

Part 1 introduces the EIT Label, its components, key principles and the underlying logic.

⁵ See Decision 11/2021 of the Governing Board of the EIT on the adoption of the new EIT Label Framework (Ares(2021)1930763).

Part 2 introduces the main concepts for EIT degree programmes to facilitate planning, labelling, reviewing and monitoring the EIT-labelled degree programmes.

Part 3 outlines the EIT Label assessment processes for the degree programmes: labelling new degree programmes, introducing changes to the labelled programmes and monitoring the programmes.

Part 4 provides guidance and templates for the application and the self-assessment of the EIT Label.

Part 5 provides guidance and templates for the external experts' reviews.

EIT Quality Assurance and Learning Enhancement (EIT- QALE) model

The EIT Label Framework⁶ introduces the EIT Quality Assurance and Learning Enhancement (EIT-QALE) Model, which represents the set of key principles to ensure that the EIT Label is consistently implemented in the education and training provision across the EIT KICs' education portfolios.

EIT-QALE enhances the implementation of the Overarching Learning Outcomes (OLOs) among learners and across the KICs' education and training portfolios and help to disseminate the experience across a large number of European higher education institutions, individual learners and other stakeholders.

The EIT QALE combines the OLOs with the EIT Label's key principles and underlying principles and guides the process of determining fitness *for* purpose and fitness *of* purpose. While fitness for purpose is related to the EIT's mission, fitness of purpose refers to the programme's capacity to satisfy the EIT's goals.

The focus of the EIT-QALE system on learning outcomes is in line with the Bologna process; it is also aligned with the Quality Assurance in the European Higher Education Area (ESG)⁷.

Accountability and enhancement are the two main purposes of the EIT-QALE⁸. It provides a transparent system for the quality assurance and enhancement of degree programmes, which is easy to understand and work with. It is:

- a user-friendly tool for planning and evaluating degree programmes;
- generic, with simple adjustments, so it can be contextualised and applied to different degree programmes regardless of content and/or level;
- evidence-based, as it builds on knowledge and research concerning evaluation and quality assurance in teaching and learning;
- focused on the EIT/KIC added value; and
- collaborative, as it engages stakeholders in the processes in order to create trust and motivation to use the system.

⁶ See Decision 11/2021 of the Governing Board of the EIT on the adoption of the new EIT Label Framework (Ares(2021)1930763)

⁷ <https://enqa.eu/index.php/home/esg/>

⁸ Högskoleverket (Swedish National Agency for Higher Education) (2009). Quality Evaluations in Learning, Report 2009, 25 R.

Part 1: The EIT Label for degree programmes

The EIT Label and its components

The EIT Label is a quality seal awarded to higher education degree programmes, irrespective of their level (master's / doctoral). It is a certificate of quality education in entrepreneurship and innovation and is provided by the EIT following an external and independent review. It indicates that a particular degree programme complies with the set of standards and principles articulated in the EIT Label Framework, and in this EIT Label Handbook, and enables students to achieve a specified set of learning outcomes.

All EIT-labelled programmes build on the following components:

- The EIT Overarching Learning Outcomes (EIT OLOs)
- The key principles

Should the implementation of the programmes require EIT funding, the development of the programmes must also build on (and in accordance with) the EIT's, and the KICs' Financial Sustainability strategy.

The focus of the EIT-QALE systems, and the key task for those involved in the design, implementation, and evaluation of the EIT-labelled degree programmes, is the *'EIT/ KIC added value'*:

- Do the EIT-labelled degree programmes ensure that students achieve the EIT Overarching Learning Outcomes (OLOs)?
- Are the key principles integrated in the programmes?

The assessment of any other aspects, including the Bologna requirements⁹, remains at the discretion of regional or national quality assurance systems. Consequently, the reviews for the EIT Label complement the accreditation processes that are based on national quality assurance systems for higher education.

Research and development (R&D) projects on KIC educational activities

In order to continuously improve the KIC's education offer towards modernization, excellence and Knowledge Triangle integration, the KICs are encouraged to run research and development projects on the curricula development, on the teaching for the Knowledge Triangle competences and on innovative pedagogical approaches. The projects develop as part of the EIT Community, and they can include research studies, evaluations, analysis, development activities. These projects should result in research that contributes significantly to teaching and learning knowledge in European higher education. When carried out, these projects can be also included in monitoring the long-term progress of the programme (see the assessment field 4.5 in the reviews).

⁹ See https://ec.europa.eu/education/policies/higher-education/bologna-process-and-european-higher-education-area_en

The EIT Overarching Learning Outcomes (EIT OLOs)

The general set of EIT Overarching Learning Outcomes (EIT OLOs) is outlined in the EIT Label Framework. The definitions of the EIT OLOs at master's and doctoral level (as provided in the Table 1 below) are fully coherent with the good practice in entrepreneurship education at European level, such as the European Entrepreneurship Competence Framework, EntreComp¹⁰, and will allow for tailored application for the types of programmes that EIT and the KICs are trying to promote. The EIT OLOs complement the intended learning outcomes of the Qualification Framework of European Higher Education Area (QF-EHEA, 'the Bologna framework').¹¹

The main objective of EIT-labelled master's and doctoral programmes is to ensure that the learners achieve the EIT OLOs. The degree programmes should therefore provide the learners with opportunities to develop entrepreneurship skills and competencies and Knowledge Triangle integration skills.

The EIT OLOs are integrated into the teaching, learning and assessment of all EIT-labelled degree programmes. They are contextualised and seamlessly integrated into a thematic field of their studies in order to foster innovative and entrepreneurial mindsets based on the Knowledge Triangle. The KICs and their education partners are free to decide on how to achieve this goal. The EIT OLOs are also transformed into more specific learning outcomes for programmes, modules and courses in order to equip the students with the desired skills and competencies.

¹⁰ See: <https://ec.europa.eu/jrc/en/publication/eur-scientific-and-technical-research-reports/entrecomp-entrepreneurship-competence-framework>.

¹¹ Qualification Framework of European Higher Education Area (EHEA). Available at [2015-10-22]: <http://www.ehea.info/article-details.aspx?ArticleId=67>

Table 1. EIT Overarching Learning Outcomes (EIT OLOs)

Master's Programmes	Doctoral Programmes
EIT OLO 1 - Entrepreneurship skills and competencies	
The capacity to identify and act upon opportunities and ideas to create social, cultural and financial value for others, including translating innovations into feasible business solutions, with sustainability at their core. ¹²	The capacity to identify, synthesize and act upon opportunities and ideas to create social, cultural and financial value for others, including translating innovations into feasible business solutions, with sustainability at their core, and to lead and support others in this process.
EIT OLO 2 - Innovation skills and competencies	
The ability to formulate knowledge, ideas and technology to create new or significantly improved products, services, processes, policies, new business models or jobs, and to mobilise system innovation to contribute to broader societal change, while evaluating the unintended consequences of innovation and technology.	The ability to evaluate the research experiences combined with the knowledge, ideas and technology of others to create, test and implement new or significantly improved products, services, processes, policies, new business models or jobs, and to mobilise system innovation to contribute to broader societal change, while evaluating the unintended consequences of innovation and technology.
EIT OLO 3 - Creativity skills and competencies	
The ability to think beyond boundaries and systematically explore and generate new ideas.	The ability to extend boundaries and systematically explore and generate new ideas and to inspire and support others in this process and contribute to the further development of those ideas.
EIT OLO 4 – Intercultural skills and competencies	
The ability to engage and act internationally and to function effectively across cultures, sectors and/or organisations, to think and act appropriately and to communicate and work with people from different cultural and organisational backgrounds.	The ability to engage and act internationally and to function effectively – in research and other activities – across cultures, sectors and/or organisations, to think and act appropriately and to communicate and work with people from different cultural and organisational backgrounds.
EIT OLO 5 - Making value judgments and sustainability competencies	
The ability to identify short- and long-term future consequences of plans and decisions from an integrated scientific, ethical and intergenerational perspective and to merge this into a solution-focused approach, moving towards a sustainable and green society.	The ability to identify short- and long-term future consequences of plans and decisions from an integrated scientific, ethical and intergenerational perspective and to merge this into their professional activities, moving towards a sustainable and green society.
EIT OLO 6 - Leadership skills and competencies	
The ability of decision-making and leadership based on a holistic understanding of the contributions of Higher Education research and business to value creation, in limited sized teams and contexts.	The ability of decision-making and leadership based on a holistic understanding of the contributions of Higher Education, research and business to value creation.

¹² See <https://ec.europa.eu/jrc/en/publication/eur-scientific-and-technical-research-reports/entrecomp-action-get-inspired-make-it-happen-user-guide-european-entrepreneurship-competence>.

Learning outcomes at programme level - ILOs and ALOs

Learning outcomes are defined in terms of knowledge, skills and competencies. At programme level, the EIT recognises two types of learning outcomes: intended learning outcomes (ILO) and achieved learning outcomes (ALO). The 'Intended Learning Outcomes'(ILO) are written statements in educational documents of what a student is expected to know, understand and able to do on completion of a learning process. 'Achieved Learning Outcomes' (ALO) are what the students have attained during a study or learning process, shown in their responses to different educational activities and/or assessments within a degree programme.

Intended learning outcomes can apply to different levels, from the qualification frameworks as the Qualification Framework of European Higher Education Area (QF EHEA), the European Qualification Framework (EQF), or the National Qualification Frameworks (NQF)¹³ down to the level of programmes, modules and tasks. At the top level they are identified as Overarching Learning Outcomes (OLOs) to distinguish them from the specified intended learning outcomes at the module and task level. OLOs express competencies on a general level, whereas ILOs (the Intended Learning Outcomes) are specified to be used in a fit-for-purpose assessment task.

The Bologna system levels (QF-EHEA and NQF) and the EQF (for professional modules) form the basis for the EIT QALE model. In this model, the module-level intended learning outcomes are specified in relation to (and later evaluated against) the OLOs, in line with the Bologna system where all levels are integrated into a holistic system.

Defining intended learning outcomes

All ILOs in EIT education activities, as performed by the KICs, should:

- be clearly written in order to be easily understood by the potential learner;
- outline the expected results of the learning;
- have a clear student-centred educational process;
- emphasise competences, skills and impact in the learning content;
- describe skills and competencies and not only content knowledge. An example could include the following description: 'After the end of module... the student should be able to...'

Action verbs are used to describe how the ILOs are assessed at the module level. As an example, it is not possible to assess a learner's 'understanding', or their 'awareness of' or 'familiarity with' matters, whereas the ability to 'define', 'explain', 'calculate', 'differentiate', 'categorise', 'compare' can be clearly demonstrated in an assessment task.

In general, the objectives of a programme should in broad terms answer the question "what is the purpose/rationale of a programme?". The ILOs should specify the knowledge, skills and attitudes that an individual will be required to demonstrate in order to have completed the programme successfully. The relationship between objectives and the ILOs is close; the ILOs are derived from the objectives. Syllabuses

¹³ Qualification Framework of European Higher Education Area (EHEA). Available at [2015-10-22]: <http://www.ehea.info/article-details.aspx?ArticleId=67>

describe the content and the subject matter of a programme. In sum, the ILOs describe what students will be able to do with the content in order to fulfil the objectives¹⁴.

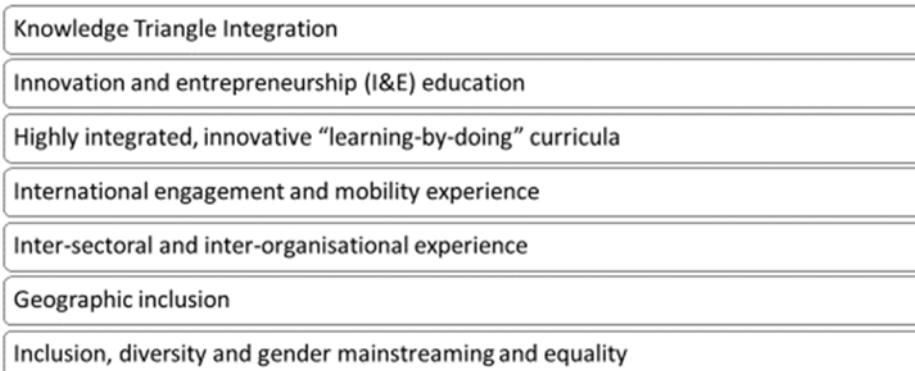
The key principles

All EIT-labelled degree programmes address the key principles in line with the EIT Label Framework. They set the expectations for the design, implementation and review of the degree programmes. For further elaboration, including the particular requirements, see the templates in Part 4: Guidance and templates for applicants.

Ethics and digitalisation are transversal elements that run through all the OLOs and the key principles of EIT-labelled degree programmes.

The following section presents how the key principles are manifested in the EIT-labelled degree programmes.

The key principles of the EIT Degree Programmes



Knowledge Triangle Integration

The Knowledge Triangle Integration (KTI) is a key principle of all EIT degree programmes where co-creation and collaboration between education, research and innovation, and business contribute to addressing societal challenges¹⁵. The focus on societal challenges through the integration of the Knowledge Triangle distinguishes the EIT from other EU innovation instruments. Since the inception of the EIT degree programmes, this principle has also applied to the development of the EIT’s internal quality assurance system for the educational activities provided by the KICs. Depending on the particular field and discipline, KICs are encouraged to involve civic society in the innovation processes and education programmes in different ways.

¹⁴ Adamson, L. (2011). On aims/objectives, learning outcomes and aligned teaching. Working material produced for SKVC - the National Lithuanian Quality Assurance Agency.

¹⁵ In line with the EIT Regulation (recast), see Article 3

Innovation & entrepreneurship (I&E) education

The EIT contributes to a highly-skilled European workforce, with an entrepreneurial mindset and capacity for innovation which reflects current societal needs. Hence, all EIT education and training activities emphasize the need for sustainable and inclusive forms of innovation, and teaches its students about business models that are regenerative and aim to create societal value which holistically takes into consideration environmental, economic and societal dimensions. In higher education, EIT programmes increase the I&E education capacity by empowering learners to transform their scientific expertise into tangible societal solutions.

Highly integrated, innovative learning-by-doing curriculum

All EIT-labelled degree programmes are grounded in contemporary insights from the scientific research on entrepreneurship education and characterised by learning by doing. This refers to a hands-on approach where learners benefit from evidence-based insights about innovation and entrepreneurial practices to interact with their environment in order to adapt and learn. This entails working both individually as well as in teams, with an interdisciplinary approach and typically focussing on authentic challenges articulated by KIC industry and business partners and/or other non-academic partners. Furthermore, students will be stimulated to work on their own (science-based) ventures during, and as part of, the programme.

International engagement and mobility experience

While innovation and entrepreneurship often take place locally, a distinctive feature of entrepreneurship fostered by the EIT is the international dimension in which local or regional ecosystems are connected through a network of institutional and personal relationships.

All EIT-labelled degree programmes shall feature a mandatory physical mobility. However, in justified cases the mobility can take virtual ¹⁶ (online) or blended form ¹⁷, including cross-border digitally enhanced activities and diverse 'internationalisation at home' actions. Additionally, the programmes will devote explicit attention to the existence and working of innovation systems at different scales, such as local, national, regional and international; as well as the positive and negative externalities of I&E.

Inter-sectoral and inter-organisational experience

All EIT-labelled degree programmes include inter-sectoral or organisational mobility in non-academic organisations, including business and industry, public sector, government, regulators and civil society. Best practices in inter-organisational experience are collaborative projects that involve intense interaction between the learner and the external organisation, including working in start-ups and social enterprises.

¹⁶ For Virtual Mobility, see <https://virtualmobility.eadtu.eu/formats>

¹⁷ Force majeure such as pandemic or individual reasons such as specific individual constraints related to health, disability, family.

Opportunities for virtual and blended learning and remote working to support mobility mitigation are promoted.

Geographic inclusion

In EIT-labelled degree programmes, geographic inclusion, the European dimension and international openness are embedded in the student recruitment, programme content and programme partner selection. The EIT-labelled degree programmes also increase their regional and local outreach in order to address disparities in innovation capacity and to promote knowledge and innovation diffusion across the Union. Special efforts are made to enhance the participation of learners, teachers and organisations from the countries eligible to take part in the EIT Regional Innovation Scheme. The use of blended learning and remote working are also encouraged to facilitate and enhance participation, inclusion and diffusion of innovation.

Inclusion, diversity and gender mainstreaming and equality

Inclusion, diversity, gender mainstreaming and equality are integrated into the design, implementation, monitoring and evaluation of the EIT-labelled degree programmes in line with EU policies on equality and non-discrimination as well as related EU strategies and policies in Education, Research and Innovation¹⁸. Recruitment and enrolment policies, alternative pathways and recognition of prior learning are promoted in view of improving social inclusion. Investments in student support, blended learning and remote working opportunities enable equal access and success in EIT education and training activities.

The EIT promotes a gender responsive portfolio of EIT-labelled programmes and balanced gender representation among education actors (learners, teachers, evaluators and decision makers) to address the current and anticipated skill shortages and demographic changes as well as the underutilisation of the skills and competencies of women.

The EIT quality indicators and quality requirements

The EIT QALE system is based on a set of four quality indicators (Qi1-Qi4), divided into different assessment fields, that – with minor adaptations – apply to both master's and doctoral programmes.

- Two indicators – Qi1 and Qi2 – are used for the labelling of new programmes.
- Two indicators – Qi3 and Qi4 – are focussed on results from and impact of the programme implementation and stakeholder experience. These indicators are used for follow-up evaluations but the exact choice of the indicators will depend on the scope and focus of evaluation, defined prior to the evaluation taking place.
- Follow-up evaluations may include all four or some of the indicators.
- The first quality indicator (Qi1) differs from the others in that it addresses a number of compulsory requirements on a yes/no basis whereas the quality indicators Qi2, Qi3 and Qi4 are all evaluated on a four-grade scale.

¹⁸ See also the EIT Gender Mainstreaming Policy: <https://eit.europa.eu/library/eit-gender-mainstreaming-policy>

Quality indicator 1 – Compulsory requirements

All assessment areas of Quality indicator 1 are compulsory components of EIT-labelled degrees. They are evaluated as yes/no, with room for additional comments. All assessment fields need to be fulfilled in order to proceed with the assessment of the programme.

Quality indicator 2 – Qualitative requirements

Quality indicator 2 evaluates whether the programme sufficiently covers the EIT OLOs in relation to the thematic field of the KIC as well as the key principles of the EIT Label model. Additional assessment fields evaluate whether the programme is characterised by activating teaching and learning methods (student-centred) and whether it provides students with access to rules, regulations and assessment criteria regarding assessment and grading. Qualitative requirements set the ambition; modest performance in some qualitative requirements can be compensated with excellent performance in others.

Quality indicator 3 – Results, achievements, and impacts

Quality indicator 3 consists of four assessment fields which evaluate:

1. Student's entrepreneurship skills and competencies. Examples of student entrepreneurship skills and competencies may include projects, products, or entrepreneurial test score. Guidance on curriculum design and benchmarking student entrepreneurship competencies is provided by the JRC's European Entrepreneurship Competencies Framework (EntreComp)¹⁹ as well as the Entrepreneurial Potential and Innovation Competences (EPIC) course assessment tool which can be used to measure students' skills and competence development.²⁰
2. Achieved Learning Outcomes (ALOs). These refer to samples of actual products by EIT students (e.g., master's theses, I&E theses, summer school deliverables, business development lab deliverables etc.)
3. Student retention and completion rates. Retention and completion rates should be closely monitored and analysed.
4. Graduate employment and career progress. This assessment field will stimulate the KICs to undertake analysis, evaluations and research on their educational activities in order to determine whether graduates show excellent labour market outcomes and career progress.

Quality indicator 4 – Stakeholder experiences and continuous improvement

Quality indicator 4 is divided into five assessment fields, covering feedback from, and experiences of, students, alumni, instructors, and non-academic partners (business/industry and other stakeholders); as well as the efforts to support the EIT Label community of practice and continuously improve the programme.

Data should be gathered by questionnaires or interviews (focused primarily on issues to do with Qi1 – Qi3).

¹⁹ <https://ec.europa.eu/jrc/en/publication/eur-scientific-and-technical-research-reports/entrecomp-action-get-inspired-make-it-happen-user-guide-european-entrepreneurship-competence>

²⁰ For more on EPIC, see <https://heinnovate.eu/en/heinnovate-resources>

Part 2: Concepts and definitions

This part introduces the main concepts of the EIT education and the EIT QALE model and may be used as a guidance in the design and evaluation of the EIT-labelled degree programmes.

Entrepreneurship and Entrepreneurship education

EIT defines entrepreneurship as a unique process that enables individuals with the entrepreneurial skills, mindset and know-how to turn ideas into action through a fusion of innovation, opportunity and resources. It relates to ways in which individuals in all kinds of organisations and sectors (private, public and third) create value and facilitate change for the benefit of themselves and others, with a particular emphasis on science and research-based forms of entrepreneurship.

Entrepreneurship education as understood by the EIT, is the development of entrepreneurial competencies and skills, with a focus on fostering ‘can-do’ attitudes and innovative behaviour within the scientific research field, which is fit for a variety of contexts and challenges in industry, the world of work and society. The aim is to enhance the entrepreneurial talent and innovation of the European Union to successfully impact upon global challenges and the drive for a sustainable society.

The EIT added value

Added value is defined by the EIT as maximising opportunities to connect the EIT OLOs, innovative concepts (ideas/intention) and practice (know-how/application/action); to support learners to ‘try-out’ entrepreneurship in a nurturing environment, enabling the application of I&E competences, skills and a ‘can-do’ attitude through experiential learning utilising authentic challenges and scenarios. This provides an insight into entrepreneurship in action and ‘adds value’ to the learners’ personal I&E journey.

The EIT/KIC added value in the context of EIT-labelled degree programmes education refers to all elements of a degree programme by which the programme fosters an integration of the Knowledge Triangle dimensions – education, research and innovation, and business – and equips learners with Innovation and entrepreneurship skills and competencies.

Quality in the context of the EIT educational agenda

In the EIT/KIC context, quality means that students achieve the Intended Learning Outcomes (ILO) of a programme through active learning methods and clear and helpful feedback in a rich and supportive learning environment.

Teaching for quality in the knowledge triangle

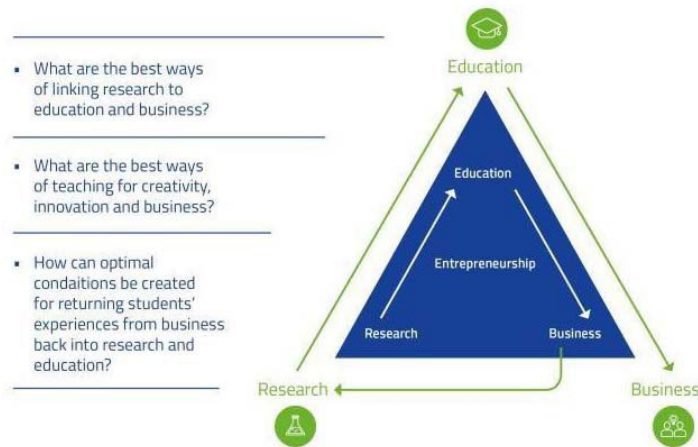


Fig. 3 Teaching for Quality in the Knowledge Triangle

Teaching and learning in the Knowledge Triangle

The Knowledge Triangle paradigm stands for improving the integration between education, research and innovation, and business. The EIT QALE model transforms this paradigm into a practical working model. The planning and labelling of the EIT degree programmes involve a simple enquiry-based process around the three nodes of the Knowledge Triangle²¹. The design and implementation of EIT education activities should reflect and respond to the following questions which constitute the basis for the EIT QALE model:

- What are the best ways of linking research to education and business /non-academic actors?
- What are the best ways of teaching for creativity, innovation and entrepreneurship, sustainability and internationalisation?
- How to create optimal conditions for returning student's experiences from business (or other non-academic actors) back into research and education?

Knowledge forms in the EIT education agenda

'Knowledge forms' provide a way of logically grouping OLOs together. The Bologna process promotes transferable or transversal skills, competencies, and attitudes, such as communication, making judgments and learning to learn. Ordering these into knowledge forms is a way to highlight also these types of learning outcomes. The explicit use of knowledge forms is the key to moving from content-based education to competence-based education²² which integrates skills, knowledge and attitudes.

²¹ Adamson, L. (2010, invited). Teaching for Quality in the Knowledge Triangle – how do we do it? European Institute of Innovation and Technology, EIT, Education Conference, 'The role of the EIT in the Education Landscape', Leuven - 2 & 3 December 2010.

²² Adamson, L & Flodström, A. (2013, in press). EU and Bologna - A New Educational Agenda for the Knowledge Society and its Global Students. In *The Global Student Experience: An International and Comparative Analysis*. Eds. Camille B. K., and Weyers, M. International Higher Education Series, Routledge Taylor Francis.

Using knowledge forms is also an effective way of profiling and branding educational programmes. In the EIT-labelled degree programmes, the chosen knowledge forms – EIT OLOs – relate to the Knowledge Triangle which distinguishes these programmes from others.

Fit-for-purpose assessment

The assessment must concern the ‘object’ under study, and the assessment method should always mirror the competencies that students are expected to be able to demonstrate. Assessment methods used by the KICs must provide students with opportunities to give evidence of their skills and competencies related to the EIT OLOs within the KIC thematic area.

In the EIT-labelled degree programmes, different assessment approaches are used: Content-based assessment refers to tasks that primarily concern facts about the object under study. Competence-based assessments refers to the assessment of intended learning outcomes that test the learner’s ability to use these facts. Impact-based assessments assess the ability of the learner to use these competencies in a real-life situation to create a change or solve a challenge.

The different modes of delivery and the focus on OLOs may call for alternative assessments compared to examinations or traditional academic writing. Alternative assessment methods should convince the learners (and other users of qualifications) that the qualifications have the same value and fitness for purpose as qualifications based on more traditional methods. Alternative assessment methods include asynchronous online assessments, which are less susceptible to variation in contexts and time zones, as well as essays and reports, time-limited open-book/take home examinations and pre-release of materials for students to work on prior to synchronous assessment.²³

Criterion-based assessments

In the criterion-based system, students achieve the ILOs of the programme or module and receive grading for this which provides a basis for a fair and reliable grading system for assessing learning outcomes.

The foundation for a criterion-based system is a *grading scale* based on numbers (1, 2, 3, etc.), letters (A, B, C, etc.) or labels (Pass, Pass with distinction, cum laude, etc.) and assessment criteria (grade descriptors)²⁴, which describe to what extent the student has achieved the learning outcomes for each level of the scale.

A continuous dialogue among instructors of the interpretations and use of these assessment criteria enhances the reliability of the assessments. For instance, training students in peer assessment and in applying assessment criteria to other students’ work improve their own learning.

²³ The Irish quality assurance agency QII has published guiding principles for alternative assessments which have been revised in view of the COVID-19 crisis.

²⁴ Standards and Guidelines for Quality Assurance in the European Higher Education Area (ESG) available at [2015-09-29]: http://www.enqa.eu/wp-content/uploads/2015/05/ESG_endorsed-with-changed-foreword.pdf

Active learning

Active learning is defined as any instructional method that engages students in the learning process. In active learning, students are required to do meaningful learning activities and think about what they are doing. The learning activities include both ‘doing’ and ‘thinking/reflecting about this doing’.

Research evidence supports the idea that active learning improves learning outcomes²⁵. However, active learning does not mean a total absence of lectures. Instructors can also activate students during a lecture, for instance, by asking them to compare their notes for a few minutes.

Aligned teaching

Aligned teaching or ‘constructive alignment’²⁶ implies a shift in the planning of the education programmes ‘from beginning to end’, in a reversed process²⁷. See Figure below.

Aligned teaching helps balance content-based education with competence-based education. It implies a transition from teacher-driven to student-centred learning: it changes the focus from teachers talking to students to teachers talking and interacting *with* the students.

Aligned teaching gives a clear logic and understanding of what students are expected to do and be able to achieve by the end of the study period subject to their own efforts. It shifts the focus in assessment from assessment *of* learning to assessment *for* learning and even assessment *to* learn.

²⁵ Hake, R. (1998) Interactive-engagement versus traditional methods: A six-thousand-student survey of mechanics test data for introductory physics courses. *Am. J. Phys.*, Vol. 66, No. 1, January

Prince, M. (2004). Does Active Learning Work? A Review of the Research. *Journal of Engineering Education*, 93(3), 223-231.

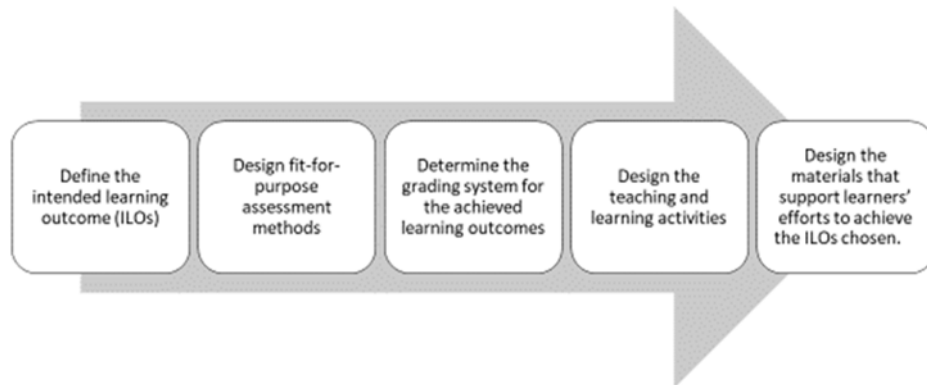
Smith, M. K., Wood, W. B., Adams, W. K., Wieman, C., Knight, J. K., Guild, N. & Su. T. T. (2009). Why Peer Discussion Improves Student Performance on In-Class Concept Questions. *Science*, Vol. 323 no. 5910 pp. 122-124.

Gibbs, G. (1982), Twenty Terrible Reasons for Lecturing, SCED Occasional Paper No. 8, p.27.

²⁶ Biggs, J. (1999): What the student Does: teaching for enhanced learning, *Higher Education Research & Development*, 18:1,57-75. See Available at [2018-03-26]: <https://doi.org/10.1080/0729436990180105>

²⁷ Adamson, L. (2011, invited). Quality Assurance and Student Centred Learning – Can QA be a tool that helps shifting the paradigm? Chinese University of Hong Kong, CUHK.

Aligned teaching



Joint curriculum development

Joint curriculum development refers to the collaboration between universities in different countries and within specific disciplines, which generates joint study programmes. There is a shared responsibility of the participating institutions to define the objectives of the programme, and to design of the curriculum, the organisation of the studies and the type of qualifications awarded. The objectives of a programme are jointly defined by partner institutions, with a view to giving graduates an added value when they enter the job market. This requires the identification of professional profiles that will be required, as well as a search for coherence between the objectives pursued and the curriculum developed.

The EIT takes one more step when it comes to joint curriculum development given the focus on the collaboration between academic and non-academic representatives.

Joint programmes, joint degrees, double or multiple degrees

The European Approach for Quality Assurance of Joint Programmes provides definitions for joint programmes, joint degrees and multiple degrees.

A 'joint programme' refers to 'an integrated curriculum coordinated and offered jointly by different higher education institutions from European Higher Education Area (EHEA) countries and leads to double/multiple degrees or a 'joint degree'. Joint programmes are a hallmark of the EHEA. They are set up to enhance the mobility of students and staff, to facilitate mutual learning and cooperation opportunities and to create programmes of excellence. They offer a genuine European learning experience to students.

A 'joint degree' is a single document awarded by higher education institutions offering the joint programme and nationally acknowledged as the recognised award of the 'joint programme'. A joint degree is an award, not the document (the diploma) providing evidence of having obtained the degree. It is possible to issue a joint degree, as evidenced by issuing separate documents (the diplomas).

A 'double degree' or 'multiple degree' are separate degrees awarded by higher education institutions offering the joint programme, attesting the successful completion of this programme (if two degrees are awarded by two institutions, this is a 'double degree'). They are recognised officially in the countries wherein the degree-awarding institutions are located.

The European Approach for Quality Assurance of Joint Programmes

The European Approach for Quality Assurance of Joint Programmes has been developed to enable lean and simple external quality assurance for joint programmes through a single accreditation procedure. It defines the need for QA standards that are based on the agreed tools of the European Higher Education Area, without the need to apply additional national criteria. The implementation of the European Approach is possible only if national legislation allows it.

Part 3: Processes and working tools

Labelling of new degree programmes

The labelling of new degree programmes follows four stages of the quality assurance processes.

1. Self-assessment of the programme by the applicant organisation in collaboration with the KIC.
2. External review by the expert review team.
3. Conclusion and recommendations by the review team.
4. Decision by the EIT on the initial award of the EIT Label.

The labelling process is a structured review, meaning that the self-assessment and the external review shall follow the guidance and templates provided in this Handbook.

The applicant organisations shall follow the portfolio principle: applications should provide evidence that is sufficient to convince the review team that the programme shall equip learners with the EIT OLOs, and that the other quality criteria are met.

The result and conclusions of the external review and the process of appeal

The external review team's conclusion on the application may take 3 different forms (for detail instructions see Part 5: Guidance and instructions for the external reviewers):

Option 1: The review team may recommend rejecting the application and to consider reapplication in cases where there is a need to make fundamental changes in the programme design and/or the application file and documentation provided fail to convince the review team about meeting the minimum criteria.

Option 2: Where the minimum requirements are met, but there are significant shortcomings that need to be addressed, review team may recommend provisional award of the EIT Label until specific improvement measures are taken prior to the award of the full EIT Label. In such cases, the review team might recommend a provisional Label up to 2 years to allow time to address the requirements.

Option 3: The review team recommends an award of the full EIT Label with no additional conditions.

Final decision is taken by the EIT Director, based on the conclusions and recommendations of the review team. The EIT Director decides on the initial award of the EIT Label for each of the submitted programmes. When the result of the assessment process leads to awarding the full Label (Option 3), the EIT Label is awarded for an unlimited period, and the consistency and quality of the programme will be monitored continually.

The process of appeal means that the applicant organisation(s), in collaboration with the KIC, may challenge the rejection and recommendation for reapplication (Option 1), by presenting the arguments for their

disagreement with the contested decision. Such appeal should be submitted in writing to the EIT Director within 3 months from the rejection decision. The decision will be made by the EIT Director after the consultation with the EIT Education Panel.

Additionally, applicant organisations who believe that there was a maladministration regarding the assessment of their application, may lodge a complaint to the European Ombudsman within two years of the date on which they became aware of the facts on which the complaint is based²⁸.

Finally, applicant organisations may bring an action for annulment under Article 263 of the Treaty on the Functioning of the European Union against the EIT within 2 months of receiving the rejection decision. The court responsible for hearing annulment procedures at first instance is the General Court of the European Union.

The EIT Labelling – step by step process

- The EIT Label application for a degree programme is produced by the applicant organisation (normally Higher Education Institution), or consortium of partners – together with the respective KIC education team. It is suggested to applicants to register the intention to submit a proposal and contact the KIC education team to receive further advice.
- The EIT Label application must include a self-assessment report of the programme, produced by the applicant organisation(s), in accordance with the requirements stipulated in this Handbook and in line with the provisions foreseen in the EIT Label Framework that sets the general guidelines.
- The application file should be structured according to the quality indicators (Qi1 and Qi2) and accompanied with relevant supporting evidence. The main working tool for both processes are the templates that must be used by the applicants. The templates include a list of the assessment fields which represent requirements for a programme to be awarded the Label.
- Annual application rounds are established by the EIT, and the applicants are expected to submit their applications by the deadlines announced by the EIT.
- The EIT Label application, including the accompanying documents, is submitted through the available online tool (EIT Cloud or other online form decided by the EIT).
- The EIT selects a panel of independent external experts to review the applications for the award of the EIT Label. KICs' representatives in the EIT Education Panel are informed about the selected experts in advance. The expert review team is briefed and instructed by the EIT. EIT makes sure that experts have access to the application files and all accompanied evidence as provided by the applicant(s).
- The evaluation of the application is conducted remotely. However, the EIT might – after consulting with the KICs who submitted the applications – suggest a specific face-to-face discussion (hearing) involving the representatives of the applicants, the KIC and the review team. In such case, the review team will submit specific question for the discussion in due time (ideally not later than one week before the meeting) as a basis for the discussion. They can be also held online.

²⁸ <http://www.ombudsman.europa.eu>

- The review team first confirms the compliance by answering “Yes” to all Template Qi1 criteria before proceeding to the review of new programmes using the Templates for Qi2.
- The review team submits their individual as well as consolidated evaluation programme reports to the EIT through the available online tool (EIT Cloud or other online), and the EIT forwards them to the respective KIC for information.
- After having considered the evaluation reports of the review teams, the EIT Director decides on the initial award of the EIT Label for each of the submitted programme.
- The EIT reports on the outcomes of the EIT labelling process to the KICs, informing any conditions underlying the granting of the EIT Label provisionally.
- In cases of awarding provisional Label (Option 2), requirements for specific improvement measures are forwarded to the relevant applicant(s). Applicant(s) shall submit the status report addressing the requirements at latest 3 months before the expiry of the duration of the provisional Label set in the awarding decision (up to 2 years). The EIT Officer in charge of the Label, having consulted the review team, reports on the progress in addressing the requirements to the EIT Director who consults with the EIT Education Panel and decides whether to award the full Label, or not.
- The EIT updates the information on the EIT’s website regarding the EIT Label awards on the basis of the outcome of the given evaluations.
- All students graduating/being admitted within the validity period of an EIT-labelled programme (irrespective of whether the period of study was commenced prior to/completed after the validity period) can be awarded an EIT Label certificate.

Regular monitoring and reporting on implementation of the programmes

The programmes awarded the EIT Label are subject to streamlined, regular monitoring and reporting, covering both quantitative and qualitative data.

Quantitative monitoring on student and graduate data shall be fully integrated in the central EIT data model which collects data from KICs’ activities in all segments. The regular monitoring of quantitative data will benefit from the standardisation of data flow within the EIT. The key data on students and graduates will be collected in line with the EIT Impact Framework and the Horizon Europe requirements.

In addition to the quantitative data, regular reporting will also include brief narrative reports based on qualitative data which will be delivered multi-annually, in line with the future EIT grant cycle model reporting frequency (standard grant reporting is planned after 18 and 36 months).

Qualitative part of the brief narrative reports will comprise of the following elements:

- A brief executive summary report (up to 2 pages) on the programme implementation against the project plan.
- Information on possible changes that have been made in the programme, their justification, accompanying documentation and also a description of how the changes affect particular assessment fields in the templates (if any).

- A brief summary (up to 3 pages) of feedback from students, alumni and stakeholders and a summary of whether, and how, this feedback has influenced the development of the programme.
- Any other relevant information that programmes would like to share; for instance, examples of good practice, exceptional student products, start-ups or other outcomes, achievements and impacts.

Longer-term monitoring and follow-up evaluation

As part of the continuous monitoring of the development of the EIT Label programmes, it is necessary that every programme will undergo a follow-up monitoring and evaluation after a sufficient number of student cohorts have graduated (at least three).

The follow-up monitoring and evaluation will not constitute a re-labelling of the programme but will simply ensure the 'health' of the programme and its compliance with the EIT Label. This ad-hoc evaluation will be integrated within EIT Monitoring Strategy.

The follow-up monitoring and evaluation will be initiated at the EIT's request and will be conducted in line with the EIT rules and provisions for monitoring.

The EIT will define the exact scope of the monitoring and evaluation event, in consultation with the EIT Education Panel, including a specification which aspect(s) of the programme design or performance will be covered.

The monitoring and evaluation may focus on:

- a single programme,
- an entire portfolio of a single KIC, or
- a horizontal topic/element/feature of programmes across KICs (for example, a topic identified during annual monitoring).

An ad hoc diagnostic follow-up evaluation may also be triggered by the results from the annual reporting, expert views, feedback from students, alumni and other stakeholders.

The EIT will inform the KIC about the scope, focus and objective of the upcoming monitoring and evaluation at least 12 months before the evaluation.

Depending on the scope and focus of the evaluation, the EIT will seek assistance of the independent external experts with relevant profile and background to conduct the evaluation.

The external review team's conclusion may take three different forms:

1. Confirmation of the good status and progress of the programme(s), without any further requirements.
2. Recommendation to keep the Label, but request for adjustments within a specific timeline.
3. Recommendation to revoke the Label in a duly justified case, if the quality of the programme does not comply with the requirements (Qi1 and Qi2) and/or its performance (following Qi3 and Qi4)

is unsatisfactory, and the programme has consistently failed to comply with the expert recommendations for improvement.

Final decision is taken by the EIT Director, who can confirm the experts' recommendations or – after consulting EIT Education Panel – to decide differently.

Applicant organisations have the right of appeal (see above the provision for appeal at the time of the initial application for EIT Label).

The independent external experts and their role

Independent external experts will be selected and contracted to perform the assessment in close cooperation with the EIT. They sign a Declaration of absence of conflict of interest as part of their expert contract.

The EIT will contract a maximum of three experts per each of the expert review team, from the following different profiles:

- One expert with a profile on Entrepreneurship and Education;
- One expert with a profile on Development of new curricula and Quality Assurance;
- One expert with a profile representing business and linking education with the Knowledge Triangle Integration (notably University-Business Cooperation)

It is recommended that the expert panel shall be complemented by one representative of the EIT Alumni community in the role of an observer (nominated by the EIT Alumni Board), who will not participate in the formal assessment of the applications, but can advise the experts and provide recommendations from perspective of students and graduates. The observer shall also sign a Declaration of absence of conflict of interest.

One of the experts will be nominated Rapporteur with the responsibility to collect comments and opinions of the experts, synthesize, prepare, summarise and submit the consolidated assessment report.

Each expert will participate in a briefing session with the EIT, and work remotely for the fulfilment of their tasks.

The KICs are responsible for responding to the experts' requests and needs for information in a timely manner.

Working tools

The labelling process is a *structured peer review*, which means that the self-assessment and the external review shall follow the guidance provided in this Handbook. The main working tools for the labelling and reviewing are the templates with guiding questions.

The self-assessment report and the templates

The development of the self-assessment report is guided by the templates available in this Handbook. These templates provide a list of self-evaluation questions for the new degree programme that the

applicants should respond to, as well as brief instructions what material should be provided as supporting evidence.

The self-assessment report is required to include the relevant documentation in order to provide evidence for the specific requirements. The questions in the templates will guide this selection, together with the examples provided in each template. As – in line with the portfolio principle mentioned above – the aim is to give the best possible evidence to reviewers, material may be both added and omitted from the list. Applicants may use official documents from the KIC and/or from KIC partner universities as well as any other relevant supporting documents from the KIC.

The external review and the templates (Qi1-Qi4)

The main working tool for the external review is this Handbook and the templates. Each template (Qi1-Qi4) addresses one quality indicator/requirement and consists of:

- A table for the evaluation on a four-grade scale for each assessment field, including grading criteria (apart from Qi1 which is pass/no-pass);
- brief instructions what material should be provided to reviewers;
- brief instructions to the reviewers; and
- review questions for each assessment field of the indicator.

The templates for the external review include *a final evaluation score template and the final conclusions and recommendation* from the review team. The conclusion should be based on a holistic view; no sharp cut-off values are provided. Where a provisional EIT Label is recommended, reviewers are requested to provide detailed recommendations to be completed in order to receive the full award.

The reviewers are expected to be well informed about how the EIT and its KICs use the key concepts as described in this Handbook. The EIT organises workshops in order to familiarise the expert reviewers sufficiently with the labelling and reviewing processes of the degree programmes. The external review should focus on the EIT added value and on what is asked for in the templates, nothing else.

Part 4: Guidance and templates for applicants

This part provides the general guidance for the submission of applications for the EIT Label for degree programmes and the templates for the labelling processes.

Guidance for compiling an application for the EIT Label

1. Each application consists of:
 - a. applicant details,
 - b. a factsheet for communication purposes,
 - c. contextual information,
 - d. a self-assessment report of the programme, prepared in line with the requirements stipulated in this Handbook,
 - e. a list of attachments for supporting evidence, and
 - f. the attachments which document fulfilment of particular requirements.
2. The applicant details, the factsheet for communication purposes and the contextual information will not be part of the formal assessment of the quality of the programme.
3. The applicant details comprise: (a) the title of the degree programme, and the level (master's, doctoral) (b) the name of the KIC, (c) administrative information i.e. identification of the submitting partner (leading HEI) and the names of the partner HEIs, and other partner organisations, each followed by the country code and a link to the website, and (c) contact details of the applicant.
4. The factsheet for communication purposes shall cover ²⁹ (a) Aims and objectives of the programme, (b) themes, priorities and market needs, (c) programme vision and philosophy pertaining to innovation and entrepreneurship (d) partners' roles and their capacity, and (c) structure and content.
5. The contextual information shall cover (a) the long-term vision of the programme, including its expected impacts; (b) the financial model leading to financial sustainability, and (c) a risk analysis and mitigation plan. See below for details.
6. The self-assessment report shall be structured according to the EIT requirements for the EIT Label. The main working tool to develop the self-assessment report are the templates (Qi1 and Qi2) which outline the EIT requirements. Applicants must address all requirements by providing a sufficient narrative answer as well as supporting documents as evidence. All compulsory requirements in template Qi1 must be met as a precondition for the evaluation of the additional requirements.

²⁹ The information in the factsheet will be posted on the EIT website for communication purposes.

7. The selection of the supporting evidence is based on the portfolio principle: the applicant should select the necessary documentation for the self-assessment report in order to give sufficient evidence for each requirement. This selection is guided by the questions in the templates, along with the non-exhaustive list of examples of possible supporting evidence, usually official documents from the KIC and/or from the KIC partner universities. In addition to text documents, the supporting documents may consist of different visuals such as figures, infographics, video materials, YouTube testimonials, photos etc. The supporting documents and evidence must be concise and limited – the idea is not to provide as much as possible, but to clearly and briefly document how the particular requirement is achieved.
8. Applications shall include a list of the attachments. Applicants shall clearly indicate where the relevant supporting information can be found in the annexes and rename each supporting document in a consistent way. Where appropriate, hyperlinks, infographics, video clips etc. can be used.

Guidance on ‘contextual information’

Applicants are required to provide a brief 3-to-5-page reflection on the context of the programme and its long-term vision. This reflection shall help to position the programme and provide information to better understand the long-term vision, intended impacts, the financial model behind the programme and the potential risks and mitigation strategies. The contextual information shall not be part of the formal assessment of the quality of the programme; however, the review team is invited to provide their brief informal recommendations how the programme can best make progress in the contextual aspects in a constructive and non-binding way.

The long-term vision of the programme including expected impacts

Applicants are requested to reflect on the long-term vision of the degree programme covering the market needs, target groups, and potential changes over time. This could take the form of a skills-needs analysis, which should cover - among other things - the horizontal elements of digitalisation and ethics. To enable programmes to decide the right emphasis for their audience and employment market, the programmes should demonstrate how they will cover demand for digital skills, on the one hand, and ethical considerations, on the other. They should also reflect on the expected impacts; for instance, in terms of societal challenges and the Sustainable Development Goals (SDGs), the future of the labour market, European higher education, the EIT Community context and other aspects that consider the impact of integrating the programme into the European/regional/local innovation system. In this section the applicants are expected to address the key performance indicators from the EIT Impact Framework³⁰.

The financial model of the programme

The EIT Label aims to contribute to the development of strong and sustainable education and training programmes. The applicants for the EIT Label are therefore requested to reflect on the financial model of the programme and provide their early ideas for financial sustainability strategies. These may take different forms across programmes, covering diverse co-funding arrangements and building on synergies and complementarities.

³⁰ See EIT GB Decision on the EIT Key Performance Indicators (Ares(2021)3113267 - 10/05/2021)

Risk analysis and mitigation plan

Transnational, collaborative education programmes are subject to diverse risks. For instance, some programmes are at greater risk of being affected by safety and security; others, there may be concerns over academic integrity. Programme risks must, therefore, be assessed individually. In order to make the EIT's education programmes financially sustainable, risk management and risk mitigation measures need to be embedded in the programme design. Special focus should be on the protection of learner needs. The applicants for the EIT Label are requested to identify the risks for the degree programme, their likelihood of occurring (low/medium/high) and the actions they plan to take to mitigate the risks.

Template for EIT Label – Introduction (the applicant details and the communication factsheet)

Frontpage

Please indicate the following:

(a) The title of the degree programme:

(b) The level (master's, doctoral)

(c) The name of the KIC:

The administrative information

(a) The submitting partner (leading HEI):

(b) The names of the partner HEIs, and other partner organisations, each followed by the country code and a link to the website:

(c) Contact details of the applicant:

The factsheet for communication purposes

(max. 100 words for each section in bullet points where possible):

(a) Aims and objectives of the programme:

(b) Themes, priorities and market needs:

(c) Programme vision and philosophy pertaining to innovation and entrepreneurship:

(d) Partners' roles and their capacity, and (c) structure and content:

Template for EIT Label – Contextual information

<i>Provide brief overview of max. 400-600 words for each section in bullet points where possible.</i>
The long-term vision of the programme
Expected impacts (including core EIT KPIs from the Impact Framework)
<p>The financial model of the programme</p> <p>In case the programme intends to request EIT funding contribution, please explain how the key EIT strategic principle of financial sustainability will be achieved. This requirement only applies to programmes applying for EIT funding.</p>
Risk analysis and mitigation plan

Template Qi1 for EIT Label – Compulsory requirements for degree programmes

This section outlines the compulsory Quality Indicators and requirements for the EIT-labelled degree programmes. All applications for the EIT Label must demonstrate full compliance with these requirements.

Each compulsory requirement is supported by questions. All requirements apply to both master's and doctoral degrees. However, in the case of Qi1.2 (Compliance with national and European quality standards and recognition requirements) dedicated questions have been developed for master's and doctoral degrees. The EIT-labelled doctoral programmes and their quality assurance draw on the Salzburg II Recommendations³¹ as well as the paper on 'Doctoral degrees beyond 2010: training talented researchers for society.'³²

How to use this template

Please respond to all questions by providing a positive/affirmative narrative response ('Yes, the programme ...') as well as additional evidence that best supports your application as it relates to the disciplinary field.

Minor contextual deviation from the requirement could be accepted – in such cases please fully explain and justify the case. However, the notion of the requirement must be satisfied.

The supporting documents may vary according to the programme and may consist of programme descriptions, project descriptions, websites, partner agreements etc. The list of examples should not be considered exhaustive; other evidence can be included in the EIT Label applications. The supporting documents and evidence must be concise and limited – the idea is not to provide as much as possible but only to clearly and briefly document how the particular requirement is achieved.

Compulsory requirements

Qi1.1 UNIVERSITY AND NON-ACADEMIC PARTNER COLLABORATION IN THE CURRICULUM: The degree programme features collaboration between universities and non-academic partners in the design and implementation of the curriculum.

- *Q1.1.1 Are at least 2 partner universities engaged in the implementation of the programme?*
- *Q1.1.2 Are the academic or non-academic partners at least from 2 different countries?*
- *Q1.1.3 Are at least 2 non-academic partners engaged in the development of the curriculum?*
- *Q1.1.4 Are at least 2 non-academic partners engaged in teaching activities?*
- *Q1.1.5 Do all students receive both academic and non-academic support on their mandatory thesis?*

Examples of supporting evidence:

- Letters of intent and support from all partners
- Description of each partner (brochure)
- Description of the role of the partners
- Consortium agreement signed by all partners

³¹ <https://www.eua.eu/resources/publications/615:salzburg-ii-%E2%80%93-recommendations.html>

³² See <https://www.leru.org/files/Doctoral-Degrees-beyond-2010-Training-Talented-Researchers-for-Society-Full-paper.pdf>

Qi1.2. COMPLIANCE WITH NATIONAL AND EUROPEAN QUALITY STANDARDS AND RECOGNITION REQUIREMENTS: The degree programme meets the national requirements and the European quality standards: EHEA³³ requirements for Master's level and Salzburg II Recommendation for Doctoral level³⁴ as well as Standards and Guidelines for Quality Assurance in the European Higher Education Area (ESGs)³⁵.

- *Q1.2.1a Is the master's programme aligned with the European guidelines on EHEA requirements and is the degree accredited or recognized in all the countries of the awarding universities?*
- *Q1.2.1b Is the doctoral programme aligned with European guidelines on Doctoral Degree and is the degree accredited or recognized in all the countries of the awarding universities?*
- *Q1.2.2 Will each graduate receive a Diploma Supplement (DS) for the degree?*

Examples of supporting evidence:

- Copy of diploma supplement
- National accreditation documents or other relevant documentation

Qi1.3 STUDENT SELECTION AND ADMISSION: The degree programme selection processes are jointly organised by the partner universities (and KIC) and they identify students' entrepreneurial potential.

- *Q1.3.1 Does the student selection process include criteria for the assessment of students' entrepreneurial potential?*
- *Q1.3.2 Do all the partner universities - and the KIC where relevant - implement jointly a shared process of application, selection and admission?*

Examples of supporting evidence:

- Information on selection procedures
- Information how the selection addresses students' entrepreneurial potential

Qi1.4 GRADUATE TRACKING: The degree programme has in place a graduate tracking system

- *Q1.4.1 Does the programme have a system in place to track graduates, or advanced plans to introduce it?*
- *Q1.4.2 Is there a KIC alumni organisation in place to track graduates or advanced plans to establish an alumni organisation?*

Examples of supporting evidence:

- Description of the graduate tracking system or related plans
- Description of KIC alumni organisation and its graduate tracking system or related plans

³³ <http://www.ehea.info/page-tools>

³⁴ <http://www.ehea.info/cid102053/doctoral-degree-salzburg-2005.html>

³⁵ https://enqa.eu/wp-content/uploads/2015/11/ESG_2015.pdf

Q1.5 EIT COMMUNITY BRAND AND EIT LABEL PROMOTION AND RECOGNITION: The degree programme promotes the EIT/KIC brand and the EIT Label.

- Q1.5.1 *Is the EIT Community Brand Book used as the basis for the programme promotion? Are the EU and the EIT emblems prominently displayed along with the EIT KIC logo?*
- Q1.5.2 *Is the EIT brand and the EIT Label consistently communicated through the programme delivery and collaborative work with partners?*
- Q1.5.3 *Will/Do the programme promotion and the websites of all partnering universities include information of the EIT Label?*
- Q1.5.4 *Will/Do all graduates receive either an EIT Label Certificate with the EIT logo or a degree certificate/Diploma Supplement with the EIT logo?*

Examples of supporting evidence:

- Example of marketing or promotional materials or plans that promote the EIT/KIC brand and EIT Label
- Copy of, or design for the EIT Label Certificate, degree certificate/diploma supplement with the EIT logo and the EU emblem

Q1.6 CROSS-ORGANISATIONAL AND INTERNATIONAL MOBILITY: The degree programme includes cross-organisational and international mobility.

- Q1.6.1 *Does the programme include a compulsory cross-organisational mobility, with the workload equivalent of at least 15 ECTS?*
- Q1.6.2 *Does the programme include a compulsory international mobility, with the workload equivalent of at least 15 ECTS?*
- Q1.6.3 *In case of a combined cross-organisational and international mobility, is the workload equivalent of at least 30 ECTS?*

Examples of supporting evidence:

- Description of cross-sectoral mobility opportunities
- Description of international mobility opportunities, including physical and virtual mobility³⁶
- Cross-sectoral mobility agreements and international mobility agreements
- Declaration confirming that all students shall undergo cross-organisational mobility
- Declaration confirming that all students shall undergo physical international mobility

Q1.7 LANGUAGE OF INSTRUCTION: The degree programme is taught in English.

- Q1.7.1 *Is the programme taught in English?*

Examples of supporting evidence:

- Declaration confirming that all students receive teaching in English

³⁶ See <https://virtualmobility.eadtu.eu/formats>; Virtual Mobility Handbook, 2006, available at <https://www.eurashe.eu/library/modernising-phe/mobility/virtual/WG4%20R%20Virtual%20Mobility%20Best%20Practice%20Manual.pdf>

Template Qi2 for EIT Label – Qualitative requirements for degree programmes

This section outlines the qualitative requirements for the EIT-labelled degree programmes in connection to the OLOs and key principles.

Quality requirements set the ambitions for the EIT degree programmes. Therefore, good performance on one quality requirement compensates for a more modest performance on another.

The EIT OLOs and the key principles are part of the requirements for labelling, and they need to be integrated into the programme design and implementation. The applicants are therefore requested to detail the programme's intended learning outcomes that relate to EIT OLOs and key principles in order to ensure that students can achieve these OLOs, and that the programme can meet the key principles.

The EIT labelling process shall not replace or duplicate national accreditation or quality assurance processes.

Most of the qualitative requirements apply to both master's and doctoral programmes. Exceptions are clearly indicated in the template. The key difference between the master's and doctoral programmes is that the doctoral programmes focus on the practice of research; as such, they are highly individual and therefore cannot be treated as a study programme in the same way as master's programmes can.

How to use this template

Please answer by using thematic information from the relevant specialisation, subject, programme or field. Start with the key words and concepts, by indicating how they relate to the degree programme to clarify meaning. As an example: *"In the context of this programme, this is what is meant by 'sustainable society'",* etc. Narrative answers must provide justification which may be based on the programme-specific approach to the terms and concepts, and subject areas concerned.

Please outline how the learning experience will ensure that the students achieve the EIT OLOs. For example, in relation to the requirement on OLO on entrepreneurial skills and competencies, make the intended learning outcomes contextual to the degree programme and illustrate how they simultaneously fulfil EIT OLOs; propose a narrative about the student experience.

- Include a table for the *Coverage of EIT Overarching Learning Outcomes* to ensure that all required OLOs are covered.

Please outline how the degree programme delivers on the key principles. For example, in relation to the Knowledge Triangle Integration (KTI): How do students perceive the KTI during the degree programme? Propose a narrative about the student experience.

- Include a table for the *Coverage of Key Principles* to ensure that all required principles are addressed.

Qualitative requirements:

Qi2.1 EIT OLO COVERAGE: The degree programme enables students to achieve all EIT Overarching Learning Outcomes. Innovative pedagogies including active teaching and learning methods are implemented to enable the achievement of intended learning outcomes.

- Q2.1.1 Does the programme ensure that students develop all the EIT OLOs?
- Q2.1.2 Are teaching and learning methods in the programme appropriate for achieving the intended learning outcomes which relate to the EIT OLOs?
- Q2.1.3 Are teaching and learning methods activating and appropriate irrespective of the mode of learning whether in-class, online or blended?
- Q2.1.4 What other innovative pedagogies are integrated into the programme design, particularly regarding the elements which relate to the EIT OLOs?

Examples of supporting evidence:

- OLO Coverage table
- Evidence and documents how the OLOs are achieved by the student through the course of the programme, examples from all involved universities, relevant module outlines
- Descriptions on teaching and learning methods, including alternatives to in-class teaching and learning methods, and how they are supporting student development related to the EIT OLOs
- A full description of the programme with the possible master's student study tracks clearly indicated / The Doctoral Work Plan template, as this relates to EIT OLOs
- A list of all compulsory courses that are included in the programme and relate to EIT OLOs and competences
- Description of modules/courses with ILOs highlighted including description of skills and competencies and mapping to EIT OLOs

Qi2.2 ASSESSMENT AND GRADING: The intended learning outcomes are transparent and assessable. The student assessment is fit for purpose irrespective of the mode of delivery and allows feedback from students. Appropriate grading is used.

- Q2.2.1 Are the programme's intended learning outcomes (which relate to EIT OLOs) transparent and assessable, and skills and competencies clearly described?
- Q2.2.2 Is the student assessment fit for purpose regarding the content and mode of learning, competencies and the EIT OLOs, allowing feedback from students? *Not applicable to Doctoral programmes*
- Q2.2.3 Are the rules and regulations for assessing and grading the programme in relation to EIT OLOs available to students before they begin the respective module? *Not applicable to Doctoral programmes*
- Q2.2.4 Are the assessment criteria (grade descriptors) used when assessing and grading student work in relation to the EIT OLOs?

Examples of supporting evidence:

- Example of tasks (academic or non-academic) that are used to assess (formative and summative assessment) the student's attainment
- National accreditation documents as appropriate (with English translation where relevant)
- Highlighted sections of appropriate official documents such as Exam and teaching regulations where they relate to assessment of EIT KIC thematic content
- Course descriptors/teaching units files including assessment methods connected to ILOs as these relate to EIT OLOs, covering also potential alternatives to standard in-class assessments
- Module/Course descriptors with assessment methods

- Information on the nature of the examinations, possibilities for re-sits, access to trial exams, post-exam inspection session
- Examples how assignments and examinations will be/are presented to students
- Samples of students' work (where available)
- Information on grading policy related to EIT OLOs given to students
- Document with the assessment criteria (grade descriptors) that are applied at each university when assessing students' attainment on modules in relation to EIT OLOs

Q12.3 KNOWLEDGE TRIANGLE INTEGRATION: The degree programme is based on bridging the academic and the non-academic world, and co-creation and collaboration which brings together universities and business and other non-academic partners whether public or third sector and civic society.

- *Q2.3.1 Are industrial and non-academic partners actively involved in the curriculum development?*
- *Q2.3.2 Are industrial and non-academic partners actively involved in teaching and learning activities?*

Examples of supporting evidence:

- Advisory Board records
 - Testimonies from industrial/non-academic partners including from local public authorities or third sector
 - List of educational activities provided by industrial/non-academic partners
 - Examples of educational materials developed for the programme with industrial/non-academic partners which are provided to students (e.g. case studies)
 - List of placements for internships
 - Document describing the different roles of industrial/non-academic partners including from public or third sector in teaching and learning activities including thesis supervision
 - List of guest lectures from industrial / non-academic partners given in courses
 - List of site visits and study tours to industrial / non-academic partners
 - Description of mentorships and student counselling involving industrial/non-academic partners
- *Q2.3.3 Do all students receive joint academic supervision and non-academic mentoring in their thesis work?*
 - *Q2.3.4 Does the programme actively promote student's non-academic professional networks?*

Examples of supporting evidence:

- Consortium agreement
- Description of the implementation of the thesis
- Description of KIC partnership activities regarding non-academic professional networking opportunities open to students on the programme
- Description of events/conferences open to students

- Q2.3.5 *Are Doctoral candidates offered leadership training focussed on Knowledge Triangle for value creation (in support of Doctoral programme EIT OLOs)?* *Not applicable to Master's programmes*

Examples of supporting evidence:

- The Doctoral Work Plan template with elements related to leadership training highlighted

Qi2.4 INNOVATION AND ENTREPRENEURSHIP EDUCATION AND INTERDISCIPLINARITY: The degree programme develops an entrepreneurial mindset and capacity for innovation.

- Q2.4.1 *Are students exposed/actively offered an access to the KIC's or university-based innovation and entrepreneurship ecosystem, including technical, financial and human services (incubators, mentoring and coaching, seed funding etc.) in order to develop their entrepreneurial skills and competencies and to test out the commercial potential and viability of their ideas/learning/research outcomes?*
- Q2.4.2 *Does the programme provide students with information and guidance on intellectual property rights (IPR) aligned with the respective (inter)disciplinary field?*
- Q2.4.3 *Does the programme have a continuous improvement plan in place to support instructors covering e.g. training, shared learning or continuous professional development in the area of I&E education?*
- Q2.4.4 *Does the programme adopt inter-/transdisciplinary approaches and bring together science/technology/knowledge in order to address broad societal and global challenges and/or link up with new business and innovation processes?*

Examples of supporting evidence:

- Description of incubators, entrepreneurship labs, summer school, seminar, or any other facility or mechanism designed to support entrepreneurial students, including both curricular and extra-curricular opportunities
- Description of the integration of IPR awareness in the programme
- Description of opportunities for instructors to gain and update their pedagogical skills in innovation and entrepreneurship
- Profiles of the key innovation and entrepreneurship staff (I&E specialists or thematic specialist with the additional task to support I&E)
- Information about the different roles of non-academic supervisors and how that compares to the role of academic supervisors; information of the weight that is given to the non-academic supervisors' evaluation when it comes to the (final) grades.
- Brief description of the organisation of the support for non-specialist staff in teaching I&E
- Letter of endorsement from industrial and non-academic partners

Qi2.5 HIGHLY INTEGRATED, INNOVATIVE "LEARNING-BY-DOING" CURRICULA: The programme utilises hands-on approached where learners interact with their environment in order to adapt and learn.

- Q2.5.1 *Does the programme provide students with opportunities for learning by doing, exposure to the reality of professional life outside university and the future labour market needs?*

Examples of supporting evidence:

- List of site visits and study tours to industrial partners and companies or non-academic partners
- Real-life industrial/non-academic challenges integrated into the curriculum
- Testimonies from recruiters (industrial/non-academic partners)
- Programme objectives, philosophy of the programme
- Non-academic internships
- Documents detailing the internship length and requirements

Qi2.6 INTERNATIONAL ENGAGEMENT AND MOBILITY EXPERIENCE: Mandatory physical mobility³⁷ supports the achievements of OLOs and complemented with cross-border virtual or blended mobility where needed.

- *Q2.6.1 Is the international physical mobility organized so that it enables the achievement of the intended learning outcomes? Alternatively, in situations where physical mobility is not possible, is the programme organised so that it can offer international experience through virtual, blended and hybrid mobility that enables the achievement of the intended learning outcomes?*

Examples of supporting evidence:

- Student tracks/The Doctoral Work Plan template
- Objectives of the modules
- Documents such as the consortium agreement
- Mobility agreements
- Course descriptions
- Cross-border digitally enhanced co-curricular activities and diverse ‘internationalisation at home’ actions
- Description of the organisation of the support for faculty/staff in the facilitation of the mobility

Qi2.7 INTER-SECTORAL EXPERIENCE AND CROSS-ORGANISATIONAL MOBILITY: The programme include inter-sectoral or organisational mobility in non-academic organisations, (business and industry, public sector, government, regulators, third sector, start-ups).

- *Q2.7.1 Is the cross-organisational mobility organized so that it enables the achievement of the intended learning outcomes in relation to the EIT OLOs?*
- *Q2.7.2 Does the programme offer support for the university staff in the facilitation of cross-organisational mobility?*
- *Q2.7.3 Are Doctoral Candidates performing an internship outside the university, equivalent of 30 ECTS (please take note that 15 ECTS is compulsory)? ***not applicable for Master’s programmes***

Examples of supporting evidence:

- Master’s student tracks/The Doctoral Work Plan template
- Mobility agreements
- Objectives of associated modules
- Documents such as the consortium agreement

³⁷ Physical mobility can be replaced by other means of mobility under exceptional, well justified cases.

- Brief description of the organisation of the support for faculty/staff (including non-specialist staff) in the facilitation of the mobility

Q12.8 GEOGRAPHIC INCLUSION: Geographic inclusion, the European dimension and openness to the world are embedded in the student recruitment, programme content and programme partner selection. Special efforts are made to enhance the participation from the countries eligible to take part in the EIT Regional Innovation Scheme (RIS).

- *Q2.8.1 Are appropriate plans in place to ensure a balanced recruitment of European vs. non-European students, including targets and monitoring mechanisms?*
- *Q2.8.2 Are appropriate plans in place to enhance recruitment of students from the EIT RIS-eligible countries, including appropriate monitoring mechanisms?*
- *Q2.8.3 Is at least 1 of the partner universities and at least 1 of the non-academic partners from the EIT RIS eligible countries or are there advanced plans to encourage institutions from EIT RIS-eligible countries to participate in the programmes?*
- *Q2.8.4 Are plans in place to enhance participation of instructors from the EIT RIS-eligible countries?*

Examples of supporting evidence:

- Description of marketing and recruitment plans for European and non-European students as well as from the EIT RIS-eligible countries
- Report on recruitment data at host institution and historical performance of related programmes, with comparison against proposed programme application
- Description of plans to enhance participation of instructors from EIT RIS-eligible countries
- List of the partner universities from EIT RIS eligible countries or the plan to integrate RIS country universities in the programme

Q12.9 INCLUSION, DIVERSITY AND GENDER MAINSTREAMING: Recruitment and enrolment policies, alternative pathways and recognition of prior learning are promoted to improve social inclusion and diversity. Investments in the student support enable equal access and success. Balanced gender representation among learners and instructors is promoted.

- *Q2.9.1 Are appropriate strategies and policies in place to enhance inclusion, diversity and non-discrimination, including targets and monitoring mechanisms?*
- *Q2.9.2 Are appropriate strategies and policies in place to enhance gender equality and mainstreaming in line with the EIT policies, including targets and monitoring mechanisms?*

Examples of supporting evidence:

- Description of marketing and recruitment plans and policies for inclusion including financial, social and academic support
- Description of marketing and recruitment plans and policies for gender inclusion
- Strategies, policies and actions plans for gender equality and mainstreaming in institutional staff and student policies
- Data on inclusion, diversity and non-discrimination and gender equality

Guidance for monitoring and evaluation of EIT Label throughout the validity of the Label

This part provides general guidance for monitoring of the degree programmes after the EIT Label has been awarded for an unlimited period. It covers two different processes:

- Regular monitoring and reporting on implementation of the EIT-labelled programmes
- Longer-term monitoring and follow-up evaluation of the EIT-labelled degree programmes after sufficient number of cohorts have graduated - normally, three cohorts.

Regular monitoring and reporting on implementation of the EIT-labelled degree programmes

This section outlines the requirements for regular monitoring and reporting on the implementation of the EIT-labelled degree programmes.

The EIT-labelled degree programmes are subject to streamlined, regular monitoring and reporting on the implementation.

The regular monitoring and reporting will cover the progress, performance and health of the programme as well as supporting data sourced from the EIT central data system. Both quantitative and qualitative data will be collected and used for continuous improvement of the programmes.

The results and indications from the regular monitoring and reporting will feed into long-term follow-up evaluation and may trigger an ad hoc diagnostic evaluation.

Regular reporting by programme coordinators

The regular reporting on the programme implementation by programme coordinators will be aligned with the EIT Grant Cycle, respecting the academic year³⁸. Brief narrative reports consisting qualitative data will be delivered multi-annually, in line with the future Business Plan frequency (after 18 and 36 months).

Regular reporting by programme coordinators will comprise of the following four elements:

- A brief executive summary (up to 2 pages) on the programme implementation against the project plan (progress, performance and milestones, reflection on delivery formats, participating institutions, key principles, modules, lecture teams, syllabuses, curricula etc.)
- Information on possible changes that have been made in the programme, their justification, accompanying documentation and also description of how the changes affect particular assessment fields in the templates (if any).
- A brief summary (up to 3 pages) of available feedback from students, alumni and stakeholders, including whether, and how, this feedback has influenced the development of the programme.

³⁸ The annual frequency of the monitoring may be changed if the EIT moves to the multiannual approach

- Any other relevant information that programmes would like to share; for instance, examples of good practice, examples of student products, start-ups or other outcomes, achievements and impacts.

Monitoring through the central EIT data model

The monitoring of quantitative data will benefit from the standardisation of data flow within the EIT. Quantitative data on students and graduates shall be retrieved from the central EIT data model which collects data from KICs' activities in all segments. Annual cut-off dates are set by the EIT.

The monitoring on students and graduates will cover the following key data in line with the EIT Impact Framework³⁹ and the Horizon Europe requirements

- Student data: number of applicants, number of enrolled students, number of active students, gender balance, geographical background (EU/EHEA, EIT RIS countries, Third countries),
- Graduate data: number of graduates, gender, geographical background (EU/EHEA, EIT RIS countries, Third countries), graduate destinations and labour market situation,

³⁹ See EIT GB Decision on the EIT Key Performance Indicators Ares(2021)3113267 - 10/05/2021

Longer-term monitoring and follow-up evaluation of EIT-labelled degree programmes

This section outlines the requirements for the ad hoc longer-term monitoring and evaluation of the EIT-labelled degree programmes.

The EIT-labelled degree programmes will undergo a longer-term monitoring and evaluation after at least three graduate cohorts has been produced. This does not constitute a relabelling of the programme but will simply ensure the 'health' of the programme and its compliance with the EIT Label.

The evaluation is not automatic; rather, it is initiated by the EIT, based on specific triggering events, such as findings and results from the regular continuous monitoring (see above), past recommendations of the independent experts, feedback from students, alumni and stakeholders or following request of the EIT Governing Board.

The EIT will define the exact scope of the monitoring and evaluation event, in consultation with the relevant KIC or the EIT Education Panel (if more than one KIC shall be affected), including a specification which aspect(s) of the programme design or performance will be covered. This ad-hoc evaluation will be integrated within EIT Monitoring Strategy and will be conducted in line with the EIT rules and provisions for monitoring.

The EIT will inform the KIC about the scope, focus and objective of the upcoming monitoring and evaluation ideally at least 12 months before the evaluation.

The monitoring and evaluation may focus on:

- a single programme,
- an entire portfolio of a single KIC, or
- a horizontal topic/element/feature of programmes across KICs (e.g. a topic identified in regular monitoring).

Depending on the focus and scope of the evaluation event, the programme must evidence how it fulfils quality indicators Qi1, Qi2, Qi3 and Qi4 as relevant. The evaluation may therefore focus on requirements for programme design, but also on results and achievements aligned with the EIT Impact Framework.

In this section you will find the templates for reporting on and monitoring of the results, achievements, and impact of EIT Label degree programmes (Qi3) as well as for reporting on the stakeholder experience and continuous improvement (Qi4).

These templates are offered as baseline for the review, however EIT will provide KICs and programmes with concrete requirements and instructions for preparation prior the particular monitoring event in advance.

Template Qi3 for the results, achievements, and impact of EIT Label degree programmes

Qi3.1 STUDENTS' ENTREPRENEURSHIP COMPETENCIES: The degree programme fosters entrepreneurship skills and competencies.

- *Q3.1.1 Does the programme foster entrepreneurship skills and competencies?*

Examples of supporting evidence:

- Examples of completed student projects and/or products and start-ups
- Benchmarking against entrepreneurship competencies (EntreComp, European Entrepreneurship Competencies Framework, EPIC etc.)

Qi3.2 STUDENT ACHIEVEMENT OF EIT OLOs: Students achieve all EIT OLOs.

- *Q3.2.1 Does the sample from the programme self-assessment demonstrate that the students have achieved all the EIT OLOs?*
- *Q3.2.2 Are the students' results of programme assessments (such as reports, thesis, etc.) stored for EIT review purposes in line with the GDPR requirements?*

Examples of supporting evidence:

- Description of the process for storage of learner feedback and the results from programme assessments (e.g. old student work) in line with GDPR requirements
- A selection of student work e.g. master's theses, I&E theses, summer school deliverables, business development lab deliverables etc. The selection should:
 - Randomly cover 30% of the students per student cohort, for instance 10 students from a cohort of 30 students, whose products may come from any semester.
 - Give examples of what is considered lowest, medium and highest quality.

Qi3.3 STUDENT RETENTION AND COMPLETION: The degree programme has high retention/completion rates.

- *Q3.3.1 Does the programme have high student retention and completion rates (the share of admitted students completing the full programme)?*
- *Q3.3.2 Does the programme provide a robust tracking and analysis of retention and completion?*

Examples of supporting evidence:

- Data on student retention and completion rates
- Analysis of the retention and completion rates

Qi3.4 GRADUATE EMPLOYMENT AND CAREER PROGRESS: Graduates show excellent labour market outcomes and career progress.

- *Q3.4.1 Does the programme show evidence of high graduate employment rates?*

- *Q3.4.2 Does the programme provide robust graduate tracking with fine grained data and analysis of graduate outcomes (employment, labour market match, sector, entrepreneurship) and career progress over time?*

Examples of supporting evidence:

- Data in line with the EIT Impact Framework
- Graduate tracking data
- Employment outcomes, match with EIT Label education, career progress over time
- Graduate destination surveys and their results over time
- Analysis of the graduate tracking data

Template Q4 for the stakeholder experience and continuous improvement of the EIT Label

Q4.1 STUDENT FEEDBACK AND EXPERIENCES: Systematic student feedback is collected and used to improve the programme.

- *Q4.1.1 Are students and doctoral candidates given the opportunity to express their views of the programme?*
- *Q4.1.2 Are questions included that are directly focused on the EIT profile; EIT OLOs, learning-by-doing, connections with non-academic contexts?*
- *Q4.1.3 Are the results presented of these surveys, focus groups etc. satisfactory in giving a clear overview of the areas of strength and/or need for improvement of the programme?*

Examples of supporting evidence:

- Description of the methods – surveys, focus groups etc. – for gathering feedback and experiences from students
- The latest results of these inquiries regarding the EIT OLOs, key principles such as learning-by-doing, and connections with the non-academic contexts
- Examples how student feedback has been / is used to improve the programme

Q4.2 ALUMNI FEEDBACK AND EXPERIENCES: Systematic alumni feedback is collected and used to improve the programme.

- *Q4.2.1 Are alumni given the opportunity to express their views of the programme on a regular basis through a formal appraisal process?*
- *Q4.2.2 Are questions included about career changes (career progress, job changes, start-up and innovation project involvement etc.) related to completing the programme?*
- *Q4.2.3 Are the results of the formal appraisal process satisfactory in giving a clear overview of the areas of strength and areas in need of improvement?*

Examples of supporting evidence:

- Description of the methods (surveys, focus groups etc.) you use for gathering experiences and opinions from alumni
- Description of the alumni and their careers as tracked in the university/alumni tracking system.
- The latest results of the relevant inquiries about career changes related to graduating from the programme
- Description of the process for storage of alumni feedback in line with GDPR requirements
- Examples how alumni feedback has been / is used to improve the programme

Qi4.3 INSTRUCTOR FEEDBACK AND EXPERIENCES: Systematic feedback from instructors is collected and used to improve the programme.

- *Q4.3.1 Are instructors (who are delivering the education in the EIT-Label programmes) given the opportunity to express their views of the programme?*
- *Q4.3.2 Are questions included that are directly focused on the EIT profile; EIT OLOs, learning-by-doing, connections with non-academic contexts?*
- *Q4.3.3 Are the results presented of these surveys, focus groups etc. satisfactory in giving a clear overview of the areas of strength and/or need for improvement of the programme?*

Examples of supporting evidence:

- Description of the methods – surveys, focus groups etc. – for gathering feedback and experiences from instructors
- The latest results of these inquiries regarding the EIT OLOs, key principles such as learning-by-doing, and connections with the non-academic contexts
- Description of the process for storage of instructors' feedback in line with GDPR requirements
- Examples how student feedback has been / is used to improve the programme

Qi4.4 EXTERNAL STAKEHOLDERS' FEEDBACK AND EXPERIENCES: Systematic feedback from business and not-academic partners is collected and used to improve the programme.

- *Q4.4.1 Are partners and other external stakeholders given the opportunity to express their views of the programme on a regular basis through a formal appraisal process?*
- *Q4.4.2 Is feedback collected directly focused on the EIT profile; EIT OLOs, learning-by-doing, connections with non-academic contexts?*
- *Q4.4.3 Is feedback collected (from industry) whether the programme fills skills gaps and/or skills shortages?*
- *Q4.4.4 Are the results of these surveys, focus groups, etc., satisfactory in giving a clear overview of the areas of strength and areas in need of improvement of the programme?*

Examples of supporting evidence:

- Information on the methods (surveys, focus groups, etc.) for gathering experiences and opinions from external stakeholders (e.g. non-academic partners, industry / business partners, employers, innovation and entrepreneurship support actors, policy makers etc.)
- The latest results of the relevant inquiries
- Description of the process for storage of feedback from external stakeholders in line with GDPR requirements
- Examples how the feedback from external stakeholders has been / is used to improve the programme

Q4.5 SUPPORT TO EIT LABEL COMMUNITY OF PRACTICE: Systematic efforts are made to support the EI Label community of practice.

- 4.5.1 *Have there been any research studies, evaluations, analyses and/or development activities to improve the programme?*
- 4.5.2 *If you answered yes on 4.5.1, have these activities generated new evidence and knowledge on what works and where there is room for improvement and what changes, measures and actions are needed to improve the programme?*
- 4.5.3 *If you answered yes on 4.5.1, have these activities led to evidence-based decisions on how to develop the programme?*
- 4.5.4 *Have there been continuing professional development activities for the instructors notably in teaching of entrepreneurship and innovation?*

Examples of supporting evidence:

- Description of outcomes of evaluations of the programme, including programme evaluation reports, new pedagogic tools developed etc.
- Research studies and analyses in the form of published articles, reports, conference presentations etc. of educational R&D projects
- Training and development delivered or planned for the programme stakeholders based on research and development activity within the programme
- Evidence of the development of communities of practice for teaching and learning; documented pedagogical cooperation methodology, processes and/or tools; documented continuous improvement processes

Part 5: Guidance and instructions for the external reviewers

This part provides the guidance for the external review team experts who are selected by the EIT and invited to take part in the evaluation of the applications for the EIT Label or to assist the EIT in the monitoring and evaluating of the existing EIT-labelled degree programmes. The external independent experts are invited to familiarise themselves with the following instructions, as well as with the instructions for the applicants in Part 5.

Review of initial award of the EIT Label

External experts support the labelling of new degree programmes by:

- verifying the self-assessment reports,
- identifying “good practices” within the submitted applications and in the programme design, and
- providing feedback on relevant aspects of EIT Label Model and assessment process from expert perspective.

The review for the initial award of the EIT Label covers:

- the contextual Information for the EIT Label for degree programmes – Introduction sections of the application,
- the compulsory requirements for awarding the EIT Label to degree programmes – Template Qi1, and
- the qualitative requirements for the EIT Label – Template Qi2.

Review of the Contextual Information for the initial award of the EIT Label

The experts shall review the contextual information of the programme, by providing their brief informal recommendations how the programme can best make progress in the contextual aspects outlined in this Handbook. The reflections should be brief, max 300-500 words for each aspect (Long-term vision, Expected impacts, Financial model, and Risk analysis and mitigation), and reported in a dedicated template.

Please note:

The reflection on the contextual information is not part of the formal assessment of the quality of the programme. No grading is required for this task. Expert’s views on contextual information will feed into long-term monitoring of the programmes in a non-committing way.

In case the review team does not agree on a specific recommendation, the chair of the review team shall make the final decision. In this case the arguments for the disagreement should be specified.

Template for the expert team informal recommendations for the contextual aspects of the degree

programme

<p>Informal recommendations how the programme can best make progress in contextual aspects</p> <p><i>Brief recommendations of 300-500 words for each section in bullet points where possible.</i></p>
The long-term vision of the programme
Expected impacts
The financial model of the programme
Risk analysis and mitigation plan

Review of the compulsory requirements for the initial award of the EIT Label - Template Qi1

The experts shall confirm the full compliance of all compulsory requirements before they can proceed to the quality review of the programme (Template Qi1).

However, if in some requirements the application can convincingly document only at least partial compliance, the expert panel could exceptionally consider awarding the EIT Label provisionally and require adjustment and changes to be made in a given time to ensure full compliance.

Please note:

The criteria shall be assessed on a yes/no scale. Additional information can be requested from applicants for clarification. No written comments from the review team are required per assessment field as these are basic compliance requirements, rather than a quality assessment. But experts can still provide suggestions and reflections towards compulsory requirements in the final general feedback section of their report.

Results of the assessment

- If the programme receives a 'Go' decision, the review team may progress to the full quality review.
- If the programme receives a 'No Go' decision, the review team should write a short report (maximum 500 words) to make recommendations for reapplication or improvement prior to the award of the EIT Label. In this case, the programme review is halted, the EIT is informed.
- The recommendations for reapplication or improvement are forwarded to the relevant KIC which then informs the applicant.

Review of the Qualitative requirements for the EIT Label - Template Qi2

The experts shall assess the applicants' submission for the qualitative requirements, using a specified grading scale and a template. Applications for the EIT Label (new programmes) should evidence to what extent they fulfil the quality indicator assessment fields.

Each expert should base their grading on the evaluation on the programme as a whole although different HEIs within the same programme may show different quality on the same requirement.

For further guidance, see the 'EIT Overarching Learning Outcomes (OLOs)' and 'Key principles' in addition to the explanations of terms and concepts in this document.

Please note:

The EIT labelling process does not replace or duplicate national accreditation / quality assurance processes but aims to ensure that the students will achieve the learning outcomes and that the programmes meet the other quality requirements. The review focus is primarily on the added value proposed through (new applications) or provided by (new applications) the EIT Label.

Grading scale: determining Quality Indicator Scores

Qualitative requirements will be assessed using the grading scale from 1 to 4. The review team members should grade each assessment field/question in line with the table 2.

Each quality indicator score should build on the consensus of the external review team. An average score of indicators may be used to inform the decision; however, the scoring of indicators and the overall application should be based on the portfolio application submission and verbal evidence presented by the applicants during the interviews. This consensus decision should be explained in the review report with justifications based on the evidence provided.

Scoring per particular assessment question shall be accompanied with brief narrative explanation, using concrete references to information provided in the application. The lower the evaluation score, the more thorough and elaborated explanation is expected, to provide the applicants with as detailed feedback as possible in order to learn from the assessment and to address the shortcomings accordingly. In case the review team does not agree on a specific recommendation, the chair of the review team shall make the final decision. In this case the arguments for the disagreement should be specified.

Table 2. Grading scale for assessing particular assessment fields in Qi2

Grade	Evaluation	Criteria
1	Does not meet the minimum criteria	The main part of criteria has not been met
2	Meets the minimum criteria but improvements are needed	The criteria has been partially met.
3	Good	The criteria has been met
4	Excellent	The criteria has been met and includes evidence of best practice in design and/or implementation

Final conclusions and Recommendations Template for Reviewers

This section provides guidance for the review team to design their final conclusions and recommendations regarding the application for the initial award of the EIT Label.

Determining the Final Evaluation Score

The final evaluation score and proposal to award the EIT label should build on the consensus of the external review team. An average score of indicators may be used to inform the decision; however, the scoring of indicators and the overall application should be based on the portfolio application submission and verbal evidence presented by the applicants during interviews. This consensus decision should be explained in the report with justifications based upon the different forms of evidence provided.

In the narrative feedback, and conclusions concrete references to information provided in the application should be made. The lower the final evaluation score, the more thorough and elaborated explanation is expected, to provide the applicants with as detailed feedback as possible in order to learn from the assessment and to address the shortcomings accordingly.

Should the review team not agree on a specific recommendation, the chair of the review team makes the final decision. This situation should be stated clearly and the arguments for the disagreement should be specified.

Table 3: Grading scale for Final evaluation score

Grade	Evaluation	Criteria
1	Does not meet the minimum criteria	Mainly scores of 1 and no evidence that the application meets the requirements for the EIT Label
2	Meets the minimum criteria but still needs improvement	Mainly scores of 2 and limited evidence that the application meets the requirements for the EIT Label
3	Good	Mainly scores of 3 and evidence that the application meets the requirements for the EIT Label
4	Excellent	Mainly scores of 4 and evidence of best practice in design for the EIT Label

When shall be the Label recommended?

Where the programme has received a final evaluation score of 3 or 4, the review team recommends that EIT Label is awarded. After positive assessment, the EIT Label is awarded for unlimited period and consistency and quality of the programme will be monitored continually.

If the programme meets the minimum criteria only (a final evaluation score of 2), the review team needs to propose concrete recommendations for improvement. A provisional award may be recommended for a period of between 1 to 2 years, based on the time needed to implement the required improvements in a satisfactory way.

If the review team does not recommend the EIT Label (a final evaluation score of 1), it should provide clear reasons for this in the final report so that applicants can learn from the process if they should wish to consider making a new application in future years.

Template for the expert team - Final Conclusions and recommendations (Initial award of the EIT Label)

Programme name:	
Level of the programme (Master's / Doctoral):	
KIC:	
Final Evaluation Score (1-4):	
Final Conclusion – is Label recommended? (Yes/No/Provisionally)	

<p>Provisional Award of EIT Label - Requirements</p> <p>Where a provisional award is recommended, the following requirements must be addressed before a full award can be recommended.</p> <p><i>Comments should not exceed 1000 words and should use bullet points where possible. Statements should be qualified with examples and reference to the particular assessment questions/answers and information as provided in the application file.</i></p>
<p>The list of requirements:</p>
<p>Recommended probationary period (1-2 years):</p>

<p>Review Team Overall Comments</p> <p><i>Comments should not exceed 2000 words and should use bullet points where possible. Statements should be qualified with examples.</i></p>

Date
Name of Chair of review team:
Name of review team members:

Review for the longer-term follow-up evaluation of the EIT-labelled degree programmes

This section provides the review team with guidance to design their final conclusions and recommendations regarding the long-term follow-up evaluation of the EIT Label.

As part of the continuous monitoring of the development of the programmes, it is necessary that every programme will undergo a follow-up evaluation after sufficient number of graduate cohorts have been produced.

The EIT will define the scope and focus of the monitoring event. Depending on the scope and focus, the EIT will seek assistance of independent external experts with relevant profile and background to conduct the review. Depending on the scope, the experts shall evaluate the quality of the existing EIT-labelled programmes against some of the requirements covered in this Handbook for programme design (Qi1 and Qi2), and/or for results, impact and stakeholder experience (Qi3 and Qi4).

Each programme must evidence how the programme or the specific elements under evaluation fulfil the quality indicators (Qi1, Qi2, Qi3; Qi4) as relevant and required by the EIT guidance. For Qi3 and Qi4 the same logic, templates and grading systems will be used as for the review of the Qi2 qualitative requirements specified above.

For reviewing 3.1. Entrepreneurship competencies and 3.2 Achieved learning outcomes: please note that all student products have already been assessed according to each university's rules and assessment criteria and hence should not be assessed again here, the review focus is on the achievement of EIT OLOs.

Determining the Final Evaluation Score

The final evaluation score should build on the consensus of the external review team. An average score of indicators may be used to inform the decision; however, the scoring of indicators and the overall application should be based on the portfolio application submission and verbal evidence presented by the applicants during interviews. This consensus decision should be explained in the report with justifications based upon the different forms of evidence provided.

In the narrative feedback, and conclusions concrete references to information provided in the application should be made. The lower the final evaluation score, the more thorough and elaborated explanation is expected, to provide the applicants with as detailed feedback as possible in order to learn from the assessment and to address the shortcomings accordingly.

Should the review team not agree on a specific recommendation, the chair of the review team makes the final decision. This situation should be stated clearly and the arguments for the disagreement should be specified.

Table 4: Grading scale for Final evaluation score

Grade	Evaluation	Criteria
1	Does not meet the minimum criteria	Mainly scores of 1 and no evidence that the application meets the requirements for the EIT Label
2	Meets the minimum criteria but still needs improvement	Mainly scores of 2 and limited evidence that the application meets the requirements for the EIT Label
3	Good	Mainly scores of 3 and evidence that the application meets the requirements for the EIT Label
4	Excellent	Mainly scores of 4 and evidence of best practice in design for the EIT Label

What is the final conclusion of the expert team in case of the long-term follow-up evaluation?

The external review team’s conclusion may take 3 different forms – experts can either (a) confirm good status and progress of the programmes, without any further requirements, (b) recommend to keep the EIT Label, but request for adjustments within given timeline, or (c) in duly justified case, when the quality of the programme does not comply with the requirements and/or performance of the programme (following Q13 and Q14) is unsatisfactory, recommend to revoke the EIT Label awarded to the programme.

If the review team does not recommend the EIT Label (a final evaluation score of 1), it should provide clear reasons for this in the final report so that applicants can learn from the process if they should wish to consider making a new application in future years.

Template for the expert team - Final Conclusions and recommendations (long-term follow-up evaluation)

Programme name:	
Level of the programme (Master’s / Doctoral):	
KIC:	
Focus of the evaluation as identified by the EIT	
Evaluation Score for Q12 (1-4):	
Evaluation Score for Q13 (1-4):	
Evaluation Score for Q14 (1-4):	
Final Evaluation Score (1-4):	
Final conclusion of the long-term follow-up evaluation:	

(Good progress and no requirements / Good progress with specific requirements / Unsatisfactory)	
---	--

Specific Requirements (if applicable)

Comments should not exceed 1000 words and should use bullet points where possible. Statements should be qualified with examples and reference to the particular assessment questions / answers and information as provided in the application file.

The list of requirements:

Recommended period to address the requirements (1-2 years):

Review Team Overall Comments

Comments should not exceed 2000 words and should use bullet points where possible. Statements should be qualified with examples.

Date

Name of Chair of review team:

Name of review team members: