Call Guidelines

Business Plan 2023 – 2025

EIT Manufacturing Call 2025 for Innovation proposals

Index

Abbreviations

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

Keywords

Activity	Everything that EIT Manufacturing does is organized into Activities. Each Activity belongs to one Segment, and each Segment to one Area. Each Activity should contribute to the integration of the knowledge triangle of innovation, education, and business creation.
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 specifies the detailed plan of EIT Manufacturing for the upcoming years. Based on the draft Business Plan submitted in September (and some other criteria) EIT decides on the budget available to EIT Manufacturing in the following years. The Business Plan will then be adjusted to match the assigned budget and forms the basis for the internal activity agreements of EIT Manufacturing with its partners.
Services Agreement	Previously "Financial Sustainability[1] Agreement". The Agreement which is signed with the aim of contributing to the Financial Sustainability of the KIC EIT Manufacturing and its community.
Call for Proposals	The call is the instrument used to allocate grant funding by EIT Manufacturing to consortia of organizations, individuals, or third parties to support the deployment and development of the Strategic Agenda through activities. EIT Manufacturing uses two types of calls: (1) general call aligned with the corresponding Business Plan (BP). This type of call involves the different Thematic Areas of EIT Manufacturing (before the year of BP implementation), and (2) ad-hoc call, normally involving only one Thematic Area, which aims to complete or balance

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[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.

	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 any call for proposals' terms, conditions, and criteria are defined and stated according to the principles of transparency, equal treatment, open competition, and sound procedural management.
Call Report	Document summarising the results of the call and its most important outputs, including the ranking list.
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, or a software release upon which the 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 under the Article of Association conditions)
Evaluation Process	The 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 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 proposal's strengths, weaknesses, risks, and commercial and social value. It is an expert deliverable drafted by the rapporteur and presents the consensus on a specific proposal.
Impact Centre	Impact Centre/affiliate of EIT Manufacturing
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 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.
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 reflect the EIT operational objectives for education, entrepreneurship, and innovation, and the KIC specific KPIs defined by EIT Manufacturing that reflect the societal challenge that the KIC is addressing. KPIs need to be reported.
KIC	"Knowledge and Innovation Community" – EIT Manufacturing is one of the 9 KICs that operate under the regulations of EIT.
Milestone	Control points to chart progress. They may correspond to the completion of a key deliverable that allows the next phase of work to begin.
Model Grant Agreement	Model Grant Agreement is used in the Horizon Europe programme financed by the European Commission.
Panel review consensus meeting	All the written external evaluations are discussed in a consensus meeting where the points of scoring, convergence, and divergence are discussed and debated. The evaluation panel reviews all the individual evaluations made on submitted proposals and reaches a consensus about their scoring and ranking. The results of the panel consensus meeting are set out in the minutes and the call report.
Pillar	Used as a synonym for Area
Ranking list	Ranking of proposals selected for funding by the EIT Manufacturing Management Team.
Rapporteur	Member of the evaluation panel who facilitates the discussion during the consensus meeting by synthesizing the individual evaluations of the panel experts and writing the minutes and the evaluation summary report including the evaluation results for each proposal as per the conclusions of the panel.

1. Call summary

Call for Proposals main Features	
Dates[2]	**Call publication:** 22 April 2024 **Call opening:** 29 April 2024 at 10:00 CEST. **Call closing:** 8 July 2024 at 17:00 CEST. **Eligibility and admissibility check:** July 2024 **Evaluation of proposals:** July- October 2024 **Hearings:** October 2024 **Communication of results:** October 2024 **Stand-still period:** October- November 2024 **Start date of the projects:** January 2025
Introduction	The Call for Proposals fosters innovation within the manufacturing sector by addressing pressing industrial challenges and facilitating a transition towards more resilient, sustainable, and human-centered manufacturing practices. It focuses on leveraging cutting-edge technologies and methodologies to improve operational efficiency, sustainability, and the attractiveness of the manufacturing work environment. The call underscores the importance of advancing manufacturing technology, sustainability, and efficiency to maintain global competitiveness.
Duration of the projects	12 months
The total budget allocated to this call	11 EUR million
Links to the submission tool	• New Organization? – register <u>here</u> • New person?[3] - register <u>here</u> • Already registered? <u>Log in to the submission system</u> • <u>Link to support form</u>

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[2] 1 Please note that this calendar is indicative. Dates might be subject to slight changes.

[3] It applies to new persons of already registered organizations

List of documents to be submitted	• Application form to be completed on the submission tool • Business Plan • GANTT chart • SDGs survey • Declaration of Honour duly signed by each member of the consortium
List of documents to take into consideration	• Horizon Europe Model Grant Agreement • EIT Manufacturing Strategic Agenda • Appeal and redress procedure • Eligibility of expenditures • List of KPIs • Sub-criteria expected information and evidence • Financial Support Agreement, including annexes • Activities Monitoring Process Guidelines • Services Agreement coming soon on May 3rd
Evaluationcriteria	*Evaluation criteria assessed by the independent experts*: • Excellence • Impact • Quality and efficiency of the implementation • Strategic fit • European dimension

2. General conditions

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

2.1 EIT Manufacturing mission and strategic objectives

Mission

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

Strategic objectives

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

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

2.2 Knowledge triangle integration

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

2.3 EIT Manufacturing membership

EIT Manufacturing is a KIC[4] of European Institute of Innovation & Technology (EIT). All legal entities participating in the selected proposals need to be part of the 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:

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

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

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

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

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

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

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

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

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

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

[6] Linked Third Parties, called Affiliated Entities under Horizon Europe, are etiher:

- entities that together legally conform to the sole beneficiary (i.e. partner). Ex: Entities A and B form entity C. All three entities (A, B and C) are Affiliated Entities

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

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

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

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

Please take this into account when creating the proposals.

2.4   Gender equality and inclusiveness

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

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

- or eligible entities that have a legal or capital link to the beneficiary that is neither limited to the action nor established for the sole purpose of its implementation.

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

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

A self-declaration will be requested at the proposal stage and the gender equality document will be requested if the activity is funded. If all the above-mentioned mandatory requirements are met through another strategic document, such as a development plan or an inclusion or diversity strategy, it can be considered equivalent. This requirement does not apply to other categories of legal entities, such as private for-profit organisations, including SMEs, non-governmental, or civil society organisations. Applicants must also take all measures to promote equal opportunities between men and women in implementing the proposal and, where applicable, in line with their gender equality plan. They must aim to achieve, to the possible extent, a gender balance at all levels of personnel assigned to the proposal, including at the supervisory and managerial levels.

2.5   EU taxonomy for sustainable activities

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

2.6   Ethics

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

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

2.7   Open science and social science

Open science practices could be implemented as an integral part of the proposal. According to the Horizon Europe Programme Guide, Open science is an approach based on open cooperative work and systematic sharing of knowledge and tools as early and widely as possible in the process.

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

3. Call specific conditions

3.1 Call thematic and expected results

Topic 1: Innovative Solution for Industrial Challenges

Purpose

This topic aims to tackle critical industrial challenges identified across five thematic areas: Industrial Metaverse, Renewable Energy, Circular Economy, Net Zero Industry, and AI-Data. Industrial players have highlighted the urgent need for innovative solutions to address the rapidly evolving landscape of manufacturing. As industries push towards digitalization, sustainability, and enhanced operational efficiency, addressing these challenges becomes paramount for maintaining global competitiveness and improve the manufacturing sector.

Topic/Purpose description

Each proposal must focus on one of the listed challenges that span across the five thematic areas. Proposals should aim to translate industrial challenges into opportunities that pave the way for advancements in the manufacturing sector.

The challenges identified include:

- **Integration of Complex Systems**: Enhancing interoperability and seamless integration of digital twins, XR (Extended Reality), IoT, MES, CRM, etc., to streamline operations and improve decision-making
- **Energy Cost Management**: Implementing solutions that match renewable energy supply with production needs, ensuring smart use of energy to improve manufacturing efficiency despite energy prices fluctuating, and introduce innovative energy storage to enhance cost predictability and boost energy independence.
- **Implementing Circularity in Manufacturing**: Creating technologies and methodologies to enhance the recycling of materials, boost the implementation of remanufacturing processes, and upgrade Life Cycle Assessment (LCA) tools, integrating the Digital Product Passport to better trace materials and products, assess environmental impacts, and ensure quality.
- **Data-Driven Product Development**: Leveraging artificial intelligence and industrial metaverse technologies for full virtual validation of New Product Introduction, including early stages of concept design, prototype testing with simulations, virtual commissioning of production processes and ensuring robust testing and and supporting circular design.

- **Decision-Making Support for Complex Machinery and Value Chain**: Utilizing AI and advanced data analytics, exploring also the potential of Generative AI ,to provide decision-making support for the operation and management of complex machinery and integrate Digital Product Passport to facilitate the optimization of intricate value chains.

Applicants are encouraged to select and address one of these challenges, demonstrating a clear understanding of the issue and proposing a scalable and impactful solution. Proposals should articulate how the solution can be applied within the current industrial landscape to foster significant advancements in manufacturing technology, sustainability, or efficiency.

Expected outcomes & impacts

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

- Enhanced work environment to make manufacturing jobs more attractive, safe, and inclusive, supporting EIT Manufacturing Strategic Objective "Put people at the centre of manufacturing innovation" and long term KPI of % of upskilled employees working in the manufacturing sector.
- Improve resource efficiency to start a shift towards zero-waste processes, supporting the EITM Manufacturing Strategic Objective "Accelerate green manufacturing" and long term KPI of % of circular material use
- Decarbonization initiatives, setting the foundation for net-zero carbon manufacturing, supporting the EITM Manufacturing Strategic Objective "Accelerate green manufacturing" and long term KPI of % of circular material use rate and % of reduction of GHG emissions compared to 2005.
- Digital transformation for enhanced decision-making and operational efficiency, supporting EITM Manufacturing Strategic Objective "Foster sovereignty and competitiveness" and long term KPI of % of revenue growth in manufacturing.

Proposals should set out a credible pathway for the activity to contribute to one or more of the following expected impacts:
- Establishing Europe as a global exemplar in circular manufacturing processes, significantly contributing to environmental sustainability and resource efficiency.

- European manufacturers possess unmatched flexibility to adapt to market changes and safeguard data sovereignty, leveraging advanced digital technologies.
- Strengthened collaboration within the European manufacturing ecosystem, especially with RIS countries, enhancing overall resilience and innovation capacity.

Topic 2: Transition towards a resilient and human-centered Manufacturing

Purpose

This topic invites ambitious projects that align with EIT Manufacturing's Strategic Objectives on enhancing manufacturing system flexibility and supply chain resilience and reinforcing the attractiveness of the manufacturing work environment through technologies and digitalisation, addressing the critical need for a transition in the manufacturing sector.

The purpose is twofold: to support Europe's manufacturing capability in facing global supply chain challenges and to ensure that the sector advances in harmony with social sustainability goals. Proposals should contribute to the strategic objectives by fostering innovations that either strengthen resilience and resource availability or enhance human-centric manufacturing solutions.

Topic/Purpose description

Under this topic, applicants are invited to focus on one of the following two sub-areas:

- **Resilience and Resource Availability**: Projects should focus on fortifying supply chain resilience, exploring alternative and advanced materials, and developing local sourcing strategies. The goal is to mitigate risks related to resource scarcity and supply chain vulnerabilities, contributing to the strategic objective of fostering sovereignty and competitiveness.
- **Human-Centric Manufacturing Innovations**: Proposals in this sub-area should aim to create a safer, more inclusive, and well-integrated working environment. Projects should prioritize the well-being and safety of the workforce and ensure that technology adoption not only respects but also enhances human factors in manufacturing settings.

Applicants should clearly articulate how their proposed solutions contribute to the overarching strategic objectives of EIT Manufacturing, addressing either resilience and resource optimization or human-centric innovation.

Expected outcomes & impacts

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

- Enhanced work environment to make manufacturing jobs more attractive, safe, and inclusive, supporting EIT Manufacturing Strategic Objective "Put people at the centre of manufacturing innovation" and long term KPI of % of upskilled employees working in the manufacturing sector.
- Improve resource efficiency to start a shift towards zero-waste processes, supporting the EITM Manufacturing Strategic Objective "Accelerate green manufacturing" and long term KPI of % of circular material use rate
- Decarbonization initiatives, setting the foundation for net-zero carbon manufacturing, supporting the EITM Manufacturing Strategic Objective "Accelerate green manufacturing" and long term KPI of % of circular material use rate and % of reduction of GHG emissions compared to 2005.
- Digital transformation for enhanced decision-making and operational efficiency, supporting EITM Manufacturing Strategic Objective "Foster sovereignty and competitiveness" and long term KPI of % of revenue growth in manufacturing.

Proposals should set out a credible pathway for the activity to contribute to one or more of the following expected impacts:
- Establishing Europe as a global exemplar in circular manufacturing processes, significantly contributing to environmental sustainability and resource efficiency.
- European manufacturers possess unmatched flexibility to adapt to market changes and safeguard data sovereignty, leveraging advanced digital technologies.
- Strengthened collaboration within the European manufacturing ecosystem, especially with RIS countries, enhancing overall resilience and innovation capacity.

3.2   Duration and Technology Readiness Level[8]

This call is open to proposals with duration of **12 months**.

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

The consortium must propose an innovation with a **TRL of at least 7** at the start of the project. The "demonstration in an <u>operational environment</u>" has to be proven (test reports, videos...) in the "Business Plan" attachment.

The solution is expected to **achieve TRL 8 or higher** by the end of the activity. The business owner's involvement and effort in the definition and execution of the commercialisation plan, which is expected to start from activity kick-off, should be described in the workplan.

3.3 Applicants profile

Entities eligible to participate[9]

Any legal entity, regardless of its place of establishment, including legal entities from non-associated third countries or international organisations <u>is eligible to participate (whether it is eligible for funding or not)</u>, provided that the conditions laid down in the Horizon Europe Regulation[10] have been met, along with any other conditions laid down in the specific call topic.

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

Entities eligible for funding

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

- 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.

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[9] 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**.*

[10] Regulation (EU) 2021/695 of the European Parliament and of the Council of 28 April 2021 establishing Horizon Europe (OJ L 170 , 12.5.2021, p. 1)

– the countries associated with Horizon Europe and the low- and middle-income countries[11].

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

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

Consortium composition

Only legal entities forming a consortium are eligible to participate. The consortium must include at least 3 legal entities independent from each other[12] established in countries covered by at least two different EIT Manufacturing ICs[13].

The participants in each consortium must cover, at least, the following roles:
• Lead Partner. The organisation in charge of coordinating the consortium through the Activity Leader. The Activity Leader will be the direct contact for EIT Manufacturing and is responsible for the coordination of the consortium, including the implementation of the workplan, the execution of the budget, the submission of the deliverables, the risk management and mitigation and the impact achievements of the overall activity. The role of Activity Leader is open to any entity participating to the call for proposals.
• End-Users. At least 2 different organisations that will deploy the key marketable innovation(s) in their production facilities to fulfil a specific need or achieve a business objective in a real-world industrial environment. The end-users must be consumers of the key marketable innovation(s) and each of them must provide at least 1 use case, testing and implementing the innovation(s) in their real industrial environment. Specifically for Topic 2, including additional end-users beyond the

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[11] See the Horizon Europe List of Participating Countries on the Portal for an up-to-date list of these countries https://ec.europa.eu/info/funding-tenders/opportunities/docs/2021-2027/common/guidance/list-3rd-country-participation_horizon-euratom_en.pdf

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

mandatory ones will be considered a positive factor, indicating a broader acceptance and scalability of the innovation(s) within the industry.

- Business Owner. The organisation in charge of the commercialisation of the key marketable innovation(s) with a legal entity established in a Member State or Horizon Europe Associated Country. The Business Owner will be the direct contact for EIT Manufacturing and the consortium for the Services Agreement and responsible for the commercialisation plan and its execution. A suitable Business Owner is a for-profit organisation, with a track record in creating new businesses, and in building marketing and commercialisation strategies. The organisation has a deep understanding of the identified market, its competitors, and barriers to entry, and most importantly a proven track record of sales and customers in the target group sector identified by the consortium. All these elements should be clearly described in the proposal (see "Business Plan" template).

3.4   Key Performance Indicators (KPIs)

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

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

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

KPI	Short title	Minimum Target
EITHE02.4	Number of innovations introduced on the market during the KAVA duration or within 6 months after completion with a sales revenue of at least 10 000 EUR documented	1

In case the above KPI is met by an entity belonging to a RIS countries, the corresponding RIS KPIs EITHE02.2-EITRIS must be included as well. Please note that this is not a supplementary KPIs and only reflect the RIS aspect of the core KPI.

Proposal contributing also to the EITHE04.4 KPI are strongly encouraged and will be positively evaluated.

KPI	Short title	Minimum Target
EITHE04.4	Number of start-ups established as a result/ based on the output of KAVA or start-ups created for the purpose of an innovation project to organise and support the development of an asset having financial transactions of at least 10 000 EUR for services/products (result of the KIC KAVA) sold to customers.	1

In case the above EITHE4.4 KPI is met by an entity belonging to a RIS countries, the corresponding RIS KPIs EITHE04.2-EITRIS must be included as well. Please note that this is not a supplementary KPI and only reflect the RIS aspect of the core KPI. **Proposals are also encouraged to contribute to the additional EITHE01.1 KPI.**

KIC	Short title of KPI
EITHE01.1	Number of innovative products, processes and methods & Intellectual Property Rights (IPR) applications resulting from KIC activities

3.5 Dissemination, communication, and exploitation

Applicants must engage in dissemination, communication and exploitation of the results of the activities. Applicants needs to respect the provisions of Article 16 regarding the Intellectual Property Rights (IPR) — Background And Results — Access Rights And Rights and Article 17 regarding Communication, dissemination and visibility rules of the (Model) Grant Agreement.[14] including branding guidelines and obligations. Communication activities and infrastructure, equipment of major results funded by the grant must display the KIC's logo with the following text: "KIC [name] is supported by the European Institute of Innovation and Technology (EIT), a body of the European Union").

3.6   Budget and funding

The total maximum EIT funding allocated to this call is up to 11 EUR million. The amounts will be allocated according to the below estimation.

Call Thematic	Total EIT funding allocated	EIT funding per proposal
Topic 1	7 EUR million	0.7 EUR million
Topic 2	4 EUR million	1 EUR million

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

Please note that the information above is provided for information only and does not constitute any kind of commitment on behalf of EIT Manufacturing. Final EIT funding allocated might vary significantly based on the number of proposals evaluated and selected and other factors.

The exact number of activities to be funded will depend on the quality of the proposals received and total funding available.

<u>Activity proposals submitted to this call are expected to have a minimum co-funding rate of 30%</u>

The minimum co-funding rate refers to the total project budget. Partners in a consortium may have different co-funding rates as long as the overall project co-fund meets the required minimum.

3.7 Payment scheme and Certified Financial Statement

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

• First instalment, corresponding to 35% of annual EIT funding

• Second instalment, corresponding to 25% of annual EIT funding

• Last payment corresponding to the 40% of annual EIT funding

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

Prior to the payment, the cumulative funding received by an individual entity in the Business Plan 2023- 2025 for all the EIT Manufacturing projects they participate in will be checked. Whenever an entity reaches a cumulative EIT funding of 430,000 EUR, a Certified Financial Statement (CFS) audit will be requested prior to the payment.[15] The CFS audit will be performed by an external auditor. EIT Manufacturing will provide the reference of the appointed auditor.

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

The CFS review is independent from the Activity monitoring described in paragraph 3.10. The scope of the CFS audit is to check the eligibility of the costs reported so far by a specific entity for all projects where they participate, altogether. The first CFS audit will check costs reported up to a specific date "D". A second CFS audit (meaning an entity reaches again a cumulative EIT funding of 430,000 EUR) would check the costs reported from date "D+1 day" to date "D2", and so on. The result of each CFS audit can be either:

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

3.8   Eligibility of expenditures

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

3.9   Financial sustainability – Services Agreement

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

Description of services

The Services Agreement describes a list of services which will be provided to the consortium during the implementation of the activity and offers the possibility for the business owner to receive additional support after the end of the activity. It will give access to the following services.

- During the activity:
    - Dedicated support from an EITM Project Manager;

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

Payment conditions

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

1. An initial payment of EUR 50,000 triggered at the end of the activity, corresponding to the provision of services during the activity. This amount is expected to be shared among all consortium members.
2. Subsequent payments, according to a revenue sharing mechanism for a duration of 5 years, to be paid by the business owner. The payments will be due in Q1 of a given year relative to the total sales of the previous year. This mechanism will be triggered by the first subsequent sales of the key marketed innovation beyond the first EUR 10,000 needed to reach EITHEO2.4 KPI, and the first payment will cover sales performed during the year of the first sales.

Business owners can select the percentage of revenue sharing of the mechanism. However, this percentage should not be lower than 5%, and the total estimated payment to EIT Manufacturing, calculated from the revenue projections provided in the application, should be at least equivalent to the grant requested.

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

Alternative mechanism for start-ups

If the business owner is a start-up or a start-up to be created during the activity, it can request to convert the above mechanism to an equity shares agreement by ticking the associated box in the application form. In this case, the start-up business owner can

contribute the financial sustainability requirement by offering equity instead of cash. If the proposal is selected, the business owner would then go through EIT Manufacturing internal investment evaluation process in parallel to the activity implementation. In case of successful evaluation, the business owner would enter a negotiation with EIT Manufacturing regarding the equity shares agreement.

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

3.10   Activity monitoring

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

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

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

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

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

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

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

Type of underperformance	Funding reduction [16]
Missing Core EIT KPI	20%
Missing DEL	10%

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

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

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

3.11 Mandatory deliverables

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

Deliverable name	Delivery date (in months)
Consortium agreement (including clear rules regarding the exploitation of IP generated during the activity)	Within the first 3 months of the activity
Plan for dissemination and exploitation including communication activities	Within the first 6 months of the activity
Final Business Plan	Within the first 6 months of the activity
Gender equality plan	Within the first 6 months of the activity. Only public or private research organizations or higher education establishment.
Sustainability report	Month 11

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

Result Report	By the end of the activity
Publishable summary of achievements to be used as dissemination material by EIT Manufacturing	By the end of the activity

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

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

4. Proposal preparation and submission

4.1 Guidance and support on proposal preparation

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

Call information event

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

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

Call Contacts

Access to Agora, EITM 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. All applicants may contact EIT Manufacturing to ask questions and clarify any points on general/technical aspects and call content by contacting support@eitmanufacturing.eu and innovation@eitmanufacturing.eu.

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

4.2 Registration and submission process

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

1. EU Participant Portal to obtain a PIC number.[17] If you have already participated in projects funded by the EU before and have your PIC number validated, you can proceed with the registration of your organisation on the submission tool. If this is your first time participating in an EU-funded project or your organisation

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[17] https://ec.europa.eu/info/funding-tenders/opportunities/portal/screen/how-to-participate/participant-register

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

2. Submission tool[18] expression of interests (LINK) to participate to the call. Please note that the expression of interests processing is not automatic and needs to be reviewed and approved by the EIT Manufacturing team after the registration by the applicants. If you have already participated in calls of EIT Manufacturing before, you can proceed with the next steps and the proposal creation. Please make sure that the information that you are providing on the submission tool is consistent with the legal information connected to your PIC (legal name, VAT, registration number, legal address, LEAR – legally appointed representative responsible for updating the organisation's information on the EU participant portal).

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

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

4.3 Proposal submission mandatory documentation

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

- Online application form;
- Business Plan;
- GANTT chart;
- SDGs survey;
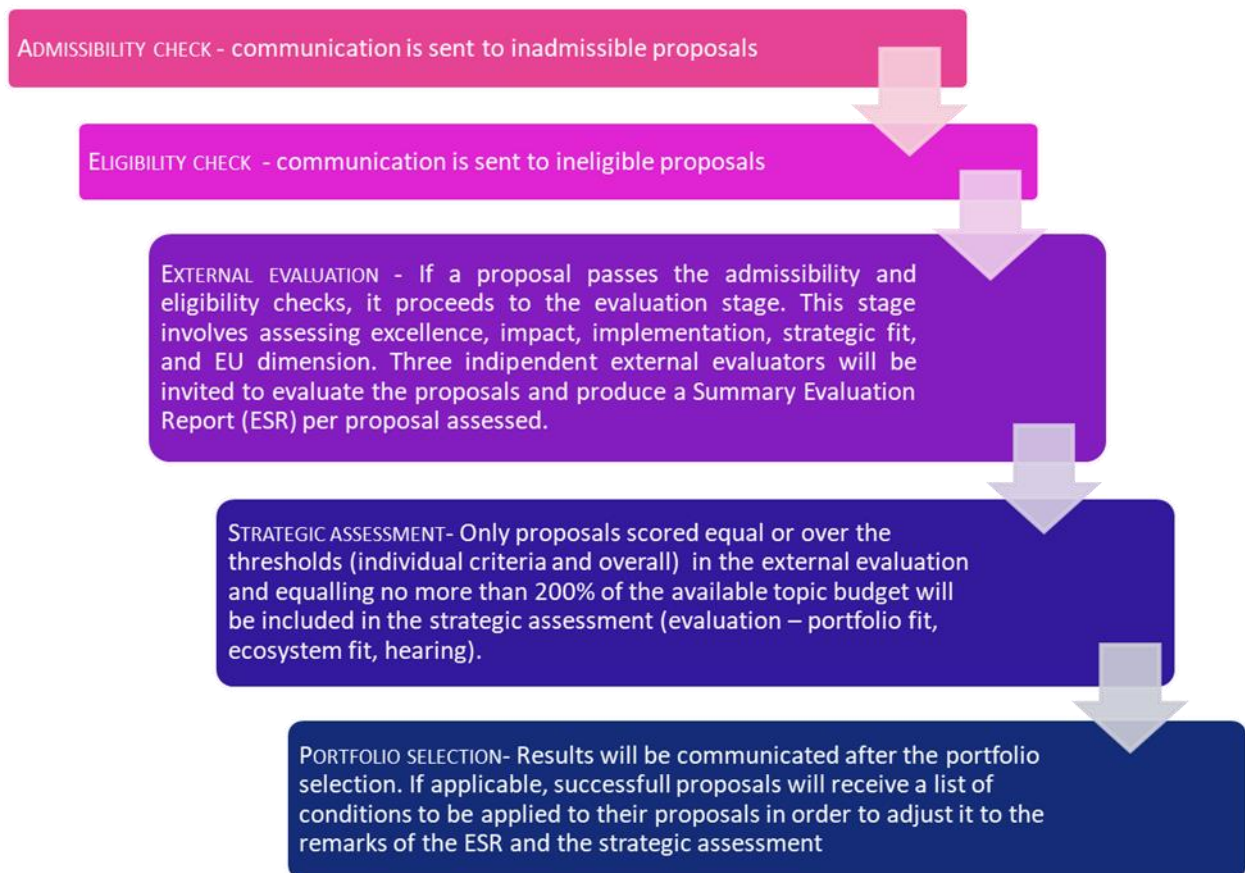- Declaration of Honour duly signed by each member of the consortium.

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[18] Links to the submission tool are provided on the page 8.

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

5. Proposal evaluation and selection process

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

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

External evaluation	Excellence	Max score 15 Threshold 9/15
	Impact	Max score 25 Threshold 15/25
	Implementation	Max score 15 Threshold 9/15
	Strategic fit	Max score 15 Threshold 9/15
	EU dimension	Max score 10

		Threshold 6/10
Total points external evaluation		80 Threshold 48/80
Strategic assessment		
	Remote assessment	Max score 10
	Hearing	Max score 10
Total points strategic assessment		20 Threshold 12/20
Total points (external evaluation + strategic assessment)		100

5.1 Admissibility check

Applications must be:

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

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

5.2 Eligibility check

A proposal will be eligible if it shows:

Consortia composition	<u>The consortium shall be composed of</u> minimum 3 legal entities <u>independent of each other</u>[19] that are established in countries covered by, at least, 2 different EIT Manufacturing ICs. Additionally the following roles shall be clearly covered within the consortium: The following roles shall be clearly covered within the consortium:

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

	• 1 Lead Partner. The organisation in charge of coordinating the consortium through the Activity Leader. The role of Activity Leader is open to any entity participating to the call for proposals. • End-users. At least 2 different organisations that will deploy the key marketable innovation(s) in their production facilities to fulfil a specific need or achieve a business objective in a real-world industrial environment. • Business Owner. The organisation in charge of the commercialisation of the result(s). The role of Business Owner is limited only to organization with a legal entity established in a Member State or Country associated to Horizon Europe at the time of submission of the application

Proposals containing one or more ineligible elements will receive an official communication from EIT Manufacturing setting out the outcome of the eligibility check and explaining why the proposal failed to meet the criteria.

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

5.3   External evaluation

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

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

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

Score	Description

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

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

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

The detailed sub-criteria evaluation grid is provided here below. For each sub-criteria, specific information and evidence are expected. Please refer to the "Sub-criteria expected information and evidence" document in the call webpage.

| Excellence | Max. scoring 15 |
	Threshold 9/15
Coherence	
The proposal is clearly describing its objective(s) with relevant and quantitative targets that are achievable and measurable.	5 points
Novelty	
The result of the activity represents a non-trivial step forward compared to the current state-of-the-art, in terms of technology, application and/or business model.	5 points
The consortium provides tangible evidence of the starting TRL (Technology Readiness Level) of the solution, and the path towards TRL 8 by the end of the activity seems feasible and is well substantiated.	5 points
Impact	Max. scoring 25
	Threshold 15/25
Project pathways towards impact	
The consortium presents the 'Market Opportunity' of the solution in a comprehensive and accurate way in the Business Plan, detailing the product or service description, value proposition, target customers, market size, industry analysis, competitor landscape, and barriers to entry with clarity and depth.	5 points
The consortium outlines a robust 'Strategy & Execution' plan in the Business Plan, showcasing a well-developed marketing and sales strategy, a detailed go-to-market plan and intellectual property strategy, and a comprehensive SWOT analysis, indicating a strong understanding and expertise of the business stakes.	5 points
The consortium presents a credible and ambitious 'Ownership & Financial' plan in the Business Plan, including attractive revenue projections, a realistic break-even analysis, and detailed business owner information and track record, demonstrating capability to successfully launch the solution into the market and long-term viability.	5 points

Social and/or environmental impact addressed by the proposal in the SDGs survey is significant, credible and measurable.	5 points
Effectiveness of the proposed measures to exploit the key marketable innovation(s) and to maximise impact	
The proposal's contribution to achieving the mandatory EIT Core KPI is evaluated as feasible and credible, and the Dissemination Plan (including communications and outreach) is in line with the outlined commercial strategy.	5 points
Implementation	**Max scoring 15**
	Threshold 9/15
Workplan, including allocation of budget, tasks, and resources	
The proposal budget and resources allocated are clearly outlined, justified and reflects value for money.	5 points
The workplan and KPIs are aligned with proposal overall objective, including the management of the relevant risks identified.	5 points
Consortium fit for purpose	
The applicants represent the right competencies, skills and expertise per the proposal scope and they have differentiated, clear and specific roles. Specifically for Topic 2, additional end-users beyond the mandatory ones will be considered a plus.	5 points
Strategic fit	**Max. scoring 15**
	Threshold 9/15
The proposal and described expected outcomes and impacts are aligned with the topic selected and they contribute to achieve one or more EITM Strategic Objectives.	5 points
The preliminary Skills Development Strategy presented is credible and the consortium identified the skills gap and training needs to facilitate the adoption and scalability of the solution. A Final Skills Development Strategy Deliverable (that will include the summary presentation of the training material developed and the result of the training test done with the end-users) will be considered a plus.	5 points

The proposal offers an ambitious financial sustainability return to the KIC.	5 points
European Dimension	**Max. scoring 10**
	Threshold 6/10
The consortium demonstrates pan-European outreach and the budget is fairly distributed across different countries and CLC.	5 points
The proposal meaningfully addresses the RIS aspects (engagement of RIS countries in the activity and impact generated in RIS countries by the result(s) exploitation)	5 points

5.4 Strategic assessment and portfolio selection

Starting with the highest-scoring proposal and proceeding in descending order, a selection will be made of the best-ranked proposals that meet or exceed the thresholds in both individual criteria and overall (consensus meeting results). Only proposals requesting aggregated financial support equalling to no more than 200% of the available budget per topic will be shortlisted for the strategic assessment and portfolio selection. The strategic assessment consists of a remote assessment and a hearing totalling up to 20 additional points. Proposals that do not reach or exceed the threshold of 12 points on this assessment will not be considered for the final selection.

Remote assessment

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

Criteria	Max Score
Portfolio fit	5 points
Ecosystem fit	5 points

Hearing

The hearing jury is composed of 3 members of the Management Team, nominated by the CEO based on subject matter relevance (e.g. innovation director, investment director, CFO, etc.) and supported by internal subject matter experts (in a consulting role, not

voting) as needed. The hearings will be held online. A maximum of 3 persons may represent a proposal. Only individuals mentioned in the proposal and involved in project implementation can represent the proposal during the hearing. No consortium participant may provide more than 1 person for the hearing.

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

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

A template, specific questions, and further instructions on how to prepare for the hearing will be provided to shortlisted applicants together with the invitation to the hearing..

A maximum of 10 additional points will be assigned by assessing the hearing performance as follows:

Criteria	Description of criteria	Max Score
Hearing performance	• Credibility and quality of the pitch delivered. • Cohesion and motivation of the consortium • Clarity on the responses to the questions asked • Responses to issues and concerns expressed in the external evaluation ESR, if applicable.	10 points

Portfolio selection

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

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

5.5 Call Report and Stand-still period

At the end of the evaluation process and when the portfolio selection is completed, EIT Manufacturing sends the Call Report & the Final ranking list to the granting authority (EIT) and applies a stand-still period of 30 days before signing agreements with the selected recipients, in order to allow the granting authority to verify compliance with the procedural requirements.[20]

5.6   Communication of results and negotiation period

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

The applicants might receive 4 types of evaluation feedback:

- The proposal is accepted for funding. The proposal has got a high evaluation score and is selected for funding based on available budget assumptions.
- The proposal is accepted for funding with conditions. The proposal has got a high evaluation score and is selected for funding based on available budget assumptions. Conditions for changes will be provided from EIT Manufacturing. Changes shall be done and re-submitted on time.
  If the Proposal Leader fails to comply with the requested conditions or does not respond by the time allocated, the proposal will be rejected and the next proposal on the ranking list will be then proposed for funding.
- The proposal is rejected. The proposal has failed to reach the threshold of an individual evaluation criterion or the overall threshold and is therefore not considered for funding.
- The proposal is retained in the reserve list: the proposal has passed all thresholds but due to budget constraints it cannot be funded. In case of finally unused budget, the proposal might become eligible for funding, e.g., in case a proposal accepted with conditions is not funded. The duration of the reserve list is up to end of March 2025.

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

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

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[20] According to Rules on page 127-129 of the Horizon Europe MGA (https://ec.europa.eu/info/funding-tenders/opportunities/docs/2021-2027/common/agr-contr/general-mga_horizon-euratom_en.pdf)

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

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

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

5.7 Procedure for complaints and appeal

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

6. Other Terms and Conditions

6.1 Exclusion Criteria

Applicants will be excluded from participating in the call if they are in any of the situations of exclusion defined in Article 136 of the EU Financial Regulation.[21]. All members of a consortium shall sign a Declaration of Honour in order to confirm that they respect the above-mentioned criteria at the application stage. Successful Applicants shall provide, if requested by EIT Manufacturing, relevant recent documentation substantiating the Declaration of Honour at the latest before signing the agreements mentioned under point 5.6. Failure to provide adequate documentation may result in the exclusion of the applicants and the proposal concerned.

6.2 Logos and Trademarks of the Applicants

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

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

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

form, whenever and however disclosed and might also be included in the application form. Confidential information must be expressly labelled as such in the application form. Applicants agree that EIT Manufacturing and its subsidiaries can disseminate, publish, and make use of non-confidential information regarding the call, to promote the activities of EIT Manufacturing or establish reports or other necessary documents for EIT.

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

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

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

6.4   Intellectual Property

Participating entities agree to respect IPR Rules (Article 16) of the (Model) Grant Agreement.[22].

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 the 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.

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

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

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 its subsidiaries.

By submitting your application for this call, you consent that EIT Manufacturing will collect, transfer, process, store and delete your data in accordance with the aforementioned conditions.

Details concerning the processing of your personal data are available in the privacy statement in the submission tool.

6.7   Applicable Law

The present call is governed by the applicable European Union laws (i.e. the EIT Regulation, the EU Financial Regulation and the Horizon Europe Regulation) and is complemented, where necessary, by the laws of France. The applicants agree to observe the obligations set forth in the (Model) Grant Agreement.[23] signed between the EIT and EIT Manufacturing and particularly Articles 12 (conflict of interest), 13 (confidentiality and security), 14 (ethics), 17.2 (visibility), 18 (specific rules for carrying out action), 19

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

(information) and 20 (record-keeping). These obligations will also be mentioned in the contracts to be signed if the application is successful.

6.8   Rights to activate audits

EIT Manufacturing retains the right to activate an audit on the funded activities in case of alerts and/or to confirm governance and proper usage of the grant.
EIT Manufacturing keeps the right to request any data related to the activity for 5 years after completion to ensure transparency and allow monitoring from EIT.