Business Plan 2023–2025

Targeted 4

Open Call 2025

Guidance for Applicants

EIT Urban Mobility - Mobility for more liveable urban spaces

EIT Urban Mobility

Barcelona| 2 September 2024

eiturbanmobility.eu

History of changes

Version	Publication Date	Change
1.0	02.09.2024	Initial version

Any updates to these Guidelines are identified in the table above. Amended versions of this document are published on the EIT Urban Mobility Call website.

Contents

1. Register and apply

1.1 PIC and PIF registration

The first step one organisation must take, to be able to apply for an EIT Urban Mobility Call, is to register in the EU Funding & Tender Portal and obtain a **valid PIC number**.

You can verify directly on the EU Portal whether your organisation is already registered and has a PIC: https://ec.europa.eu/info/funding-tenders/opportunities/portal/screen/how-to-participate/participant-register-search

Once an organisation has a PIC number, it will be possible to register in the new EIT UM NetSuite platform, by submitting the Partner Information Form (PIF).

For organisations that previously applied to an EIT Urban Mobility Call for Proposals, and therefore are already registered in the PLAZA platform, please contact the EIT Urban Mobility Service Desk servicedesk@eiturbanmobility.eu. You will be then provided with the credentials to access the new NetSuite platform.

1.2 Search for open calls and apply

Once you land on the **homepage of the portal**, click on the menu, Call for Proposals, Open Calls:
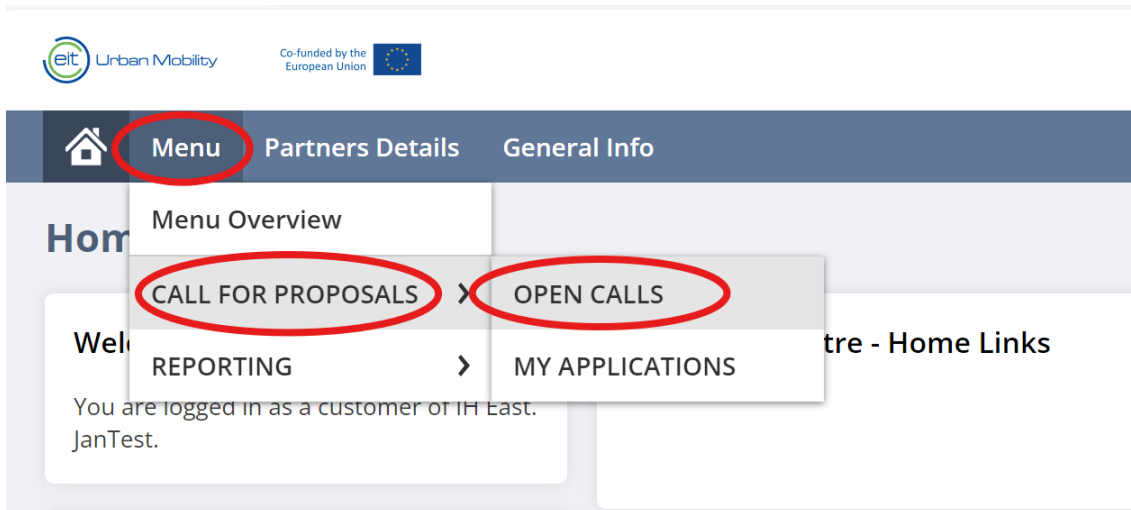
You will see the list of all EIT Urban Mobility Calls currently open. Choose **Targeted Open Call 4** from the list and click on the "**apply**" icon:

Once you click on "apply" a new Application Form (AF) is created and you will be able to start filling it in with all the information of your project. The AF is divided into six different tabs, each containing a set of information.

Once you start working on your AF, we recommend you to **save (SaveAsDraft) often**, especially when you move from one tab to another.

You will be able to find your draft application as shown here below. In the "My applications" section, you can also see if your application is still in draft or was submitted.

2. Main Information

The ID proposal number is automatically assigned by the system when you first save your proposal.

First, you will have to indicate to which Topic challenge according to the Call Manual you are applying.

When entering the **project title and acronym**, remember this will be the official name publicly used to promote your project.

In the framework of the Targeted Call, projects should not be longer than **12 months** and should end latest on 31 December 2025 (as indicated in the Call Manual).

The sections "total budget", "total EIT funding" and "total co-funding" will be populated automatically by the system once you insert the budget.

When writing the **executive summary**, remember this must provide a comprehensive but general overview of the project and that, if your project is selected for funding, it will be used for dissemination purposes. We suggest you to fill in this section once you have completed all other sections and therefore have a clear overview of your project.

You must enter a **minimum of three and a maximum of five keywords** (to be selected from a drop-down menu) and a **minimum of three and a maximum of five self-defined keywords** (which you can therefore freely type). Make sure you select the keywords that best represent your project. You can type in a word to see available pre-defined keywords.

To enter a **self-defined keyword**, click on "new keywork", type the word and press "enter" to save it.

* List of Keywords Related to this Project

Please provide a minimum of three and a maximum of five keywords

> Select

* Free Self-defined Keywords

please provide a minimum of three and a maximum of five keywords   + New Keyword

* Free Self-defined Keywords

please provide a minimum of three and a maximum of five keywords   Lorem ipsum   11 / 80

Before moving to the next tab, remember to **click on the "save" button**.

3. Partner Information

The "**Project Leader EN**" is automatically assigned by the system, and it is the organisation of the contact that creates the Application Form.

The **e-mail of the main contact person** is also automatically populated and is always the e-mail address of the contact that created the Application Form.

| Main Information | Partner Information | Project Scope | WorkPlan | Supporting Documents | Budget |

Partner Information

* Project Leader (EN)

Please indicate the Lead Partner organisation for the proposal. This person will create, edit and submit the proposal. If your organisation is a partner or an Affiliated entity registered in PLAZA but is not visible in the dropdown list, please contact servicedesk@eiturbanmobility.eu

| CUS6853 JanTest | ∨ |

* Project Leader main contact person e-mail

This is the Project Leader's e-mail address as provided in the system at the time of the first registration.

In the section "**partners involved in the project**" you must list all partners that will be involved in the project (if applicable) and describe what will be their **role and contribution**.

The project leader is automatically included by the system in the list. All other partners (if any) must be added by clicking on the "plus" button.

Partner (Input the PIC number)	Partner description	Action
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		➕

Once you click on the "plus" button, you must enter the **full PIC number of that specific partner**. Once you enter the full PIC, you will be able to select the organisation from the drop-down menu and include it as a partner.

If the organization you are looking for is not found in the list, please invite them to register here.

In the case of consortia, once you have added all partners, you must indicate if there is any **direct link** between any of them. If there is a direct link, you must indicate which partners are linked and which type of link they have.

Two participants (legal entities) are dependent on each other where there is a controlling relationship between them:

- *A legal entity is under the same direct or indirect control as another legal entity; or*
- *A legal entity directly or indirectly controls another legal entity; or*
- *A legal entity is directly or indirectly controlled by another legal entity.*

Control: Legal entity A controls legal entity B if:

- *A, directly or indirectly, holds more than 50% of the nominal value of the issued share capital or a majority of the voting rights of the shareholders or associates of B, or*
- *A, directly or indirectly, holds in fact or in law the decision-making powers in B.*

The following relationships between legal entities shall not in themselves be deemed to constitute controlling relationships:

a. *the same public investment corporation, institutional investor or venture-capital company has a direct or indirect holding of more than 50 % of the nominal value of the issued share capital or a majority of voting rights of the shareholders or associates;*
b. *the legal entities concerned are owned or supervised by the same public body.*

Under the section **"Co-Editor"**, you can also add any contact to whom you wish to grant **co-editor rights**. To add a contact, you must introduce the full and correct e-mail address. At that point, you will be able to select the contact from the drop-down menu.

If you cannot find your contact in the drop-down menu, you must ask the contact to register in NetSuite or to be added as the contact person of an organisation already registered in the system.

We suggest granting co-editor rights only to a limited number of people and only when their direct contribution in filling in the Application Form is needed.

If you have one or more co-editors assigned to your proposal, make sure no more than one user is working on the AF at the time. If more users are working simultaneously in the AF, the system will not be able to save the work of all users and this will cause a loss of information.

We also suggest that only the creator of the AF does the final submission of the proposal.

If you click on the "+" button to add a contact but you cannot find the user, remember to click on the delete button otherwise the system will give you an error message when clicking on "save".

Before moving to the next tab, remember to **click on the "save" button**.

4. Project Scope

For this whole section: we recommend you to prepare the answers offline and copy-paste them in the Application Form only once they are finalised. When filling in the final information in the system, we recommend you to **save often** (do not wait to have the whole tab completed before saving).

Remember that you are **not allowed to include any urls** in your Application Form.

Under the project scope tab, you will be asked to define the **main objectives** and the **scope** of your project:

You will then be required to reply to all the call-specific questions, in particular:

- **Outcomes and impact:** Explain how your proposal is aligned with the expected outcomes and impacts of the topic selected as well as with the proposed KPIs. Describe this at a quantitative and qualitative level. State the potential social, environmental and economic impact generated by the successful delivery of your project. This should include impacts on cities, business ecosystems, specific end-users and society in general.
- **Workplan:** Concisely outline the work planned for the project's entire duration. This description should provide sufficient information on work packages, key tasks and milestones to be achieved, their timeline and related Objectives, KPIs and expected outcomes (Deliverables, Outputs). Use a logical or chronological ordering.
- **Market Need:** What is the customer need that you are addressing and how you have verified it is a true pain point? (Mandatory) Include a Business Model Canvas as a supporting document
- **Proposed Solution:** Describe the product/service/solution you envision and the core sub-elements (components, modules and functionalities to be developed) as well as its scalability potential.
- **Technology Readiness Level:** Specify the technical characteristics that justify a starting TRL of 6-7. Identify any background work or projects. List major milestones that need to be achieved to take the solution towards a TRL8-9 and their timeline. Identify the responsible partners for these milestones and make sure this is aligned with the proposed workplan and partner roles.

- **State-of-the-art:** Describe the core innovation/technology that is fundamental to the solution you intent to provide. Please explain how it represents a step forward regarding current state-of-the-art innovation.
- **Addressable market:** Include a brief description of the customer who will buy the product or service and the addressable market that these customers represent.
- **Unique selling points and competitive advantage:** What are the competitive alternatives and how does your solution compare to them? Please compare key features of your offering to that of competitors on the market and in development.
- **Business model and commercialisation strategy:** How will the solution be delivered to the customer? Describe your commercial strategy (pricing, placement and promotion).
- **Startup created (if applicable):** In case you contribute to KPI EITHE04.4, please describe the company that you would be creating (e.g. company set-up, country of registration, timeframe, shareholders, capitalisation and growth plan). Present a credible and robust strategy for creating a startup and support its growth after the project implementation.
- **1st city demonstration/pilot/living lab:** Describe the demo requirements, key metrics to be achieved (e.g. target number of users, scale of the testing area, duration) and its future scalability and transferability. State the level of commitment of the demo host and describe how the project aligns with the demo host strategic priorities.
- **Additional city demonstration/pilot/living lab (if applicable):** Describe any other demonstrations you plan to implement during the project.
- **Project Management Structures and Procedures:** Please explain how you will manage the project to ensure effective and professional delivery of the project outcomes.
- **Communication and Dissemination Plan:** Please describe the dissemination plan to be carried out during the project implementation, including actions for each target group. The communication plan should align with the commercial strategy.
- **Gender and diversity dimension:** Please describe how gender and diversity are considered in the design/development of the project outputs and the measures in place to promote a mixed team with women and under-represented groups taking an active role in the project implementation.
- **Knowledge Triangle Integration (KTI):** Please describe how your project facilitates collaboration between the knowledge triangle (businesses, research, education) and cities to solve the most pressing mobility challenges.
- **Intellectual Property Rights (IPR) and Exploitation of Results:** Provide a description of the main IP assets, how are they currently or planned to be protected to ensure future commercialisation. Describe how the IP strategy is aligned with the business goals and the planned commercialisation strategy. (Optional) Include an initial Freedom to Operate (FTO) as a supporting document.

Under the **risk management** section, we ask you to outline the risks potentially related to your project. To add a risk, click on the "add new" button.

You will be asked to choose the risk category, as well as the risk likelihood, from a drop-down menu:

Under the financial sustainability section, you will be able to add your preferred financial sustainability mechanism (FSM) for the commercial partner. Please refer to the financial sustainability guidelines published on the Call website to understand the differences between the available options.

To add the FSM for the commercial partner, press **+Add new partner:**

You will be asked to choose the responsible partner, the FSM, as well as to identify the project results which will be commercialised by this commercial partner and a description of the planned FSM. Furthermore, you

will need to provide the turnover, balance sheet total liabilities + shareholder equity of the past two years for the commercial partner:

If there is more than 1 Commercial partner, please add any row as any commercial partner in the consortium.

At the end of the Project Scope tab, you will find the **ethics and security** section.

If there are any ethics and security issues related to your project, please indicate which they are by selecting them from the drop-down menu (multiple selections are possible) and describe each of the categories you have selected:

Before moving to the next tab, remember to **click on the "save" button**.

5. Work Plan

5.1 Work Packages

Under this tab, you are asked to build and define the operational structure of your project. You must therefore divide your planned activities into different **Work Packages (WPs)**. A WP is a component of the project work breakdown. It represents a group of project activities targeting common specific objectives. **You have to create WPs before can add the related deliverables.**

When describing the WPs activities for 2025, you are requested to divide them according to tasks.

The creation of the WPs structure must be done before starting to work on the Budget tab: the WPs will in fact appear in the Budget tab, only after you have created in the WPs in the Work Plan tab. Following this same logic, once you remove a WP in the Work Plan tab, the related WP will disappear also from the Budget tab.
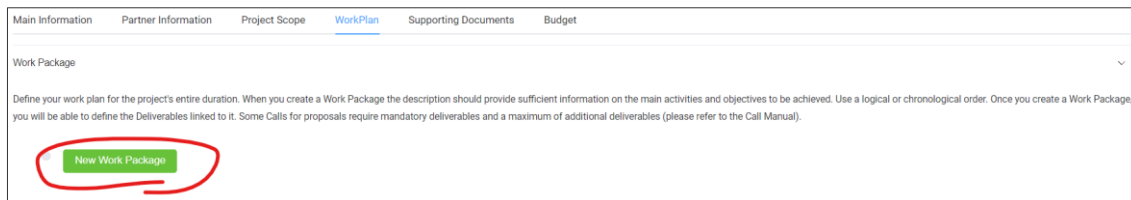
Once you click on "new work package" a new window will appear where you can insert the details of the work package. The WPs will be **automatically numbered** by the system: do not include the WP number in the WP title, and make sure you give them a name that clearly reflects the type of activities covered. Example: Project Management

The start and end date of the WPs cannot be earlier/later than the start (01/01/2025) and end date (31/12/20285) of the overall project.

Remember that the WP leader **must** be included also under the WP contributors. **The WP will in fact be created in the Budget tab, only for the partners that are listed as contributors under that specific WP.**

If you delete a WP, all deliverables linked to it will be deleted too. By deleting a WP the system will automatically re-number the other existing ones (if any).

5.2 Deliverables

Once you save a WP, it will be possible to link deliverables to it. To do so, simply click on "add deliverable" and a pop-up window will open:

The deliverables will be automatically numbered by the system: do not include the deliverable number in the title, and make sure you give them a name that clearly reflects the type of activities covered. *Example: Summary of results Community building 2025.*

If you delete a deliverable, all deliverables linked to it will be deleted too. By deleting a deliverable, the system will automatically re-number the other existing ones (if any).

If your project is approved for funding, you will be asked to justify in a dedicated report the achievement of each deliverables foreseen: make therefore sure you only include meaningful deliverables and that the achievement date you indicate is plausible.

Deliverables capture the achievement of key outputs and may take the form of analysis reports, feasibility studies, strategy documents, pilot action reports, training documentations. The deliverables specified need to fully demonstrate the project's achievements and the judicious use of public funds.

As indicated in the Call Manual, each proposal must include the mandatory deliverables per year to be delivered at specified moments of the project. Find below an example:

Deliverable	Description	Delivery Date
Technical sheet	A technical sheet specifying the functional and technical requirements of the solution. These should be derived from the scope and objectives of the project.	31.01.2025
Product plan	A product plan for each marketed innovation (related to KPI EITHE02.4) to be developed within the project.	31.03.2025
Business plan	If applicable, a business plan for each startup to be created (related to KPI EITHE04.4).	31.03.2025

Demonstration report	A demonstration report covering all demonstrations held during the project implementation (related to KPI KSN02).	31.12.2025
Final dissemination report	A final dissemination report including at least two best practices for the EIT Urban Mobility Marketplace and a short video showcasing the solution developed and the pilots implemented. Specific requirements for the video will be provided to awarded projects.	31.12.2025

5.3 Outputs and milestones

To add outputs and milestones, simply click on the "add new" button: a pop-up window will open and you can insert.

Outputs are tangible results, e.g. the concrete technology, product, service, method, design, patents, new jobs, new curricula, prototypes, concept, methodology, approach, skills and experience, etc. created by the project.

Please include only the outputs referring to the selected KPIs and PFTs (no other outputs should be defined).

Milestones are control points to chart the progress of a project implementation. They may correspond to the completion of a key deliverable that allows the next phase of work to begin.

5.3 Key Performance Indicators (KPIs)

Under the Section KPI you will be able to add the relevant KPIs for your project. Click on +Add New to add the relevant information for the applicable KPI. Please refer to the Call Manual to understand which KPI you have to add:

- **EITHE 02.4 or EITHE 04.4 (minimum expected target: 1)**
- KSN02 **or** KONHE31 **(minimum expected target: 1)**

KPI code	KPI description
EITHE02.4	Marketed innovations (EIT core) [1]

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[1] For the purpose of assessing the achievement of this KPI, entities that are considered affiliated entities of the product owner/startup shall not be considered as customers. Affiliated entities are entities with a (usually legal or capital) link to a beneficiary. 'Link to the beneficiaries' means in particular a legal or capital link. This covers:

- permanent legal structures (e.g. the relationship between an association and its members)
- contractual cooperation (e.g. an existing collaboration agreement for activities in a field relevant to the action;)
- capital link, i.e.

EITHE04.4	Startup created of/for innovation *(EIT core)*
KSN02	Demonstrations/pilots/living labs within a project that actively involve citizens and/or local associations (EIT Urban Mobility specific)
KONHE31	Tested Engineering Innovation

In addition to the mandatory KPIs, proposals are expected to contribute to other KPIs. This **will be positively assessed during the evaluation, in particular contributions to KPI EITHE04.4 Startup created.**

KPI Code	KPI description
EITHE04.4	Startup created of/for innovation *(EIT core)*
EITHE01.1	Intellectual property rights
KSN01	# Innovation pilot scaling

For each KPI added, you will have to select the Code (see available codes above) and add the following information:

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o   direct or indirect control of the beneficiary
o   under the same direct or indirect control as the beneficiary or
o   directly or indirectly controlling the beneficiary.

Moreover, it covers not only the case of parent companies or holdings and their daughter companies or subsidiaries and vice-versa, but also the case of affiliates between themselves (e.g. entities controlled by the same entity).

KPIs

* KPI Code

Select ⌄

KPI Title

KPI Description

* Explanation

* Target Value 2025

Target Value 2026

Target Value 2027

Target Value 2028

* KPI achievement date

📅

* Responsible partner

Select ⌄

* Contributing partner

Select ⌄

Save   Cancel

Before moving to the next tab, remember to **click on the "save" button**.

6. Supporting Documents
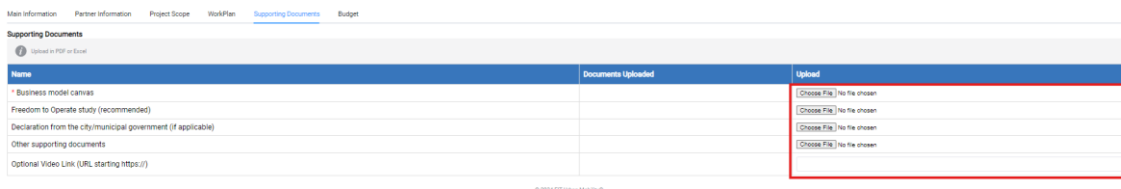
Under this tab, we ask you to upload, as **mandatory documents**, the following documentation:

- Business model canvas (template available on the Call webpage)

In addition you can also add the following optional documents/information:

- Freedom to Operate study (recommended)
- Declaration from the city/municipal government (if applicable) (template available on the Call webpage)
- Other supporting documents
- Optional Video Link (URL starting https://)

Please make sure you use the templates when available.

Before moving to the next tab, remember to **click on the "save" button**, otherwise the upload will not be executed.
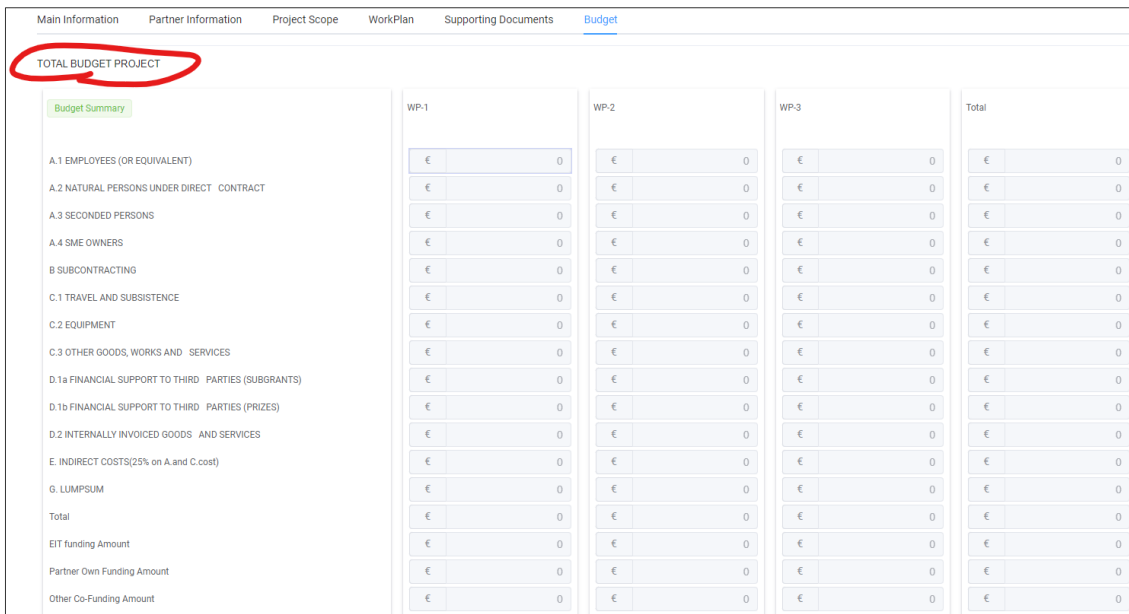
7. Budget

The Budget section is directly linked to the Work Plan tab. The Budget table is structured according to Work Packages (WPs) – and WPs appear in the Budget tab as soon as they are created in the Work Plan tab. This means that, deleting a WP under Work Plan will automatically delete that specific WP under the Budget tab as well.

For this reason, we highly recommend you to fill in the Budget tab only once the Work Plan has been finalised and you don't expect to make any additional changes to the WPs' structure.

At the top of the Budget tab you will find the summary table: this table will be automatically populated as soon as you start to include figures in the budget table of each partner organisation.

By clicking on the title "total budget project" you can hide/unhide this table.

Right under the total budget table, you will find one table per each one of the partners involved into the project. For each of them, only the Work Packages where they have been included as "contributor" will appear.

The budget is divided according to the cost categories foreseen by the **Horizon Europe Programme**. You will be able to fill in all the cells which appear white.

Each time you introduce a cost under a cost category, you must provide a brief explanation of which costs will be covered. Some examples:

- 3.000 Euro under other goods and services "2.000 Euro for the catering and venue of event X; 1.000 Euro for the fee of a professional trainer.

- 5.000 Euro under travel "cost for the trip of two persons for each of the two project's events X and Y".
- 60.000 Euro under employee "10.000 Euro for 0.5 Full Time Employees for the activities linked to Task X of WP X; 50.000 Euro per 3 Full Time Employees for the activities linked to Task X of WP X.

You must also indicate the **percentage of EIT funding** (the part of the costs which will be covered by EIT) and the percentages of potential own and co-fundings.

Own funding will be the costs covered by the partner directly; while **co-funding** will be costs covered by a third party. If any co-funding is foreseen, you must indicate **who is covering** it by selecting the right option/s from the drop-down menu (multiple selection is allowed):

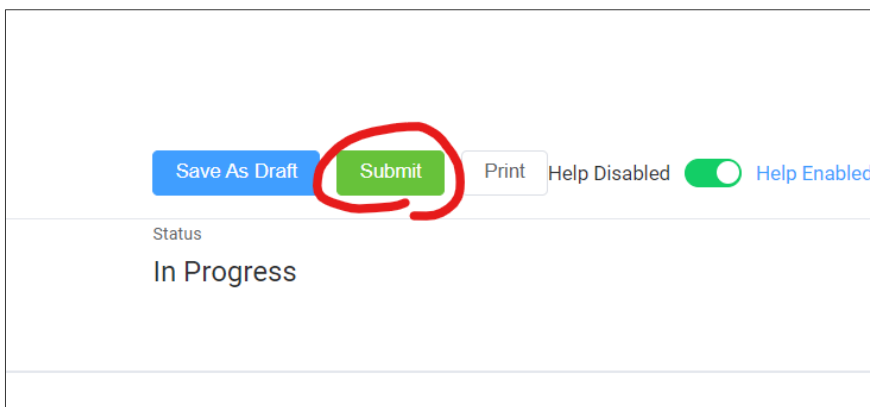You must repeat this process for each partner.

Before moving to the next tab, remember to **click on the "save" button**.

8. Submit Application Form

We strongly recommend all applicants **not to wait the last day/minute to submit the Application Form**.

You should ideally **submit it with at least one day of margin**: should you encounter any system error while submit the AF, EIT Urban Mobility staff will in fact be able to properly assist you.

When your Application Form is correctly and fully completed, **save it one last time** and you can then **submit** it by clicking the "submit" button:


If your Application Form has been not properly completed – i.e. some mandatory information have not been included – the system will not allow you to submit the AF and an error message will inform you about what is missing.

Once an Application Form is submitted it will not be possible to revert the process any longer, nor to submit a new updated version. Make therefore sure that you **submit the AF only once you are sure that the information introduced are final**.
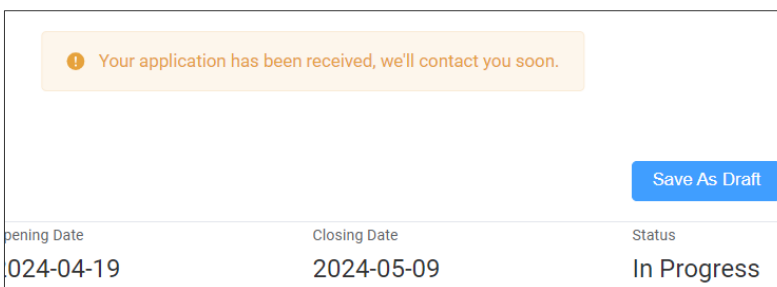
After clicking "submit" a pop-up message will ask you to confirm or cancel your choice:
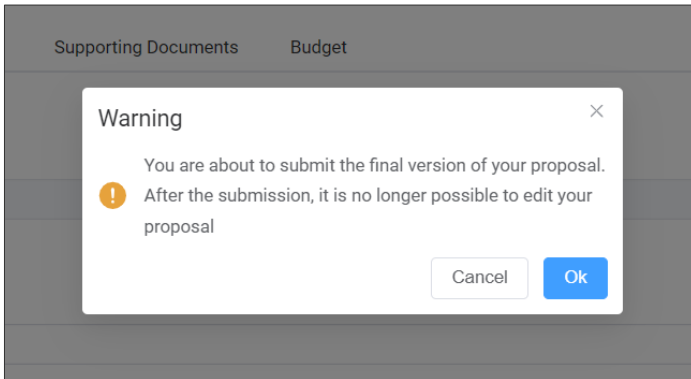
Once you click on OK, the browser will ask you to confirm if you want to leave the page or not: remember to click on "leave".
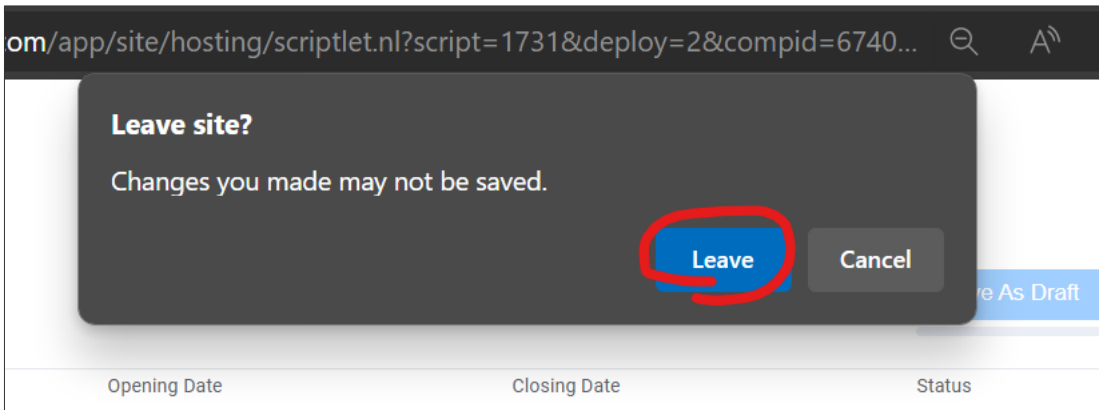
Once your proposal is submitted you will **not** receive any e-mail notification. The following message will however appear and your application will result not be editable any longer.

By going into the section "My applications" you will however be able to see the status of your application and therefore see if it was properly submitted.

9. Tips & Tricks

Please find here below a recap of the **main points of attention** to follow in order to guarantee a smooth application process:

- Start creating and filling in the Application Form **at least 3 or 4 weeks before the submission deadline**: in this way you can familiarise yourself with the Application Form and can **let us know in due time if you are encountering any technical issues** by writing an e-mail to **pmo@eiturbanmobility.eu**.
- **Do not include any external links (URLs)** in the Application Form, unless it's for the optional video link.
- For tabs like the "Project Scope" one: prepare your descriptions in an **offline document using the available application form on the Call website**, and copy and paste the text in the online Application Form only once final.
- If you have **co-editors**, remember that only **one user** at the time should work on the Application Form.
- The **Budget tab** should be one of the **last tabs to be filled in** since the structure is directly linked to the Work Plan structure. The budget will only be available once you created the Work Packages
- When you prepare the **description of the Work Packages** (WP), remember to describe the actions according to **tasks** for 2025(i.e. each WP should have Task 1, 2, 3…).
- **Save often**: in this way you can make sure no information will get lost (if you stop working on the Application Form for some time, the system will log you out automatically without saving).
- **Do not wait the last day/minute to submit the Application Form**: should you encounter any system error while submit the AF, EIT Urban Mobility staff will in fact not be able to properly assist you.