Business Plan 2023–2025
Open Call for Proposals

Competence Hub Open Call – Guidance for Applicants

EIT Urban Mobility - Mobility for more liveable urban spaces

EIT Urban Mobility

Barcelona | 16 December 2024

eiturbanmobility.eu

History of changes

Version	Publication Date	Change
1.0	16.12.2024	Initial version

Contents

1. Register and apply

1.1 PIC and PIF registration

The first step one organisation must take, in order 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**.

The second step is to **get login credentials** for the NetSuite platform:
1. Organizations already registered in the PLAZA platform must contact the EIT UM Service Desk servicedesk@eiturbanmobility.eu.
2. Organizations not previously registered must submit the Partner Information Form (PIF) in order to get their credentials.

All applicants should be able to access the new **EIT UM NetSuite Platform** after setting a new password.

1.2 Search for open calls and apply

Once you land on the **homepage of the portal,** click on menu, call for proposals, open calls:
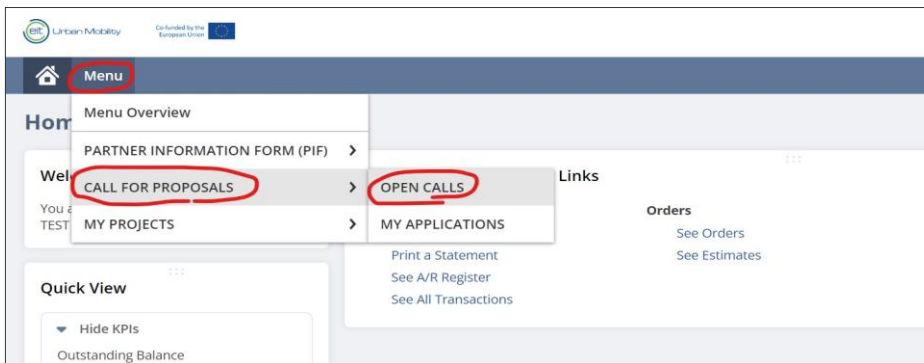
You will see the list of all EIT Urban Mobility calls currently open. Choose the **Competence Hub Open Call (3rd cut-off Open Call)** from the list and click on the "apply" icon:

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 in five different tabs, each containing a set of information.

Once you start working on your AF, we recommend you to **save 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 application" 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.

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 Competence Hub Open Call, the duration of the projects may vary, depending on the type of activities planned (as indicated in the call manual). All projects must finalize by 31 December 2025 at the latest.

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 the your project.

To enter a **self-defined keyword**, click on "new keyword", 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 keyword   Lorem ipsum   11 / 80
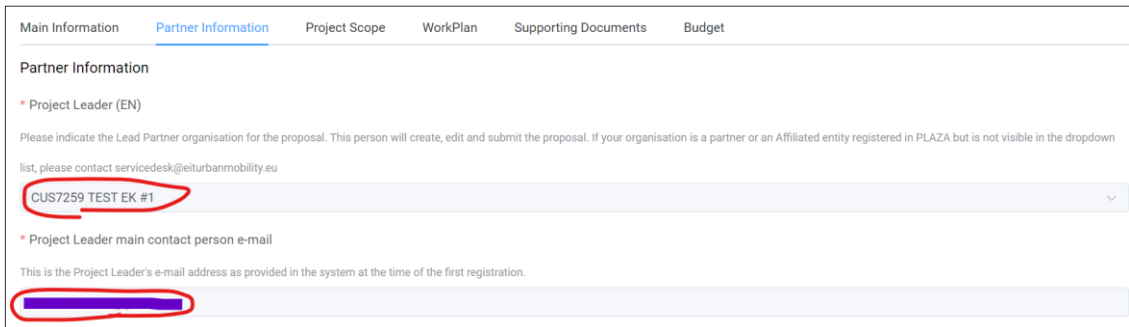
Before moving to the next tab, remember to **click on the "save" button.**

3. Partner Information
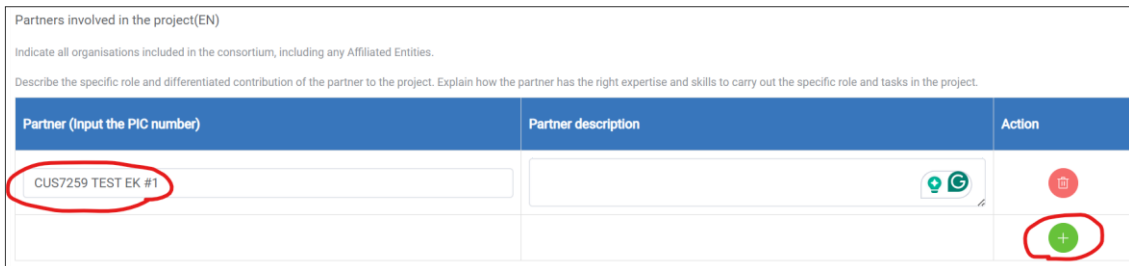
The "**project leader**" is automatically assigned by the system, and it is the organisation of the contact that creates the Application Form.

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.

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

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

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

Partners involved in the project(EN)

Indicate all organisations included in the consortium, including any Affiliated Entities.

Describe the specific role and differentiated contribution of the partner to the project. Explain how the partner has the right expertise and skills to carry out the specific role and tasks in the project.

Partner (Input the PIC number)	Partner description	Action
CUS7259 TEST EK #1	tempor incididunt ut labore et dolore magna aliqua. Ut enim ad minim veniam, quis nostrud exercitation ullamco laboris nisi ut aliquip ex ea commodo consequat. Duis aute irure dolor in reprehenderit in voluptate	🗑
987654300		🗑
CUS7260 TEST Isabell #1		➕

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

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.*

* Existence of direct links between participants in the current proposal

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

No ⬤ Yes

* Description of participants with direct link

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Under this section 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 contact person of an organization already registered in the system.

We suggest to grant 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 will do the final submission of the proposal.

If you click on the "+" button to add a contact but then 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 finalized. 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:

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

* Project main objectives (max 2000 characters)

Please describe in a concise form what the project intends to do and how it will lead to concrete outcomes and results. Make sure your objectives are SMART - Specific, Measurable, Achievable, Realistic and Time Bound.

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* Scope of the activity and impact (max 4000 characters)

State what activity type the proposal targets (see Section 3.4 of the Call Manual, i.e. one of CH1 to CH5 - CHOOSE ONLY ONE ACTIVITY TYPE) and explain how your proposal aligns with the scope of the topic selected. State the potential learning impact on the target audiences as well as any wider social, environmental and economic benefits generated by the successful delivery of your project. These benefits should include the impact that the training will have on cities, business ecosystems, participants, end-users and the wider community. Impact is any change, benefit or value resulting from the project over both short and long term.

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

Strategic fit:
- Describe how the proposal contributes to the EIT Urban Mobility Strategic Objectives emphasized in section 3.1 of the Call Manual (max. 7500 characters)
- State the potential impact of the project proposal in line with or exceeding the specific requirement stated for the respective type of activity (section 3.5 of the Call Manual) (max. 7500 characters)

Excellence and novelty:
- Describe previous experience and expertise in successfully developing, delivering and/or commercializing similar products or services for an audience of professionals. (max. 7500 characters)
- Describe previous experience and expertise in successfully developing, delivering and/or commercializing similar products or services in the area of urban mobility, sustainable cities, innovation and/or governance. (max. 7500 characters)

- Describe previous involvement in successfully delivering similar products and services within collaboration frameworks similar to the ones provided by EIT Urban Mobility (e.g. HE calls, calls from other entities such as World Bank, UNESCO, etc.). (max. 7500 characters)
- Elaborate on how the proposal builds upon/on existing courses or addresses new topics/subjects/regions, different from the ones already covered by the Competence Hub portfolio and/or is being innovative with respect to the existing state of the art of similar courses on similar topics? (max. 7500 characters)

Impact:
- For CHA2, CHA4, CHA5 (if the course is revenue generating) and CHA1 (if e-courses are to be hosted on a platform other than UMX), elaborate on the potential of the courses or activities in the proposal to reach their revenue goals and describe a clear commercialisation/promotion and/or exploitation strategy.
  For CHA1 (if e-courses are to be hosted on UMX), CHA3 and CHA5 (if the course is not revenue generating) elaborate on the potential of the courses or activities in the proposal to reach a high number of urban mobility professionals and describe a clear dissemination and communication plan. (max. 7500 characters)
- Describe the measures to ensure the course(s) has (have) the market potential to be repeated or scaled up to a different market. (max. 7500 characters)

Implementation:
- Describe how you intend to involve EIT UM Competence Hub in the different steps of the course design, delivery and, when relevant, commercialisation. (max. 7500 characters)

You will then be asked to briefly outline your **communication and dissemination plan**, how you will **gender and diversity** in your project actions, how your project will **integrate education, innovation and business creation**, provide a description of the main **IP assets** (to the extent that is applicable to your project) and to present your **project management structure and procedures**.

Communication and Dissemination Plan

* Communication and Dissemination Plan/Strategy (max 1000 characters)

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.

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Gender and diversity

* Gender and diversity dimension (max 1000 characters)

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.

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Knowledge Triangle Indicator (KTI)

* KTI Integration: how your project integrates education, innovation, business creation (max 1000 characters)

Please describe how your project will integrate innovation, education and business creation aspects within its remit. For example, from an innovation activity, propose a spin-out from the project linking to business creation activities, etc.NB. For Innovation call only: the integration of education aspect is not mandatory.

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Intellectual Property Rights (IPR)

* 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.

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* Project Management Structures and Procedures

Please explain how you will manage the project to ensure effective and professional delivery of the project outcomes.

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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.

Risk Management and Contingency Plan
Please identify relevant risks and describe adequate mitigation measures.

Risk Category	Title	Risk Likelihood	Risk Impact	Description	Mitigation	Action
						+ Add New

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

The **Financial Sustainability Mechanism (FSM)** recommended for the Competence Hub Open Call is "revenue sharing". To fill in this section, click on "add new" and provide a description of the FSM, the responsible partner, the revenue type and the target value expected to be achieved (amount in EUR).

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 indicated which they are by selecting them from the drop-down menu (multiple selection is possible) and provide a description for each of the categories you have selected:

1. Human Embryonic Stem Cells and Human Embryos
2. Humans
3. Human cells/tissues (not covered by element 1)
4. Personal data
5. Animals
6. Non-EU countries
7. Environment & Health and Safety
8. Artificial Intelligence

Select

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)**. To each WP you can add the related deliverables.

We highly recommend to limit the number of WPs (to maximum of 3 to 5) to the ones strictly needed to group the various phases and main type of actions of your project. When describing the WPs activities, 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.
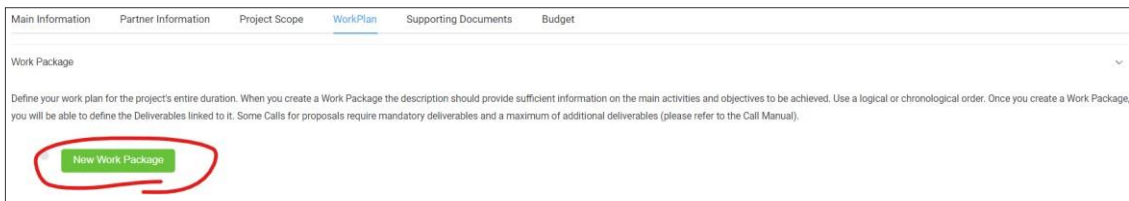
Once you click on "new work package" a new window will appear where you can insert the details of the work package. The WPs will be **automatically numbered** by the system: do not include the WP number in the WP title, and make sure you give them a name that clearly reflects the type of activities covered.

The start and end date of the WPs must be consistent with the start and end date 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

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.

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.

If you delete a WP, 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).

Make sure that the achievement date of the deliverable is consistent with the end date of the WP and with the end date of the project.

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.

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.

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)

Depending on the type of project proposed (CHA1 / CHA2 / CHA3 / CHA4 / CHA5), mandatory KPIs and targets may differ. Please, refer to the Call Manual to know which mandatory KPIs apply to your proposal.

In the Application Form, you will have to click on the "edit" icon, select the KPIs applicable to your proposal and include the missing information.

Keep in mind that it is mandatory to indicate a KPI target for 2025. For the year 2026 onwards, please indicate a target value only if applicable.

KPIs

* KPI Code

EITHE07.1 Graduates from EIT labelled MSc and PhD programmes   ⌄

KPI Title

Graduates from EIT labelled MSc and PhD programmes

KPI Description

Sum of graduates from EIT labelled master's, PhD programmes and other education activities awarded EIT
Label (in year N). --> TEMPLATE

* 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 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** <u>only once the Work Plan has been finalized</u> and you don't expect to make any additional changes to the WPs' structure.

At the top pf 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 organization.

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.

BUDGET PARTNER: CUS7259 TEST EK #1	WP-1		WP-2		Total		Description
A.1 EMPLOYEES (OR EQUIVALENT)	€	10000	€	50000	€	60000	Lorem ipsum dolor sit amet.
A.2 NATURAL PERSONS UNDER DIRECT CONTRACT	€		€	5000	€	5000	Lorem ipsum dolor sit amet.
A.3 SECONDED PERSONS	€		€		€	0	
A.4 SME OWNERS	€		€		€	0	
B SUBCONTRACTING	€	10000	€		€	10000	Lorem ipsum dolor sit amet.
C.1 TRAVEL AND SUBSISTENCE	€		€		€	0	
C.2 EQUIPMENT	€		€		€	0	
C.3 OTHER GOODS, WORKS AND SERVICES	€		€	3000	€	3000	Lorem ipsum dolor sit amet.
D.1a FINANCIAL SUPPORT TO THIRD PARTIES (SUBGRANTS)	€		€		€	0	
D.1b FINANCIAL SUPPORT TO THIRD PARTIES (PRIZES)	€		€		€		
D.2 INTERNALLY INVOICED GOODS AND SERVICES	€		€		€	0	
E. INDIRECT COSTS (25% on A.and C.cost categories)	€	2500	€	14500	€	17000	
G. LUMPSUM	€		€		€	0	
Total Cost	€	22500	€	72500	€	95000	
EIT funding (%)					%	75	
Partner Own Funding Rate(%)					%	25	
Other Co-Funding Rate - National and Regional					%		
Other Co-Funding - EU non-EIT Rate					%		
Other Co-Funding - Other Rate					%		
Other Co-funding Rate - Private					%		
EIT Funding Amount					€	71250	
Partner Own Funding Amount					€	23750	
Other Co-funding Amount - Private					€	0	
Other Co-Funding Amount - National and Regional					€	0	
Other Co-Funding - EU non-EIT Amount					€	0	
Other Co-Funding - Other Amount					€	0	
Type of Co-funding					Select		

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-fundings** will be costs covered by a third party (national and regional funds, EU non-EIT funds or other private funding). You must repeat this process for each partner.

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

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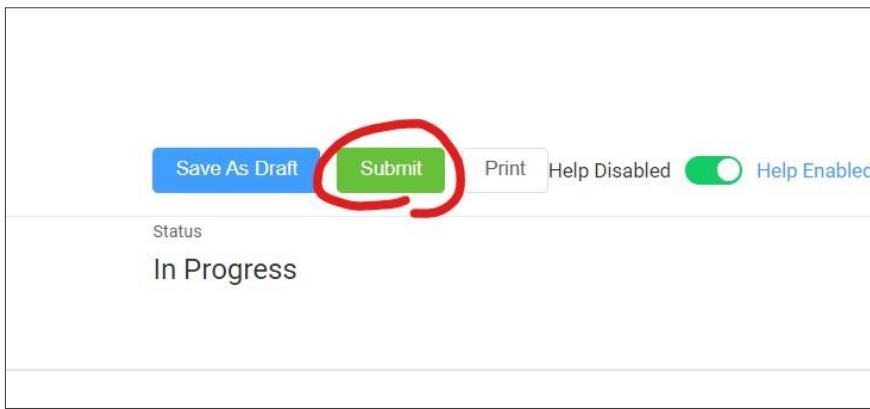
If your Application Form has been not properly completed – ie. some mandatory information have not been included – the system will not allow you to submit the AF and an error message will inform you about what is missing.

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:
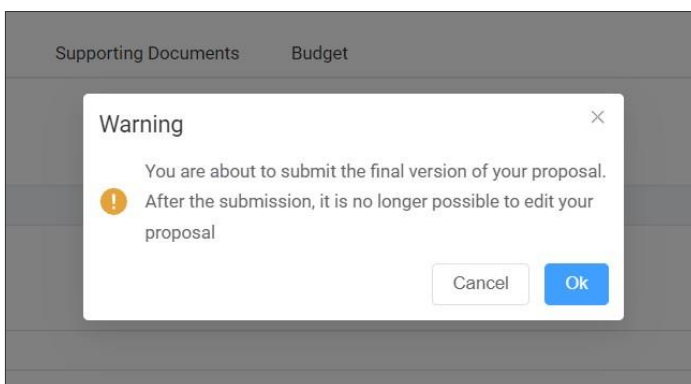
Once you click on OK, the browser will ask you to confirm if you want to leave the page or not: remember to click on "leave".
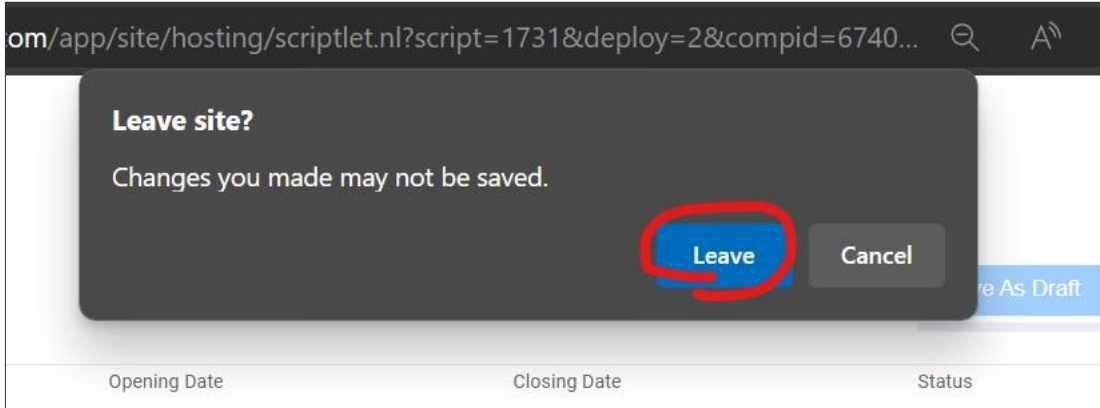
Once your proposal is submitted you will **not** receive any e-mail notification. The following message will however appear and your application will result not editable any longer.
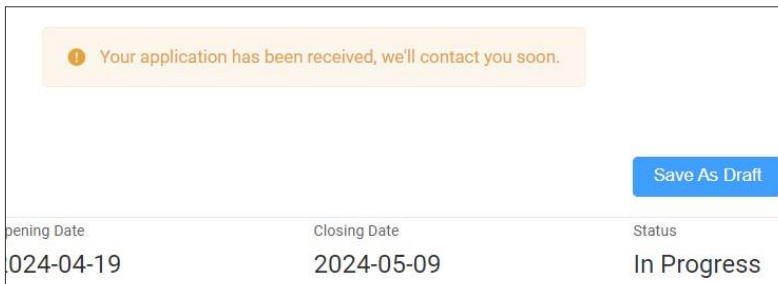
By going into the section "my applications" you will however be able to see the status of your application and therefore see if it was properly submitted.

8 Tips & Tricks

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

- Register your entity as soon as possible and try out the new submission platform well in advance. Contact **servicedesk@eiturbanmobility.eu** in case you encounter any technical issues related to your registration

- Start creating and filling in the Application **Form at least 3 or 4 weeks before the submission deadline**: in this way you can familiarize yourself with the Application Form and **can let us know in due time if you are encountering any technical issue** by writing an e-mail to pmo@eiturbanmobility.eu.

- **Do not include any external links (URLs)** in the Application Form.

- 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 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.

- When you prepare the **description of the Work Packages** (WP), remember to describe the actions according to **tasks** (ie. 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.