



EIT RawMaterials

Education Project Proposal

FINAL DRAFT

Guidance and Template for complementary Information

March 2022

Two new text boxes, ‘Alignment with the strategy of EIT RawMaterials’ and ‘Market analysis’, have been created in SeedBook to address relevant aspects of the proposal. **Please note that the ‘Market analysis’ section in SeedBook is mandatory for Lifelong Learning Education proposals. It is optional for PhD summer/winter schools.** Although consortia are free to structure their proposals in the most suitable way, these two text boxes should be used to cover strategy and market analysis-related matters, and repetitions in other sections of the proposal should be avoided as much as possible. The whole proposal will be evaluated by all external and internal evaluators. Note that each of these boxes has a character limit (10000 and 12000, respectively).

In addition, the following conditions will apply to all projects commencing in 2023 and will be assessed in the proposal evaluation. All new proposals must address explicitly each of the points listed below in the ‘Alignment with the strategy of EIT RawMaterials’ section in SeedBook or in the ‘Market analysis’ section, as appropriate (see below). To facilitate evaluation and proposal selection, it is recommended that each point be addressed under a separate heading, and that the information provided is as quantitative and as precise as possible.

Points to be addressed in the ‘Alignment with the strategy of EIT RawMaterials’ section in SeedBook, with each point addressed under a separate heading:

Education Project Proposal Guidance and Template for complementary information – KAVA 10

1

History of changes		
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1. **Strategy.** *The consortium must explain how the project is aligned with the overall strategy of EIT RawMaterials as outlined in our Strategic Agenda 2022-27*
2. **Continuation plan and financial sustainability.** *The consortium must explain how the project will continue after the funding period, and for Lifelong proposals how it will contribute to the financial sustainability of the KIC. Indeed for projects that will generate a backflow for the KIC (this is mandatory for Lifelong Learning proposals, but optional for PhD Summer/winter school proposals), the consortium must state which backflow mechanism will be implemented and provide a summary (including expected value (in €), timeline and mechanisms).*
3. **EIT Core KPIs.** *The proposal must address core KPIs. Please provide here a brief summary of core KPIs to be achieved (list KPI codes, numbers and timeline). Although this is not an eligibility criterion, the achievement of core KPIs is a fundamental milestone of our strategy. Therefore, proposals that do not address core KPIs are, by definition, misaligned with the KIC's strategic goals.*

*Points to be addressed in the ‘Market analysis’ section in SeedBook (**this is mandatory for Lifelong Learning proposals**), with each point addressed under a separate heading:*

1. **Market analysis.** *Preliminary, but convincing, market analysis, covering important aspects such as the business environment (e.g., technical, political aspects, user needs and targeted applications, customer value proposition, target market(s) (e.g., size, structure, growth potential, segmentation), risk assessment, design or market studies, and intellectual property exploration. The consortium must be able to convince the external reviewers that it is conscious of the market conditions relevant to its learning programme, and that the KAVA will result in the commercialization of its proposed learning programme. Graphs and figures related to market analysis can be uploaded in the ‘Drawings and Schemes’ section.*
2. **IP.** *A clear statement on who (which entity/ies) will own the results of activities undertaken in the KAVA.*
3. **Products.** *A clear statement on which products and/or services will be brought to the market, how, by whom (which entity/ies) and by when.*

Please note that the ‘Market analysis’ section in SeedBook is mandatory for Upscaling, RIS Acceleration and Lifelong Learning proposals. It is optional for other categories of projects.

The mechanism selected for the KIC’s financial sustainability must be outlined in the proposal to a sufficient level of detail that will allow a proper assessment of the project’s financial risks and benefits for

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2

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*the KIC. If the project is recommended for funding, the details of the backflow mechanisms (amount, caps, timeline, responsible party/ies, conditions, etc.) must be fully defined and agreed upon **in writing** by both parties before the project is included in the 2023-2025 Business Plan.*

KPIs, especially EIT Core KPIs, must be selected very carefully because the nature and amount of core KPIs will be one of the three fundamental factors in the proposal evaluation and selection, together with financial sustainability of the KIC and integration of the knowledge triangle. As a rule, the consortium's underperformance in yearly EIT Core KPIs will result in a significant EIT-funding reduction and/or project termination. Consortia must aim to distribute core KPIs over the duration of the project, and not concentrate them at the end of the project or after the end of the funding period.

NOTE on co-funding contribution: Any co-funding contributed by the Education project consortium will be evaluated positively. For example, if the project needs € 150 000, 90% can be covered using EIT funding (€ 135 000) and 10% can be covered by partner co-funding (€ 15 000).

Please note that the guidance showed below refers to the final submission. For guidance on the DRAFT submission, please refer to the Call text document

1. PROJECT TITLE

Check with Innovation Hub staff that the project name is not the same as or similar to the name of any other projects.

2. EXECUTIVE SUMMARY (**max. 90 words- 500 characters**)

The executive summary should be a clear and concise description of the project's key elements: "What, Why and How". This text may be used as part of the Business Plan, or for presentations and other materials, and should therefore be formulated as a business pitch.

3. POPULAR PROJECT DESCRIPTION (**% page-1500 characters**)

Describe the project as it could be communicated to an external stakeholder and to the intended learners. This information will be uploaded in the EIT RawMaterials website.

4. PROJECT DESCRIPTION

4.1 Background of the project (**max. 1 page- 3000 characters**)

Explain where the idea for developing the programme/module/course originates from and why the resulting education is important for the KIC and the RM sector (e.g., a particular raw materials challenge; complement to an existing KAVA project or non-KIC project, etc.). Refer to the KAVA9 Education Call Text for further description of the requirements.

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4.2 Project objective and scope (*½ page- 1500 characters*)

Explain what the project intends to achieve, its objectives and scope. This should ideally include a clear and specific description and justification of the education content, learning goals and pedagogic approach. Explain and justify the roles and responsibilities of all project partners, especially for partners who do not provide co-funding. Include a plan of action for the event that a partner unexpectedly withdraws from the project.

Explain how the project will complement existing initiatives, and how it will contribute to the achievement of the EIT Core and KIC-specific KPIs. Specify the geographical coverage, both from an offering side (where will the product/service be offered) and from an end-customer side (who will be able to benefit from it). Addressing the so-called RIS regions is encouraged.

4.3 Alignment with the strategy of EIT RawMaterials (*max. 3 pages- 9000 characters*)

Please check the ‘Preamble’. This section is mandatory for all types of projects. The following information should be provided, with each point addressed under a separate heading:

1. **Strategy.** *The consortium must explain how the project is aligned with the overall strategy of EIT RawMaterials as outlined in our Strategic Agenda 2021-27 .*
2. **Financial sustainability.** *The consortium must explain how the project will contribute to the financial sustainability of the KIC. For projects that will generate a backflow for the KIC (this is mandatory for Lifelong Learning proposals, but optional for PhD winter/summer schools proposals), the consortium must state which backflow mechanism will be implemented and provide a summary (including expected value (in €), timeline and mechanisms).*
3. **EIT Core KPIs.** *The proposal must address core KPIs. Please provide here a brief summary of core KPIs to be achieved (list KPI codes, numbers and timeline). Although this is not an eligibility criterion, the achievement of core KPIs is a fundamental milestone of our strategy. Therefore, proposals that do not address core KPIs are, by definition, misaligned with the KIC’s strategic goals.*

4.4 Market analysis (*max. 4 pages-12000 pages*)

*Please check the ‘Preamble’. **This section is mandatory only for Lifelong Learning Education projects.** The following information should be provided, with each point addressed under a separate heading:*

1. **Market analysis.** *Preliminary, but convincing, market analysis. Graphs and figures related to market analysis can be uploaded in the ‘Drawings and Schemes’ section.*

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2. **IP.** There must be a clear statement on who (which entity/ies) will own the results of activities undertaken in the KAVA.
3. **Products.** The proposal must clearly state which products and/or services will be brought to the market, how, by whom (which entity/ies) and by when.

4.5 Needs and impact (**1 page-3000 characters**)

Explain who the target learners and/or key beneficiaries of the educational activity are. Explain how the project will reach this audience (recruitment) and any changes in perspective you anticipate in this audience. Explain the strategic importance for the KIC of meeting the identified needs (e.g., how will the education project provide opportunities for students to develop business ideas and set up a start-up).

Explain any possible indirect benefits for the KIC (e.g., impact of developing project members' pedagogic competencies on other educational initiatives, de-siloing, building-up the community, leveraging effect on other KAVAs, etc.).

Explain how project results are connected/related to the expected impacts (effectiveness of dissemination plan, involvement of stakeholders, etc.). Quantifying the market potential will particularly add value to the proposal's intended impact and is mandatory for lifelong learning (please see also additional information in the KAVA Call Text).

4.6 Expected financial sustainability (**½ page-1500 characters**)

For Lifelong Learning Proposals:

Lifelong Learning proposals must charge course fees which must be shared with the KIC. An agreement on the revenue must be reached with the KIC LEs before the project agreement is signed, specifically with the relevant CLC Director and the Education & Innovation Director.

For PhD winter/summer schools Proposals:

Explain what potential funding sources (own revenues, public funding, co-funding by partners, etc.) could be considered to finance (at least partially) the continuation of the service offering after the end of the project period.

A structured financial strategy roadmap with follow-up actions and recommendations for continuation will be considered an especially valuable component of the proposal.

5. PROJECT IMPLEMENTATION PLAN

This section must include, under 'Work Plan (first year)' and 'Work Plan (subsequent years)' a clear description of the consortium, work plans, risk analysis, IP management and budget.

5.1 Consortium

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Describe the role of each partner in the consortium, as well as identify the commercialization or implementation partner(s) in case of Lifelong learning proposals. If the project does not involve an industry partner, it will be particularly important to provide evidence of how the project addresses a concrete industry need.

The KIC aims to expand the reach of its community. Therefore, consortia involving partners from the ESEE/RIS regions will be given priority. It is recommended that PhD winter/summer schools education proposals include minimum one RIS university.

5.2 and 5.3 Work plan (first year and subsequent years)

It is required that the proposal includes a detailed, structured, step-by-step project plan broken down into design and implementation phases, with the rationale behind each step explained. A detailed description of partners' roles in each work package and task should be included to add clarity to the project implementation description.

In addition, please provide the milestones and deliverables for each work package. Explain briefly, not only defining the aims, objectives and deliverables, and how these deliverables will help achieve the project aims and objectives. When project deliverables are course plans, such course plans shall be Bologna compliant.

For Lifelong Learning proposals, a go-to-market strategy must be included in the proposal as Work Package 0 (WPO). Relevant feasibility aspects identified in the proposal must be assessed in WPO.

All other projects, including Lifelong Learning Proposals, shall include a Work Package (WP) dedicated to project management and one WP dedicated to communication and dissemination (including interactions/reporting to the KIC and the EIT, etc.). Please refer to the document 'EIT RawMaterials communication and dissemination guidance' for further advice. All publicity materials and platforms must comply with the EIT Branding Guidelines available in the InfoCenter (infocenter.eitrawmaterials.eu – check 'Guidance for Partners' – 'Files' – 'Communications and Branding').

5.4 Risk analysis (*½ page*)

Identify key risk factors (with regards to technology, market, finance, regulatory, stakeholders, management etc.), their likelihood (low/medium/high), criticality and describe planned anticipation/mitigation measures. Definition of critical risk: a critical risk is a plausible event or issue that could have a high adverse impact on the ability of the project to achieve its objectives.

Level of likelihood to occur: low/medium/high.

The likelihood is the estimated probability that the risk will materialise even after taking account of the mitigating measures put in place.

5.5 Management of IP issues (*max. ½ page*)

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Please note that the full set of teaching material (with editable master files) must be shared with the KIC. If relevant, explain the basic principles to manage IP issues among partners.

5.6 Budget **(1 page)**

Please provide justification of the budget allocations and demonstrate their link to the elements of the proposed project, i.e., distribution between partners, FTE, education and dissemination measures, etc.

It is preferable that the bulk of the funding should not be used for management costs or indirect costs such as travel expenses, but for the direct development and delivery of the education programme.

It is crucial to explain and justify the budget plan in detail. Consistency between the budget plan and the project activities is an important evaluation criterion (see Sections 2.4 and 2.5 of the KAVA Call texts – Evaluation grid).

If the project builds on and overlaps with a currently running KAVA project, EIT RawMaterials may advise the consortium that the budgets be merged in the event that the proposal is successful. Please take this into account and ensure that there are no duplications in budget where there are overlaps, as projects cannot receive double funding in the same business plan year.

6. FINANCIAL BACKFLOW TO EIT RAWMATERIALS

This section is mandatory only for Lifelong Learning Education projects. Financial backflow to the KIC from any type of project, however, will be evaluated positively as it is a key element of the KIC's Strategic Agenda. Please provide a brief summary of the total expected financial backflow to the KIC that will be generated by this project in the 'Returns [€]' box. Please enter the amount in €. A summary of the mechanisms, timeline, selected 'Financial sustainability mechanism should be reported in the 'Explanation' box. For Lifelong Learning projects, this section should be a summary of (and must be consistent with) the information provided in the 'Alignment with the strategy of EIT RawMaterials' section.

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