Call for Evaluators

The EIT Higher Education Institutions (HEI) Initiative – Selection framework for Standard Evaluators and Rapporteurs.

EIT Higher Education Institution (HEI) Initiative
Coordinated by KIC EIT RawMaterials

EIT RawMaterials GmbH ("Contracting Authority" or "CA")

Berlin | 15 October 2024

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EIT HEI Initiative

Innovation Capacity Building
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1. Introduction to the EIT Higher Education Institutions (HEI) Initiative

The EIT Strategic Innovation Agenda (SIA) 2021-2027[1] sets the strategic direction, priorities and objectives of the European Institute of Innovation and Technology (EIT) and its Knowledge and Innovation Communities (EIT KICs).

Under this EIT SIA 2021-2027, the EIT and the EIT KICs will raise the bar and create systemic impact in higher education by strengthening innovation ecosystems. This will be achieved through the following:

- Increasing the entrepreneurial and innovation capacity of higher education institutions across Europe by promoting and supporting institutional change in higher education institutions.
- Strengthening the integration and contribution of higher education institutions to innovation ecosystems.

To realise these ambitions, the EIT and EIT KICs established the *EIT Higher Education Institutions (HEI) Initiative[2]* (hereinafter referred to as the "EIT HEI Initiative").

The EIT HEI Initiative plays a crucial role in driving economic and societal transformation. In line with the EIT SIA, it focuses on building innovation and entrepreneurship capacity at the institutional level and fostering the strategic integration of higher education into the wider innovation ecosystem by equipping HEIs with essential knowledge, tools and networks. Its Calls for Proposals incorporate the EIT Knowledge Triangle Model[3] which brings together partners from education, research, and business to collaborate on innovation action plans. This approach fosters systemic change by enabling the co-creation of knowledge and impactful solutions to global challenges, both within individual projects and across the broader portfolio. Central to the EIT HEI Initiative is its commitment to building a dynamic, inclusive community of HEIs and non-HEIs to enhance the role of European higher education in the innovation ecosystem, promoting a more innovative and competitive Europe.

EIT HEI Initiative Strategic Objectives:

- Innovations to Market: The EIT HEI Initiative enhances institutional innovation and entrepreneurship capacity by facilitating the transition of academic innovations into market-ready solutions, thereby attracting investments, and nurturing startup creation and support.
- European Higher Education Competitiveness: The EIT HEI Initiative strengthens European HEIs' competitiveness by transforming them into engines of innovation and entrepreneurship, attracting

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[1] Decision (EU) No 2021/820 of the European Parliament and of the Council of 20 May 2021 on the Strategic Agenda of the European Institute of Innovation and Technology (EIT) 2021-2027: Boosting the Innovation Talent and Capacity of Europe and repealing Decision No 1312/2013/EU, OJ L 189/3 of 28 May 2021, https://eur-lex.europa.eu/legal-content/EN/TXT/PDF/?uri=CELEX:32021D0820&from=EN

[2] The name of the EIT HEI Initiative may change in 2025 and will be in place for the Call for Proposals 2024 cohort start date. Successful proposals will be provided information about this at the stage of the communication of the application result. The name change will not affect the contents of the IVAP in any way.

[3] The Knowledge Triangle comes from the EIT Innovation Model. It refers to the interaction between business, education and innovation, which are key drivers of a knowledge-based society.

top talent, and forming strategic partnerships to maintain Europe's leadership in education and strengthen its role in global innovation.

- Employability through Skills and Competencies Development: The EIT HEI Initiative support HEIs to ensure graduates are equipped with advanced skills and competencies vital for thriving in tomorrow's job market and catalysing innovation in their professional paths.
- Dynamic and Inclusive Innovation Community: The EIT HEI Initiative unites European HEIs, businesses, investors, and other key stakeholders to collaboratively address complex challenges, fostering a diverse and inclusive community. The knowledge transfer and co-creation that occurs across this community leads to the further amplification of individual project success, impact and outreach, leading to the creation of impact at the community level.

HEIs selected for the EIT HEI Initiative utilise the Knowledge Triangle Model to drive systemic and institutional change. They also engage with Smart Specialisation Strategies[4] and align with the EIT Regional Innovation Scheme (EIT RIS)[5] goals. This involvement enhances connections between HEIs and their local and regional ecosystems and helps secure additional funding beyond the project's initial period. The initiative promotes collaboration between EIT KIC partners and non-partners to tap into existing innovation and entrepreneurial expertise and encourages the exploration of opportunities within the broader EIT Community to maximize project impact and strengthen ties with the EIT ecosystem.

The initial pilot phase of the EIT HEI Initiative, which ran from 1st July 2021 to 30th 31st July 2024, achieved significant milestones: 65 projects involving 359 HEIs and over 380 non-academic organizations from 42 countries, trained more than 40,000 participants, and supported over 1,100 startups and scaleups. Following an independent evaluation, the EIT Governing Board has decided to extend the Initiative through the remainder of Horizon Europe (2024-2027)[6].

2. General requirements of the EIT HEI Initiative's Call for Proposals 2024

The Call for Proposals 2024 aims to further enhance the quality and competitiveness of European higher education by funding innovation capacity building projects that will bring about institutional and systemic change. It offers applying consortia the opportunity to shape their own pathway to innovation by selecting activities that address their specific capacity building needs. Selected projects will implement funded actions that, among others, will strengthen staff capacity, establish innovation structures, support technology transfer and business creation activities and foster collaboration between HEIs and business partners across Europe through the establishment of strategic partnerships.

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[4] https://s3platform.jrc.ec.europa.eu
[5] https://eit.europa.eu/activities/eit-regional-innovation-scheme-ris-closing-innovation-divide-europe
[6] https://eit.europa.eu/sites/default/files/2024-04/GB_Decision_14-2024_FA%20HEI%20continuation%20in%202024-2025_web.pdf

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This call especially invites organisations that have not previously participated in an EIT HEI Initiative selected project to apply and requires greater representation and engagement of business partners. By expanding and diversifying the EIT HEI Initiative consortia to include a stronger presence of the business side of the knowledge triangle, this call will enhance integration and improve knowledge exchange.

Additionally, former EIT HEI Initiative partners are invited to participate in the call, with a demonstrable added value for the scope and objectives of the project and with a specific role (and set of responsibilities) that utilises their innovation and entrepreneurship expertise developed during their previous EIT HEI Initiative project and their previous experience with the EIT ecosystem.

Furthermore, the call will actively encourage proposals to align with other activities within the EIT ecosystem, such as EIT Community[7] initiatives (Cross-KIC), as well as find synergies with EU initiatives relevant to the objectives of the EIT HEI Initiative.

The EIT HEI Initiative Call for Proposals 2024 will incorporate a two-strand approach in which applicants will need to select one of the two strands:

Strand A: Innovation and entrepreneurship capacity building at HEIs.
Strand B: Innovation and entrepreneurship capacity building at HEIs for the enhancement of Deep Tech.

Both strands will follow the same structure, budget, and requirements. However, Strand B proposals must detail how their action plans will enhance deep tech innovation and entrepreneurship within their consortia and align with the EIT Deep Tech Talent Initiative.

The following EIT KICs[8] may participate in the implementation of the EIT HEI Initiative*[9]:

- EIT RawMaterials (coordinating EIT KIC)[10]
- EIT Climate-KIC[11]
- EIT Digital[12]
- EIT InnoEnergy[13]
- EIT Food[14]
- EIT Health[15]
- EIT Manufacturing[16]
- EIT Urban Mobility[17]

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[7] https://eit.europa.eu/community-activities
[8] KICs under Partnership Agreement and KICs under Memorandum of Cooperation.
[9] EIT KICs are not eligible to participate as a partner organisation in an application to the Call for Proposals.
[10] https://eitrawmaterials.eu/
[11] https://www.climate-kic.org/
[12] https://www.eitdigital.eu/
[13] https://www.innoenergy.com/
[14] https://www.eitfood.eu/
[15] https://eithealth.eu/
[16] https://www.eitmanufacturing.eu/
[17] https://www.eiturbanmobility.eu/

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- EIT Culture & Creativity[18]

This call will fund projects which will have a total duration of 25 months and a total budget of 1.34 million EUR to implement their activities. There will be two implementation phases, namely:

Phase 1:   1 April 2025 – 31 December 2025 (9 months, 540,000 EUR)
Phase 2:   1 January 2026 – 30 April 2027 (16 months, 800,000 EUR)

For the purposes of activities, KPIs and budget planning only, Phase 2 is broken down into two parts over the two calendar years it encompasses, as follows:

Phase 2a: 1 January 2026 – 31 December 2026 (12 months)
Phase 2b: 1 January 2027 – 30 April 2027 (4 months)

However, the proposals will be required to set out a longer-term impact vision for institutional and systemic change up to the year 2030. Throughout this five-year period (2025 – 2030), meaning both during the funding period and beyond, the projects will participate in a series of project review activities based on the EIT HEI Initiative Monitoring, Learning and Evaluation Framework[19]. These review processes will support the continuous improvement and scaling up of activities throughout the project lifecycle.

3. Evaluator Pool

Submitting an application does not guarantee that you will be selected for assignment. However, you will be entered into the Evaluator pool. The application will be valid for three years.

The first assignment for which evaluators will be selected is the evaluation of the proposals from EIT HEI Call for Proposals 2024. The details of this assignment form the basis of this Call Text, although additional evaluators may be selected for later assignments if needed.
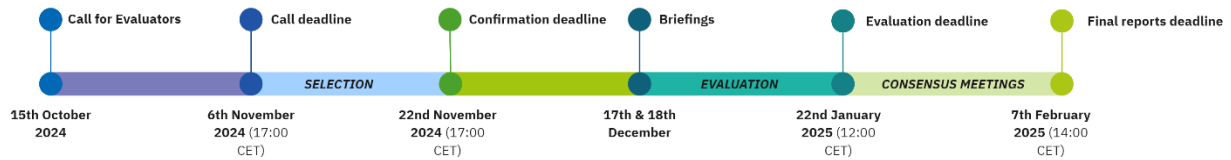
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[18] https://eit-culture-creativity.eu/
[19] The MEL Framework is a lively document, that is informed and adapted as the Initiative and the needs of HEIs evolve. Please consult the most up-to-date version at: EIT HEI Initiative MEL Framework.

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4. Timeline of the HEI Call 3 Evaluation Process

| Call for Evaluators | Call deadline | Confirmation deadline | Briefings | Evaluation deadline | Final reports deadline |

SELECTION   **EVALUATION**   **CONSENSUS MEETINGS**

| **15th October 2024** | **6th November 2024** (17:00 CET) | **22nd November 2024** (17:00 CET) | **17th & 18th December** | **22nd January 2025** (12:00 CET) | **7th February 2025** (14:00 CET) |

- Call for Evaluators opens: *15 October 2024*
- Call for Evaluators closes: *6 November 2024, 17:00 CET*
- Evaluators selected for EIT HEI Call for Proposals 2024 informed by EIT RawMaterials: *14 November 2024, 17:00 CET*
- Deadline for selected EIT HEI Call for Proposals 2024 evaluators to confirm participation to EIT RawMaterials: *22 November 2024 (17:00 CET)*
- Online Evaluator Briefings: *17, 18 December 2024*
- Evaluations assigned to evaluators: *19-20 December 2024*
- Remote individual evaluations: *20 December 2024 – 22 January 2025 (12:00 CET)*
- Remote consensus meetings: *27 January - 5 February 2025*
- Rapporteur preparation of combined evaluation scores and texts: *by 7 February 2025 (14:00 CET).*
- Remote Rapporteurs Panel meeting: *19 – 20 February 2025*

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5. Scope of the experts involved

5.1. Evaluation of proposals

A quality assessment to evaluate the extent to which the applications fulfil the evaluation criteria will be carried out with the support of at least three independent experts per application. The independent experts will be supported by guidelines developed by the EIT HEI Initiative Evaluation Committee and provide a ranking list following the scoring agreed by the experts.

The EIT HEI Initiative Evaluation Committee will oversee the entire evaluation and selection process. Using the ranking list resulting from the external, independent evaluation, the EIT HEI Initiative Evaluation Committee will make the final selection.

Excellence	Impact	Quality and efficiency of the implementation
▪ Clarity and relevance of the project's objectives. ▪ Quality of the proposed coordination and/or support measures, including soundness of methodology.	▪ Credibility of the pathways to achieve the expected outcomes and impacts specified in the work programme, and the likely scale and significance of the contributions due to the project. ▪ Suitability and quality of the measures to maximise expected outcomes and impacts, as set out in the dissemination and exploitation plan, including communication activities.	▪ Quality and effectiveness of the work plan, assessment of risks, and appropriateness of the effort assigned to work packages, and the resources overall. ▪ Capacity and role of each participant, and extent to which the consortium as a whole brings together the necessary expertise.

Scores will be awarded for the evaluation criteria, and not for the different aspects listed within the individual evaluation criteria. Evaluation criteria are not weighted. For submitted applications, each evaluation criterion – Excellence, Impact, Quality and efficiency of the implementation – will be scored out of 5, respectively. The threshold for individual evaluation criteria will be 3. The following rubric will be used to award scores to an application:

Score	Description
0	The application fails to address the criterion or cannot be assessed due to missing or incomplete information.
1	Poor. The criterion is inadequately addressed, or there are serious inherent weaknesses.

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2	Fair. The application broadly addresses the criterion, but there are significant weaknesses.
3	Good. The application addresses the criterion well, but a number of shortcomings are present.
4	Very good. The application addresses the criterion very well, but a small number of shortcomings are present.
5	Excellent. The application successfully addresses all relevant aspects of the criterion. Any shortcomings are minor.

Where an application might fall between two full scores, evaluators will be allowed to provide half points if duly justified. This will apply to all three evaluation criteria.

The total maximum evaluation score for an application is 15. A total score of at least 11 and meeting individual criteria thresholds guarantees that the proposal will be considered for funding. However, scoring 11 <u>does not</u> guarantee funding as it is dependent on number of applications received. Proposals with a score of 10 may be reviewed for funding by the EIT HEI Initiative Selection Committee, subject to budget limits. Proposals scoring below 10 will be rejected.

Successful and unsuccessful applicants will be informed in writing within the week of 3 – 7 March 2025. A reserve list for the call, based on the final ranking list of proposals, will be in place in case a selected project cannot move forward with their funding period.

5.2. Ex-aequo Proposals

When the total scores of two or more proposals are equal (ex-aequo cases), the priority order will be established as follows:

1. The proposals will be prioritised according to the scores they have been awarded for the criterion 'Excellence'. When these scores are equal, priority will be based on scores for the criterion 'Impact'.
2. If a distinction still cannot be made, the panel may decide to further prioritise by considering other factors such as gender and other diversity aspects in the innovation capacity building activities, participation of the non-academic sector, geographical diversity. These factors will be documented in the panel report.

5.2. General objectives

We are seeking external evaluators for strand A of the EIT HEI Initiative Call for Proposals 2024:

- Strand A: Innovation and entrepreneurship capacity building at Higher Education Institutions (HEIs).

The EIT HEI Initiative appoints external evaluators to support the assessment of applications submitted under this call. The proposals will focus on strengthening the innovation and entrepreneurial capacity of HEIs at an

institutional level. Strand B specifically targets the development of Deep Tech talent, recognizing its crucial role in shaping the future of innovation in Europe.

Independent external evaluators will contribute to the impartial evaluation of proposals and may also take on the role of rapporteur during the process.

5.3. Who we are looking for

These general conditions apply to the appointment of evaluators and rapporteurs to support the EIT HEI Initiative, primarily for tasks related to the evaluation of proposals submitted under the Call for Proposals 2024. Typically, three evaluators will be assigned to each proposal that successfully passes the eligibility check. Evaluators will assess each proposal based on the evaluation criteria outlined in the Call Text for EIT HEI Call for Proposals 2024.

While all three evaluators will review the proposals assigned to them, one will be designated as the rapporteur, responsible for consolidating and drafting the final evaluation report, while the other two will serve as standard evaluators.

5.3.1. Standard Evaluators

Standard Evaluators will be familiar with the relevant background documents (all call-related documents and guidelines) and attend the online briefing training with the EIT HEI Initiative's Coordination Team.

- They will qualitatively and quantitively evaluate the assigned proposals according to the pre-defined evaluation criteria.
- Standard Evaluators will appraise applications according to each specified criterion (and each related question) with a score accompanied by a clear qualitative statement in English, clearly justifying the given score as well as providing evaluation conclusions per criterion. If applicable, suggested recommendations/conditions should be included.
- Standard Evaluators are expected to be available to discuss their evaluations in consensus meetings with other evaluators, chaired by a rapporteur.

5.3.2. Rapporteurs

Rapporteurs must perform the same duties as Standard Evaluators, namely:

- They will be familiar with the relevant background documents (all call-related documents and guidelines) and attend the online briefing training with the HEI Initiative's Coordination Team. They will qualitatively and quantitively evaluate the assigned proposals according to the pre-defined evaluation criteria. Rapporteurs will appraise applications according to each specified criterion (and each related question) with a score accompanied by a clear qualitative statement in English, clearly justifying the given score as well as providing evaluation conclusions per criterion. If applicable, suggested recommendations/conditions should be included.

- The rapporteurs also play a further vital role in the evaluation process. They are independent arbiters who collate the convergent or divergent opinions of experts and summarise the three individual evaluation reports into an overall evaluation summary.
- Rapporteurs will create a list of pertinent open issues to resolve from the individual evaluation reports to be brought to the consensus meeting. During the remote consensus meeting, the evaluators will discuss the scores and justifications, with the rapporteur bringing the evaluators to consensus.
- After the consensus meeting takes place, the rapporteur will submit the consensus evaluation scores and consensus evaluation texts per evaluation criterion. The rapporteur will also submit an overall evaluation summary, summarising the overall score and justification.

5.4. Award criteria

5.4.1. Expertise

Evaluators and rapporteurs must possess expertise in innovation and entrepreneurship, as well as in capacity building within these fields. They should also have significant experience in fostering entrepreneurial ecosystems and supporting the development of innovation strategies at Higher Education Institutions (HEIs) or within the industry.

Experts are expected to come from diverse backgrounds, including industry, startups, civil society organisations or higher education institutions. Their experience should cover areas such as:

- Developing and implementing innovation strategies at institutional or organizational levels.
- Building entrepreneurial capacity within HEIs, industry, or startups.
- Supporting the commercialization of research outcomes and fostering knowledge transfer between academia and industry.
- Promoting collaboration between industry, startups, and academic institutions to drive innovation.

This expertise will be critical in evaluating proposals that aim to enhance the innovation and entrepreneurial capacity of HEIs, ensuring a high-quality, well-rounded assessment.

5.4.2. Assessment Criteria

Candidates will be assessed on their application. The EIT HEI Initiative team will assess candidates' profiles based on the following documents:

- Evaluator Application Form
- CV

The criteria for selection are based on the specificities of the assignment, taking into consideration the professional and technical skills required. Additional considerations may include English language skills, geographical, sector, under- or over-representation of expertise and gender balance.

Applicants should be aware of the following criteria before application:

- Evaluators can be of any nationality/citizenship but must have substantial experience in the expertise listed in section 5.4.1 in a European context
- Experience with EU-funded projects will be considered an asset
- Proven capacity to work in English is mandatory
- Previous experience as a rapporteur for evaluations will be considered an asset for those applicants who wish to apply to be rapporteurs.

Applications for assignments will be judged on relevance (demonstrating relevant experience and expertise) and quality (the standard of the application overall). Each criterion will be scored from $1 - 4$ (1= Poor, 2 = Fair, 3 = Good, and 4 = Excellent). The decisions made on behalf of the EIT HEI Initiative regarding the outcome of applications is final.

Applications will close on **6 November 2024 at 17:00 CET**.

The selected evaluators will then be asked to select one of the following dates for an Online Evaluator Briefing:

- PM Tuesday, 17 December2024
- AM Wednesday, 18 December 2024

A declaration of impartiality and confidentiality will be issued for signature alongside the service agreement. Additionally, experts will be required to submit a conflict-of-interest declaration for each proposal they evaluate.

5.5. Diversity

The EIT's HEI Initiative values diversity and welcomes applications from all suitably qualified candidates regardless of age, gender, race, disability, sexual orientation, religion, or ethnic background.

6. Payment for Participation

The payment is structured as such:

- Evaluator Briefing: 225 €
- Individual Remote Evaluation 225€ (per proposal)
- Panel Meeting: 56.25€ (per meeting)
- Consensus Meeting Attendance: 56.25€ (per meeting)
- Consensus Score and Feedback Submission (*Rapporteur only*): 56.25€ (per proposal)

7. How to Apply

An Evaluator Application Form is available here. Via this online form you will also be able to upload your CV and a Declaration of Non-Participation. Submission of a completed application form does not guarantee you will be selected for assignment but will enter you into the evaluator pool. The Expression of Interest will be valid for three years.

The criteria for selection as an evaluator are outlined above.

Prior to any work assignment, you will be issued guidelines covering a description of the tasks, duration, location (remote/physical), remuneration rates, and reimbursement methods. You will be issued a contract, which will include guidance on confidentiality.

The evaluators will also confirm the absence/existence of any conflict of interest with regards to an assigned proposal, based on the conflict-of-interest criteria provided during the Evaluator Briefing. Should a conflict of interest exist, the corresponding evaluator will be assigned to another proposal by the EIT HEI Initiative Coordinating Team.

Periodically, a Call for Evaluators may be reopened to maintain an open, transparent, and fair selection of experts.

Personal data will be processed in accordance with Regulation No 2018/1725.

8. Data Protection

Personal details which are submitted for the purpose of applying to the Call for Evaluators (names, email addresses, etc) will be stored by EIT RawMaterials for the purpose of processing applications, specifically for the following:

- to enable you to submit your application and CV to apply for specific call;
- to match your details with the potential assignments related to the call and to eventually contact you;
- to retain your details and notify you about future opportunities similar to the specific role for which you have contacted us;
- to answer your enquiries.

The personal data provided will be stored with the utmost of care and in accordance with data protection requirements. Applicants may at any time request to see the personal data that we hold relating to them, and request their deletion, by contacting hei@eitrawmaterials.eu.

The EIT HEI Initiative privacy policy can be found at https://eit-hei.eu/privacy-policy/.

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