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EVALUATION

Interim Evaluation of the Horizon Europe Framework Programme for Research and Innovation (2021 - 2024)

Accompanying the document

Communication from the Commission to the European Parliament and the Council

Horizon Europe: Research and Innovation at the heart of competitiveness

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Annex 28: Evaluation of EIT Urban Mobility

Annex to the Commission's interim evaluation of Horizon Europe

Contents

1. Effectiveness

The EIT Urban Mobility Knowledge and Innovation Community (KIC' or 'EIT Urban Mobility') is a young KIC that was established as part of the fourth wave of the EIT KICs, in accordance with Article 9 of the EIT Regulation, Regulation (EU) 2021/819 [1]. It was officially inaugurated in 2019, and its first operational activities and calls were launched in 2020. Therefore, many of the planned activities, as set out in the KIC's Strategic Agenda and business plans, are currently being rolled out. To achieve its objective, for the 2019-2023 period, EIT Urban Mobility received an EIT grant of EUR 159 million.

EIT Urban Mobility's main objective is to develop and facilitate innovative solutions in the urban mobility sector. To achieve this, the KIC focuses on tackling challenges with the aim of creating liveable urban spaces. Under Horizon 2020, EIT Urban Mobility was relevant for activities dealing with the societal challenge(s) on transport and energy, but the operationalisation and financing of its activities started mainly under Horizon Europe. EIT Urban Mobility under Horizon Europe has forged thematic synergies mostly with the 'Climate, Energy & Mobility' cluster under Pillar II.

The network of the KIC's partners includes leading organisations in the field of education, research and business from the entire value chain of the mobility sector across Europe. Given the sectoral focus of EIT Urban Mobility, cities are key members of the KIC, as they serve as living labs for piloting innovative solutions. EIT Urban Mobility currently includes more than 50 European cities.

Objectives and achievements

EIT Urban Mobility's 2021-2027 Strategic Agenda [2] has set the following five objectives: (1) creating liveable urban spaces; (2) closing the knowledge gap; (3) deploying green, safe, and inclusive mobility solutions for people and goods; (4) accelerating market opportunities; and (5) promoting effective policies and behavioural change. These objectives are aligned with the priorities of the 2019-2024 European Commission [3], in particular the green transition agenda that aims to achieve a liveable urban ecosystem, a climate-neutral and sustainable circular economy, inclusive and resilient urban mobility as well as a healthy urban population. They also reflect the strategic direction of Horizon Europe, ensuring consistency with EU policy objectives.

During its first three years in operation, EIT Urban Mobility has focused its activities primarily on future mobility, sustainable city logistics, mobility and energy as well as active mobility. EIT Urban Mobility's portfolio includes a dedicated service approach that goes beyond funding for projects. This is reflected in: i) the academic and professional training offers; ii) its ecosystem development approach across Europe; iii) the inclusion of the participating cities; and iv) the support for start-ups.

All of these strategic objectives are being implemented, and the results are delivered by the knowledge triangle integration concept, which brings together education, science and business. In the EIT Impact Framework, the EIT has defined several key performance indicators (KPIs) for the KIC's activities in innovation, business creation and education. Table 1 shows EIT Urban Mobility's achievements in terms of KPIs for 2020-2023.

[1] Regulation (EU) 2021/819 of the EIT (2021) replaced the original regulation, Regulation (EC) 294/2008.
[2] EIT Urban Mobility 2021-2027 Strategic Agenda.
[3] Political Guidelines for the European Commission 2019-2024.

Table 1: EIT Urban Mobility 2020-2023 KPIs; *targets (T) and achieved results (A)*

	2020		2021-2022		2023		**Total**	
	T	A	T	A	T	A	**T**	**A**
Innovations launched on the market	22	21	39	54	20	38	**81**	**113**
Designed/Tested innovations*			17	90	30	38	**47**	**128**
KIC Supported Start-ups/Scale-ups	82	81	345	472	100	405	**527**	**958**
Start-ups created of/for innovation	1	1	31	29	10	13	**42**	**43**
Start-ups created of EIT labelled MSc/PhD programmes	0	0	6	4	7	14	**13**	**18**
Investment attracted by KIC supported start-ups/scale-ups (EUR mil)	1	5,4	17,4	35	8	57,3	**26,4**	**97,7**
Graduates from EIT labelled MSc/PhD programmes	0	0	50	22	130	31	**180**	**53**
Participants in (non-degree) education and training*			9924	16295	4100	9417	**14024**	**25712**

* KPI only reported from 2021 (designed/tested innovations reports on IPR applications).

Source: EIT administrative and monitoring data (reported by the KIC and verified by EIT).

Overall, as the external evaluation highlighted[4], EIT Urban Mobility is on target with most of its KPIs, as also shown in the table above.

EIT Urban Mobility has been effective in supporting start-ups and/or scale-ups[5] through its entrepreneurship and business creation activities, overachieving the target set for 2020-2023 with a total of 958 supported companies (against the initial target of 527). Therefore, EIT Urban Mobility has been successful in its aim to provide a start-up-friendly environment including access to partners, infrastructure and finance. The countries in which these supported start-ups were registered were widely spread, including several countries associated with Horizon Europe and third countries. Moreover, the investment attracted for the supported start-ups and scale-ups was higher than originally planned, reaching over EUR 97 million for 2020-2023, significantly outperforming the target of EUR 26 million. For example, in 2023, EIT Urban Mobility was the top investor in European mobility start-ups according to Via ID and Dealroom [6]. In 2024, the Financial Times ranked EIT Urban Mobility (together with four other KICs) among the top 125 of Europe's leading start-up hubs [7].

When it comes to innovation activities, EIT Urban Mobility has performed well in bringing solutions to the market, exceeding the target of 81 set for 2020-2023 with a total of 113 innovations launched on the market. Similarly, the creation of new start-ups from innovative projects has reached the target set for 2020-2023 of 42 with a total of 43 new companies, as shown in the table above. The innovation projects usually focus on higher technology readiness levels (TRL), at 6 or higher. Smaller projects are funded, many of which have an experimental character or can be regarded as pilots. They are very much application-oriented and often try to include cities and citizens. Examples of the innovations launched on the market thanks to EIT Urban Mobility are *SOLUM* – solar-powered micromobility docking stations for e-scooters and e-bikes – and a solar-charging electric battery service. Its main goal is to encourage

[4] Deloitte and White Research, Three-year Interim Review of EIT Urban Mobility - Final Report, October 2023, p. 57p. 57.

[5] Partnership evaluation report – EIT Urban Mobility (2024), p. 19.

[6] https://www.eiturbanmobility.eu/eit-urban-mobility-is-the-most-active-investor-in-european-mobility-startups-in-2023/ Data extracted from the start-up database DealRoom, to track investment rounds and employment at start-ups supported by the KIC.

[7] Ranking - Europe's leading start-up hubs | Incubator Accelerator Programmes Europe (ft.com).

intermodality in Milan, Toulouse and Madrid, therefore contributing to the KIC's main focus of 'innovation and the actual piloting and experimentation in concrete urban spaces' [8].

A priority for EIT Urban Mobility during the last four years has been the establishment of academic education and vocational training offered within the KIC's 'Academy' pillar. In view of the external evaluation report [9], EIT Urban Mobility contributed to skills development in institutions as well as to upskilling/reskilling through its various education programmes, e.g. EIT-labelled master's degrees, the doctoral training network (DTN), the competence hub, and education capacity building. However, the KIC could not fully achieve certain initial goals at least not in its the early phase of the KIC, mainly due to the limitations imposed by the COVID-ovid-19 pandemic and its limitations. [10] In particular, challenges were identified regarding the number of graduates and the number of start-ups created from EIT-labelled programmes. For the 2020-2022 period, some 94 students were enrolled in EIT-labelled MSc and PhD programmes, but only 22 graduated, falling short of the target of 50. In 2023, only 31 students graduated from EIT-labelled programmes, also falling short of the target of 130. For 2020-2023 period, 18 start-ups were created from such programmes a number that meets the target of 13 set for the period but that still needs to increase to reach the target of 79 by 2027 [11]. On the contrary, as stated in the EIT Urban Mobility's highlights report from 2022 [12], 15 000 professionals have been trained by the Competence Hub, which indicates that a good progress has been made towards reaching the 2027 target of 42 500. The table above reveals a positive trend in the number of participants in non-degree education and training, with some 25 000 professionals already having been trained, above the goal set for 2021-2023 of 14 024.

EIT Urban Mobility currently runs two Master's programmes [13] (instead of the targeted four), but a call to broaden the offer was launched in autumn 2023 and a third Master's programme was launched in 2024 and is currently accepting applications[14] . EIT Urban Mobility has also established a PhD School that focuses on an additional entrepreneurship module to bridge the gap between research and how it is applied. Doctoral candidates can also apply for financial support if they want to establish a start-up. To make the work of the Academy more visible, EIT Urban Mobility has also started an inter-disciplinary academic journal.[15] While all course offerings and course programmes are evolving, as the challenges and technology evolve, EIT Urban Mobility offers more than 100 courses for different needs and stakeholders, having over 32 000 enrolled learners and over 25 000 graduates in non-degree programmes. This educational offer is being promoted, with initiatives such as creating a digital marketing strategy to increase the access to the EIT Campus, which is an online one-stop-shop for all education and training programmes offered by all EIT KICs [16].

[8] For more information and more examples, see EIT Urban Mobility Highlights Report 2020, pp. 18-32.
[9] Partnership evaluation report – EIT Urban Mobility (2024), p. 19.
[10] Partnership evaluation report – EIT Urban Mobility (2024), p. 19.
[11] Deloitte and White Research, Interim review of EIT Urban Mobility – final report (2023) p. 59.
[12] EIT Urban Mobility Highlights Report 2020, p. 12.
[13] These pan-European two-year master programmes combine innovation and entrepreneurship training with technology and more technical knowledge, based on a learning-by-doing approach to education. The double-degree programmes run in partnership with six leading European universities and involve industry and cities. Students complete a two-week summer school in two different cities addressing critical city-based challenges. EIT Urban Mobility Highlights Report 2020, p. 9. Partnership evaluation report – EIT Urban Mobility (2024), p. 19.
[14] EIT Administrative data (data reported by KICs and validated by EIT), November 2024.
[15] Partnership evaluation report – EIT Urban Mobility (2024), p. 19.
[16] https://eit-campus.eu/

Long-term scientific, societal, economic and technological impacts

The following societal impact indicators have been identified in the EIT Impact Framework 2022-2027 for the KIC's activities:

1) Improved quality of public space design and public infrastructure,

2) Repurposed traffic road space to public places,

3) Modal shift to clean and healthy mobility alternatives to motorised transport [17],

4) New competencies created that match future needs for the mobility sector and respond to city challenges,

5) Reduced CO_2 emissions and liveable urban areas created through implementation and scaling of solutions,

6) Increased share of public-private investments and incentives for sustainable urban mobility measures and services,

7) Increased citizen involvement and level of active participation in decision making and co-creation of urban mobility solutions,

8) Improved travel behaviour[18].

As the indicators were only introduced in 2021, the assessment focuses on the relevance of the KIC's activities in contributing to achieving these goals, rather than on the extent of the impact already achieved.

Nevertheless, according to the external evaluation report[19], the KIC's activities clearly point towards achieving the main challenge that it was designed to solve, in particular, improving the quality of life in cities, mitigating climate change thus stepping up urban resilience, and boosting the competitiveness of cities and the European mobility sector to create jobs.

As regards the way EIT Urban Mobility contributed towards improving the quality of public space design and public infrastructure, the KIC has been behind target, having achieved 31 public realm improvements in the period 2021-2022 compared to the 75 targeted.[20] Throughout 2021-2023, the KIC's was able to roll out 42 public realm improvements across Europe against the target set in the KIC's Strategic Agenda of 200 by 2024. [21]

EIT Urban Mobility aims to mitigate climate change by involving EU-level stakeholders and cross-KIC initiatives, taking on best practices from EIT Climate-KIC and supporting projects that create innovative urban mobility solutions, thereby moving towards climate-neutral cities. In view of the external evaluation report [22], the KIC has been working on several projects thus proving their commitment to achieving this goal. These activities include: i) the Zeus project for silent, emission-free deliveries; ii) the Ultimate project for public transport electrification; and iii) the Inclusiv_eBike project, which developed a new rickshaw e-bike concept for safe urban transport. In addition, in 2020, EIT Urban Mobility repurposed 10 227 m² of traffic roads into public spaces, far exceeding the target of 1 200 m² set in the 2021-2027 Strategic Agenda,

[17] According to the external evaluation report, this will only be monitored in 2024 against 2020 values and 2027 against 2024 values. Deloitte and White Research, Interim review of EIT Urban Mobility – final report (2023) p. 32.
[18] EIT Impact Framework 2022-2027 pp. 21-22.
[19] Deloitte and White Research, Interim review of EIT Urban Mobility – final report (2023), p. 28.
[20] Deloitte and White Research, Interim review of EIT Urban Mobility – final report (2023), p.32
[21] EIT Administrative data (data reported by KICs and validated by EIT), November 2024.
[22] Deloitte and White Research, Interim review of EIT Urban Mobility – final report (2023), p. 32.

with the aim of promoting healthy, clean mobility and flexible public space uses. [23]benefiting those who live in urban areas liveability, the local economy, and the environment.

EIT Urban Mobility aims to contribute to the European mobility sector by educating the next generation of urban mobility specialists by using its Master School, DTN and competence hub. To this end, the KIC has developed 101 new courses between 2021 and 2022**,** [24] and around 50 new courses in 2023[25], against the target set in the KIC's Strategic Agenda of 75 by 2024.

EIT Urban Mobility helps reduce both GHG and non-GHG emissions by implementing less polluting solutions like electric and autonomous ferries, electric bicycles and EV charging platforms, which can translate into savings of 10 027 tons of GHG emissions [26]. EIT Urban Mobility's portfolio of activities are designed based on how they contribute to four broad dimensions (society, knowledge, health, environment) and 19 categories of impact as defined by the Upright Project's Net Impact Model.[27] Ultimately, the KIC supported sustainable solutions developed tackle the complex urban challenges that include also conserving highly scarce natural resources (fresh water and certain minerals and metals), preserving ecosystems and protecting biodiversity (EV battery upcycling services) or promoting responsible waste management, recycling and resource sustainability (waste management data analytics and optimisation software).

Moreover, in 2021-2022 the KIC progressed towards achieving its goal of contributing to liveable urban areas by implementing and scaling up solutions, with 16 innovation pilot scaling, against a target of 17 [28]. However, by 2023 the total of pilots scaled up was 17, a bit far from the target set in the KIC's strategic Agenda of 39 innovation pilot scaling by 2024. [29]

Furthermore, EIT Urban Mobility boosts city competitiveness by stepping up business creation, providing training to citizens, engaging in innovation programmes, and implementing urban mobility solutions. As mentioned before, the KIC supports start-ups and entrepreneurs through accelerators and scale-up programmes and has launched various education initiatives to nurture and develop talent. On top of this, the KIC has implemented several education programmes to ensure the upscaling and fostering of talent. These programmes include EIT Label Master's degrees, the DTN, the competence hub, and capacity building in education.[30]

Furthermore, the KIC is working towards increasing the innovation capacity of cities through living labs and innovation programmes in order to increase public involvement and the level of active participation in decision-making and co-creation of urban mobility solutions. In 2021-2022, it developed 114 demonstrations, pilots and living labs, actively involving citizens and/or local associations and surpassing the target of 95.[31] However, the total for 2021-2023 amounted to 159[32] against a target set in the KIC's Strategic Agenda of 228 to be reached by 2024. This highlights EIT Urban Mobility's contribution to an increased share of public-private investments and incentives for sustainable urban mobility measures and services. Through

[23] Deloitte and White Research, Interim review of EIT Urban Mobility – final report (2023) p. 59.
[24] Deloitte and White Research, Interim review of EIT Urban Mobility – final report (2023) p. 68
[25] EIT Administrative data (data reported by KICs and validated by EIT), November 2024.
[26] 2024-Impact-Report-EIT-Urban-Mobility.pdf
[27] Categories of impact include jobs, taxes, societal infrastructure & stability, equality & human rights, knowledge infrastructure, scarce human capital, physical &mental diseases, nutrition, relationships, GHG emissions, biodiversity or waste
[28] Deloitte and White Research, Interim review of EIT Urban Mobility – final report (2023), p. 48.
[29] EIT Administrative data (data reported by KICs and validated by EIT), November 2024
[30] Deloitte and White Research, Interim review of EIT Urban Mobility – final report (2023), p. 33.
[31] Deloitte and White Research, Interim review of EIT Urban Mobility – final report (2023), p. 63
[32] EIT Administrative data (data reported by KICs and validated by EIT), November 2024.

initiatives like living labs, City Club, and ChallengeMyCity, the KIC has made progress towards achieving this goal.

Since EIT Urban Mobility was launched as part of the fourth wave of the EIT KICs, with its first operational activities and calls launched in 2020, a more accurate assessment of its impact targets will be conducted during the seven-year comprehensive review starting in 2025, as donewith the first three waves of KICs.

EIT Urban Mobility has also identified several economic long-term impact goals. These are defined in the EIT Impact Framework 2022-2027 as follows:

- contribution to the revenue growth of organisations trading or employing innovations developed with the KIC support;
- number and revenue of start-ups and scale-ups supported by KICs trading three years after KIC support ceased;
- new jobs created in start-ups and scale-ups;
- impact on employment growth as a result of company being engaged with KICs;
- number and type of jobs in existing businesses sustained through innovations;
- number and type of skill gaps and/or skill shortages filled, by KIC sector;
- visible innovation ecosystems not previously in existence;
- share of indicated innovation ecosystems that covers RIS countries [33].

EIT Urban Mobility has worked towards job creation and the strengthening of the European urban mobility sector by providing reskilling and upskilling programmes through its academy and its programmes supporting start-ups and scale-ups [34]. In the recently published 2024 Impact Report, it is estimated that the KIC‘s contribution could translate into 1 070 direct or indirect jobs being created thanks to EIT Urban Mobility support [35]. Therefore, the KIC has: contributed to skills development in institutions as well as upskilling and reskilling (e.g. NewUM, Urban Mobility Digital Talent).

Due to EIT Urban Mobility being a young KIC, information on the long-term impact of EIT-labelled programmes on participants' career growth is not yet available. This will be part of the seven-year assessment starting in January 2025.

2. Additionality

Table 2 provides the basic financial figures for EIT Urban Mobility since it started operating in 2019. EIT Urban Mobility was able to achieve a direct leverage factor [36] of 0.16 in 2019-2023 (if one only takes co-funding from partners related to the EIT grant into consideration) and 0.26 (if one adds revenues created through KIC activities (EUR 41 million vs the EIT grant of EUR 159 million).

Table 2: EIT Urban Mobility financial figures (in EUR million)

[33] EIT Impact Framework 2022-2027 , pp. 7-11.
[34] Deloitte and White Research, Interim review of EIT Urban Mobility – final report (2023), p. 47.
[35] 2024-Impact-Report-EIT-Urban-Mobility.pdf
[36] Ratio of the direct leverage to the EU contribution. This is calculated as: direct leverage factor = (1/(Funding rate))-1.

	2019	2020	2021	2022	2023	Total
EIT grant	3,7	27,6	28,4	47,4	51,9	**159,0**
Co-funding	0,4	5,4	4,1	7,2	8,8	**25,8**
Revenues		2,8	3,4	5,8	3,5	**15,5**
Activities not funded by EIT		48,0	0,0	0,3	19,7	**68,0**
Co-investment, i.e. investments attracted by start-ups		5,4	4,3	30,6	57,3	**97,6**

Source: EIT financial data; reported by KICs and validated by the EIT (also available in Corda). EIT Grant 2023 figures are derived from three-year business plans.

In terms of leverage effects for the EIT KICs, the specificity of the EIT model requires the monitoring of additional leverage not only through co-funding and the revenues of EIT KICs that are directly reinvested back into the KICs activities, but also through the non-EIT funded activities [37] as well as the co-investments attracted by the companies supported through the EIT.

When the activities funded by direct contributions from partners and affiliated entities (activities not funded by the EIT) are considered, EIT Urban Mobility achieved a leverage factor of 0.69 in 2019-2023. When the co-investments (i.e. investments attracted by start-ups of EUR 97 million) are also included, the leverage factor rises to 1.3 over the period of EIT Urban Mobility's lifecycle to date. This means for every euro of EIT funding spent, EIT Urban Mobility activities have helped to attract EUR 1.3 in external investment.

Significantly, there are very large differences between the KICs, with very high leverage effects in some cases for the older KICs and significantly lower leverage effects for the newer KICs, such as EIT Urban Mobility. The conclusion from this observation suggests that a start-up phase is needed to achieve a higher financial leverage effect.

3. Transparency and openness

EIT Urban Mobility started its operation with a rather wide partnership network, which has been growing steadily. In 2019, its start-up year, the KIC already had 85 member organisations from 16 European countries [38] . Between 2020 and 2021, the number of partners increased from 144 to 210, while in 2022 the partnership showed continuous growth, reaching 311 partners. The fluctuation within the partnership was rather low, as only 7 partners have withdrawn since 2021, which also shows that the revision of the partnership model carried out in 2022 (see section 10) was quite successful in retaining partners. In its 2021-2027 Strategic Agenda, EIT Urban Mobility set a target of having 257 partners by 2022 and 327 partners by 2027. Based on the partnership growth witnessed between 2020 and 2022, the external evaluation report concludes that the KIC has overachieved its set targets for 2022 [39].

EIT Urban Mobility is open to new partners and membership applications are part of a fully open process, with clear instructions on the website [40]. Similarly, the KIC's calls have been accessible, and clear information has been made available online. In 2022 the KIC's partnership model was revised, and a new, service-based, more open approach was introduced. The reform also resulted in decreased partnership fees and opportunities being offered to organisations to

[37] Non-EIT financed activities (NEFAs) are fully implemented without an EIT grant but must contribute to KIC's Strategic Agenda and must be based on the EIT Knowledge Triangle Integration concept. They replaced the former KIC complementary activities (KCAs) applied in 2014-2020 under Horizon 2020.
[38] Deloitte and White Research, Interim review of EIT Urban Mobility – final report (2023), p. 87.
[39] Deloitte and White Research, Interim review of EIT Urban Mobility – final report (2023), p. 87.
[40] Deloitte and White Research, Interim review of EIT Urban Mobility – final report (2023), p. 79.

take part in activities with lower or no financial contribution [41]. So far, as concluded by the external evaluation study, the new partnership model was successful, EIT Urban Mobility managed to retain its partnership and maintain a growing trend [42].

In view of the external evaluation report [43], the EIT Urban Mobility's partnership reflects the extended knowledge triangle, where cities also involved along with education, research and business organisations. The partnership includes businesses from various areas of the mobility industry including some high-profile actors. Furthermore, cities are also represented within the partnership including multiple city municipalities. As the KIC's innovation programmes have prioritised higher Technology Readiness Levels (TRL) and inclusivity Key Performance Indicators (KPIs), research organisations have found these programmes less appealing due to their focus on marketed innovations [44]. The lower percentage of research institutions is a natural consequence of the sectoral needs [45].

In 2022, out of the 311 EIT Urban Mobility partners, 102 were SMEs which represented 33% of all the partners. In terms of financial support, about 15% of the total 2021-2022 EIT Urban Mobility grant of EUR 76 million was directed towards SMEs. As of October 2024, the number of SMEs participating in the EIT grant agreement for 2023-2025 had increased to 53% of all active partners, with EUR 24.5 million directed towards SMEs, representing 22% of the total EIT grant [46].

In terms of transparency, the KIC's calls have been available on their website since 2021. The evaluation process is clearly outlined, and external experts are involved in the scoring of the proposals. According to the external evaluation report [47], the project selection process looks solid and transparent. In addition, core partners are involved in developing the business plans and strategic dialogues on priorities, and they can influence the work agenda [48].

4. Efficiency

Table 3 sets out EIT Urban Mobility's operational budget and administrative expenditure (or running costs). The running costs include the management, governance, coordination, organisation and overhead expenditure paid from the EIT grant. This does not include the contribution from EIT Urban Mobility's partners.

Table 3: EIT Urban Mobility operational and administrative expenditure (in euro)

	2020	2021	2022
Operational Expenditures	28 009 807 €	27 353 806 €	47 536 964 €
Running Costs	5 096 651 €	5 173 164 €	7 054 496 €
Total budget	**33 106 458 €**	**32 526 971 €**	**54 591 460 €**

Source: EIT Financial Data; reported by KICs and validated by EIT

[41] Deloitte and White Research, Interim review of EIT Urban Mobility – final report (2023), p. 86.
[42] Deloitte and White Research, Interim review of EIT Urban Mobility – final report (2023), p. 86.
[43] Deloitte and White Research, Interim review of EIT Urban Mobility – final report (2023), p. 79.
[44] Deloitte and White Research, Interim review of EIT Urban Mobility – final report (2023), p. 82.
[45] Deloitte and White Research, Interim review of EIT Urban Mobility – final report (2023), p. 87.
[46] While the EIT grant agreement for 2023-2025 is being implemented, the grant committed to SMEs and the number of SMEs, and their participation can still increase in the upcoming months and next year as EIT Urban Mobility has still calls to open and sign new projects.
[47] Deloitte and White Research, Interim review of EIT Urban Mobility – final report (2023), p. 79
[48] Partnership evaluation report – EIT Urban Mobility (2024), p. 27

Table 3 indicates that the running costs for EIT Urban Mobility's headquarters and co-location centres (CLCs) for 2020-2022 ranged between 12.9% and 15.9%, at an average of 14.4%. Taking into account only the administrative costs of EIT Urban Mobility's headquarters, the average ratio of administrative costs to EIT Urban Mobility's overall operational budget dropped to 10.6% for the Horizon Europe period. This shows that the impact of the CLCs network on the administrative expenditure is obvious, because this decreased considerably once the costs related to the CLCs are excluded.

The EIT KICs are pan-European networks with many offices on the ground across Europe. These offices are an operational activity carried out by the KICs at a corresponding administrative cost. The EIT has, in order to keep these administrative costs at an acceptable level, set maximum thresholds in its guidelines to the KICs for the EIT-funded share of the KICs' administrative costs depending on the KICs' maturity. The values range from 18% and 15% in the first and second years of a KIC, respectively, to a constant of 12% from the third year until the end of the partnership lifecycle. If the EIT KICs were, as beneficiaries of EIT grants, to follow the rules of EU public entities, the expenses related to CLCs would be treated as operational expenditure related to ground operations, rather than as administrative expenditure. In such circumstances and considering that one of the core operational aspects of the EIT model is to support location-based innovation locally and regionally, it would be more appropriate to take only the administrative expenses of the EIT KICs' headquarters into account.

EIT Urban Mobility's headquarters are located in Barcelona. There are five CLCs, which are located in Munich, Amsterdam, Prague, Copenhagen and Barcelona. These five innovation hubs cover different geographic areas (i.e. central, east, north, south and west) with several countries located within these areas. Their task is to reach out to partners all over Europe and create a vibrant innovation ecosystem that enables the Strategic Agenda and the business plans to be implemented. Collaboration between the innovation hubs is ensured by the general rule that innovation projects need to involve partners from at least two hubs.

Despite the adverse circumstances resulting from the COVID-19 pandemic in 2020 and 2021, EIT Urban Mobility quickly got off the ground and published its first calls as early as in the second half of 2020. Several of the planned activities contained in EIT Urban Mobility's business plan are currently being rolled out. The number of activities [49] increased remarkably from 2021 to 2022. However, there are not enough outcomes yet to make a reliable assessment of its overall efficiency at this stage [50].

Nevertheless, in its very early years of operation, the KIC has been particularly effective in supporting start-ups, through its educational activities (especially regarding professional programmes) and knowledge exchange (e.g. through the annual 'Tomorrow.Mobility World Congress', which attracts over 25 000 participants). The first pilots of new processes and products, which involved companies, start-ups, research organisations, universities and citizens through living labs, took place in concrete urban spaces and more than 150 market-ready mobility solutions designed by innovative entities are available on the digital platform [51].

2023 data indicate that the average time-to-grant for calls launched by EIT Urban Mobility is 3.2 months.

[49] The EIT Urban Mobility business plan consists of activities (projects), commonly referred to as KAVA's – KIC added value activities.
[50] Partnership evaluation report – EIT Urban Mobility (2024), p. 31
[51] Partnership evaluation report – EIT Urban Mobility (2024), p. 31

5. Coherence and synergies

Building synergies has been a priority for the KIC ever since it was created, as highlighted in its Business Plans and Strategic Agenda.

The main conclusion from the external evaluation report [52] is that EIT Urban Mobility cooperates effectively with key networks and associations that support and share the same goals. Therefore, it is able to accelerate its actions and achieve greater impact.

EIT Urban Mobility has also been successful in aligning its activities and vision with relevant EU policy objectives (e.g. European Green Deal, 2030 Climate Target Plan, Sustainable and Smart Mobility Strategy) [53]. In addition, EIT Urban Mobility has established relationships with relevant key-stakeholders, such as the European Innovation Council (in particular the Accelerator instrument) and the Digital Europe Programme.

Moreover, the KIC has also signed memoranda of understanding (MoUs) with institutions such as the Spanish Ministry of Transport [54] and the French Innovation Agency [55]. They provide a joint framework for collaboration on addressing the current and future urban mobility challenges. Partnerships have also been forged with leading EU-funded city initiatives, like CIVITAS, Smart Cities Marketplace and Net Zero Cities [56] supporting the Mission on Smart and Climate Neutral Cities.

When it comes to synergies with other European partnerships and missions within Horizon Europe, the EIT KIC community is clearly very active, as highlighted in the 2024 Biennial Monitoring Report [57]. EIT Urban Mobility has been able to create synergies, in particular with Pillar II Global Challenges, Cluster 5 (climate, energy and mobility), as well as with other partnerships (CCAM, 2ZERO and Driving Urban Transition). The KIC has shown that it can complement the work of other partnerships, particularly in facilitating the green and digital transitions.[58]

The EIT KICs have established several EIT Community initiatives, thereby forging synergies with other KICs. EIT Urban Mobility is very active in these initiatives and supports different clusters, e.g. the Strategic Synergies cluster and the Shared Services cluster [59]. Within the EIT Circular Economy Community, EIT Urban Mobility has joined forces with EIT RawMaterials, EIT Climate-KIC, EIT Food and EIT Manufacturing to create an environment that enables creative thinking and innovation. The EIT Campus, an online platform bringing together diverse programmes in the world of innovation, sustainability, entrepreneurship and technology, is a cross-KIC initiative led by EIT Urban Mobility [60].

[52] Deloitte and White Research, Interim review of EIT Urban Mobility – final report (2023), p. 76.
[53] Partnership evaluation report – EIT Urban Mobility (2024), p. 15.
[54] https://www.eiturbanmobility.eu/mitma-ministry-of-transport-mobility-and-urban-agenda-of-spain-and-eit-urban-mobility-agree-on-moving-forward-their-collaboration-agreement-in-2023/.
[55] https://www.eiturbanmobility.eu/eit-urban-mobility-and-the-innovation-agency-for-transport-join-forces-to-promote-innovation-in-france/.
[56] https://eit.europa.eu/news-events/news/netzerocities-eit-urban-mobility-working-support-cities-achieve-climate-neutrality.
[57] European Commission: Directorate-General for Research and Innovation, Performance of European partnerships – Biennial monitoring report 2024 on partnerships in Horizon Europe, Publications Office of the European Union, 2024, https://data.europa.eu/doi/10.2777/991766, p. 56.
[58] Partnership evaluation report – EIT Urban Mobility (2024), p. 15.
[59] Deloitte and White Research, Interim review of EIT Urban Mobility – final report (2023), p. 76.
[60] EIT Campus online platform - EIT Campus (eit-campus.eu).

6. EU added value

According to the external evaluation [61], EIT Urban Mobility creates EU added value thanks to the pan-European integration of the knowledge triangle, which enables the relevant problems related to transport and mobility across Europe to be addressed using a bottom-up approach. EIT Urban Mobility is oriented towards innovation and experimentation in concrete urban spaces, and by cooperating with cities, it also contributes to non-technological innovations.

EIT Urban Mobility relies on city partnerships to achieve its goal of building a sustainable ecosystem. Thanks to its European scale, the KIC has been able to implement many city-based programmes helping to address the urban mobility challenges [62].

EIT Urban Mobility's innovation hubs on the ground [63] as well as its Regional Innovation Scheme (RIS) hubs [64] have played a central role in building pan-European ecosystems in the area of urban mobility. They support start-ups, disseminate calls and inform local, regional and national authorities about the opportunities provided by the KIC. They meet local needs and link local partners into European networks [65].

According to the external evaluation [66], EIT Urban Mobility also offers EU added value at the programmatic-content level. This happens, firstly, through the European, transnational and regional ecosystems mentioned above that focus on deploying applicable urban mobility solutions to the market, for example, products supporting the fight against climate change. Secondly, EIT Urban Mobility differs from most other European programmes and initiatives in urban mobility in so far as the KIC targets higher TRLs that are strongly focused on innovation and start-ups. This depicts EIT Urban Mobility as an impact-driven venture organisation [67].

7. Relevance

The conclusion from the external evaluation report [68] is that EIT Urban Mobility is fully aligned with the EU's objectives. EIT Urban Mobility was set up under Horizon 2020 and responded to the societal challenge 'Smart, green and integrated transport'. This includes the notion of a resource-efficient and climate- friendly and safe European transport system to benefit the public, which should lead to better mobility, less congestion and more safety and security. This is also reflected by EIT Urban Mobility's three societal impact goals: 1) improving quality of life in cities; 2) mitigating and adapting to climate change; 3) creating jobs and strengthening the European urban mobility sector. Under Horizon Europe, EIT Urban Mobility contributes to all specific objectives, in particular to climate-neutral and environmental-friendly mobility, as well as safe, seamless, smart, inclusive, resilient, climate-neutral and sustainable mobility systems [69].

In addition, EIT Urban Mobility is also aligned with the 2022-2024 European Research Area (ERA) Policy Agenda [70]. This is especially the case for the actions related to: i) partnerships; ii) the green and digital transition of industrial ecosystems; iii) knowledge valorisation; and iv)

[61] Deloitte and White Research, Interim review of EIT Urban Mobility – final report (2023), p. 30.
[62] Deloitte and White Research, Interim review of EIT Urban Mobility – final report (2023), p. 30.
[63] https://www.eiturbanmobility.eu/our-hubs/.
[64] https://www.eiturbanmobility.eu/ris/.
[65] Partnership evaluation report – EIT Urban Mobility (2024), p. 22.
[66] Partnership evaluation report – EIT Urban Mobility (2024), p. 22.
[67] Partnership evaluation report – EIT Urban Mobility (2024), p. 21.
[68] Partnership evaluation report – EIT Urban Mobility (2024), p. 13.
[69] Partnership evaluation report – EIT Urban Mobility (2024), pp. 13-14.
[70] European Research Area Policy Agenda 2022-2024.

bringing science closer to people. Furthermore, its activities also help achieve the UN Sustainable Development Goal on sustainable cities. According to the external evaluation [71], EIT Urban Mobility also contributes to research careers via its international academic and vocational training offers and actively supports gender mainstreaming through its investments in gender-balanced start-ups.

As regards flexibility, EIT Urban Mobility has been flexible in adjusting its objectives, activities and resources to changing policy needs and requirements. These adjustments have been made through the KIC's business plans. The KIC's flexibility is also shown through its ability to join new initiatives quickly, such as the New European Bauhaus Initiative (NEB) [72], an EIT Community activity launched in 2021.

8. Directionality

After three years, EIT Urban Mobility's activities are aligned with EU objectives, especially the Green Transition Agenda. All resources are invested into activities linked to the Green Deal objectives [73].

Furthermore, the KIC is making progress in contributing to boosting economic growth and fostering innovation and entrepreneurship capacity in EU Member States [74]. The KIC's activities address the societal challenges it aims to tackle, namely improving the quality of life in cities, mitigating climate change, and boosting the competitiveness of cities and the European mobility sector to create jobs [75]. As an example, through innovation and collaboration with SMEs and research institutes, the KIC has created innovative mobility solutions and products that support the fight against climate change [76].

Overall, while EIT Urban Mobility must still reach its maturity, which implies that it is still difficult to assess its concrete effects and outputs, its activities in collaboration with cities, businesses, start-ups and scale-ups as well as education institutions are already helping to address the societal challenges it aims to tackle.[77]

9. International positioning

EIT Urban Mobility is pre-dominantly EU oriented, which is reflected in its network of partners [78]. However, the KIC also has partners from associated countries (Israel, Norway, Serbia, the UK and Türkiye) and third countries (Argentina, Mexico, Switzerland and the USA). Among EIT Urban Mobility's 50 core partners, only 4 are organisations from non-EU Member States [79].

In 2021 and 2022, 3.4% of all start-ups supported by EIT Urban Mobility involved third countries. The share of supported start-ups registered in associated countries in the same period

[71] Partnership evaluation report – EIT Urban Mobility (2024), p. 14.
[72] The NEB, launched in early 2021, seeks to make the EU a leader in the circular economy, create a sustainable environment and provide inclusive, accessible spaces.
[73] Partnership evaluation report – EIT Urban Mobility (2024), p. 24.
[74] Deloitte and White Research, Interim review of EIT Urban Mobility – final report (2023), p. 26.
[75] Deloitte and White Research, Interim review of EIT Urban Mobility – final report (2023), pp. 26-28.
[76] EIT Urban Mobility, Highlights Projects 2020-2022, Mobility for more liveable urban spaces, 2021. EIT Urban Mobility, Highlights report 2022, Mobility for more liveable urban spaces, 2022.
[77] Deloitte and White Research, Interim review of EIT Urban Mobility – final report (2023), p. 33.
[78] https://www.eiturbanmobility.eu/our-partners/.
[79] Partnership evaluation report – EIT Urban Mobility (2024), p. 25.

was significantly higher, namely 12.6%, because many are registered in Türkiye (32) and Serbia (15).[80]

EIT Urban Mobility participates in the EIT Global Outreach Programme's [81] activities and the Strategic Regional Innovations (SRI) [82]. The Programme was established in 2018 and links the EIT's innovation ecosystem with innovation valleys worldwide, forging synergies with global innovation leaders and creating significant value for the European economy as well as local ecosystems. The Programme currently comprises established and successful EIT hubs in Silicon Valley (USA) [83], Tel Aviv (Israel) [84] and London (UK) [85]. Under the SRI, activities are currently being developed in the Western Balkans, Türkiye and Ukraine. These will in the future expand into Moldova and potentially Georgia, in line with the EU's enlargement policy priorities. In these countries, EIT Urban Mobility has been tasked with overseeing the opening of EIT Community RIS hubs. The first opened in Skopje (North Macedonia) in June 2023 [86], followed by Ukraine in December 2023, and Montenegro in May 2024 [87].

In addition, even if EIT Urban Mobility has not developed priority towards R&I internationalisation, the KIC considers itself as central to the development of a pan-European ecosystem for urban mobility. For example, EIT Urban Mobility's flagship event 'Tomorrow.Mobility World Congress' [88] that takes place in Barcelona every year, provides a meeting place for the global urban mobility community. With participants coming from over 130 countries, it gives the KIC a high level of international visibility [89].

10. Phasing-out preparedness

The EIT Regulation [90] defines 'financial sustainability' as the EIT KICs' capacity to finance their knowledge triangle activities independently from the EIT contributions. It asks the EIT KICs to pursue this goal by implementing an effective financial sustainability strategy that involves mobilising funds from other public and private sources before the end of the 15-year period of EIT funding. The closer an EIT KIC gets to the end of its EIT funding period, the less EIT funding it receives and the more alternative funding sources it needs to find. The emphasis is on encouraging KICs to secure a larger share of their funding from external sources in order to ensure their long-term viability and continue their activities effectively. The challenge is for the KICs to secure adequate co-funding from other sources.

EIT Urban Mobility recently entered its ramp-up phase, in which 80% of its annual funding comes from EIT sources the EIT expects the KIC to start generating its own revenue already now so that it can gradually reduce its dependency from EIT funding.

In fact, in line with the financial sustainability strategy adopted in its Strategic Agenda, EIT Urban Mobility has gradually diversified its revenue portfolio. Despite the amounts still being modest, the KIC has started generating revenues from its provision of services and consultancy,

[80] Partnership evaluation report – EIT Urban Mobility (2024), p. 25.
[81] https://go-eit.eu/.
[82] https://eit-ris.eu/.
[83] https://go-eit.eu/eit-silicon-valley-hub/.
[84] https://go-eit.eu/eit-israel-hub/.
[85] https://go-eit.eu/eit-uk-hub/.
[86] https://eit.europa.eu/news-events/news/eit-launches-innovation-hub-north-macedonia .
[87] https://eit.europa.eu/news-events/news/new-innovation-hub-opens-ukraine-eit-continues-strengthen-support-ukrainian.
[88] https://www.tomorrowmobility.com/.
[89] Partnership evaluation report – EIT Urban Mobility (2024), p. 26.
[90] In particular, Article 2, (16) and Article 6 (i). Regulation (EU) 2021/819 of the EIT (2021).

its education activities, and alternative funding sources. Furthermore, it obtained its first revenues from returns on investment in its innovation projects. At the same time, the membership fees from partners represent a substantial revenue source, accounting for 45% of total revenues in 2023 [91]. As of the end of 2023, EIT Urban Mobility reported 105 equity shareholdings in start-ups with a market value estimated at EUR 11.8 million. In addition, the KIC has 36 commercial agreements in place with different initiatives running in the innovation, education and business creation sectors, which aim to contribute to the KIC's financial sustainability based on revenue-sharing, tuition fees and service agreements.

In 2021, the reported financial sustainability coefficient [92] was slightly higher than the targeted percentage, which shows that the KIC has already started incorporating additional revenue sources from the market through commercialised services, equity investments, etc. [93] In 2022, the figure was slightly below target, due to decrease of revenues from membership fees following changes in the KIC's membership scheme (see Section 3).

In 2021-2022, EIT Urban Mobility carried out two reforms: (1) a revision of the partnership model from a 'grant for fee' to a 'services for fee' model, focused on delivering value offers to partners in return for their annual service subscription; (2) a shift from 'funder' to 'impact investor', aligning innovation, academy and business creation programmes to ensure the more stable creation of and investment in start-ups [94]. This change has significantly helped to achieve a more diversified, albeit still modest revenue basis, as can be seen from the start of 2023.

Overall, EIT Urban Mobility seems to be on the path towards financial sustainability despite its short period of activity and the COVID-19 pandemic, which made its start-up phase even more challenging. Looking into the future, the main goal of EIT Urban Mobility's main goal in the coming years will be to increase its revenues from alternative sources and services to start-ups and put more emphasis on strong financial sustainability mechanisms. As the market for urban mobility services has significant potential, EIT Urban Mobility is well-positioned for future growth in a global economic segment.

[91] Deloitte and White Research, Interim review of EIT Urban Mobility – final report (2023), p. 97.
[92] Financial sustainability coefficient (FS coefficient) is the ratio of KICs own revenues compared to EIT grant in a given year.
[93] Deloitte and White Research, Interim review of EIT Urban Mobility – final report (2023), p. 100.
[94] https://www.eiturbanmobility.eu/wp-content/uploads/2022/12/EIT-UM_-Highlights-Report_2022.pdf.