

DigiFed

Digital Innovation Hubs Federation For Large Scale adoption of digital technologies by European SMEs

# Open call 1, Guide for Applicants

March 2020

Closing date for the 1<sup>rst</sup> Open Call: 09.06.2020, 5 pm (Brussels Time)

**Important:** DigiFed offers 3 opens calls, the second call in September 2020 and the third one in March 2021





#### Short Description

The Guide for Applicants contains the basic information needed to guide you in preparing a proposal for submission to the DigiFed Open Calls. It gives an introduction on how to structure your proposal. It also describes how the proposal should be submitted, and the criteria on which it will be evaluated.

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# List of abbreviations

| AE   | Application Experiment   |  |
|------|--|--|
| CPS  | Cyber-Physical System  |  |
| FSTP | Financial Support to Third Party, also called Cascade Fnding               |  |
| I4MS | ICT innovation for Manufacturing SMEs (https://i4ms.eu/)                   |  |
| IP   | Intellectual Property  |  |
| SAE  | Smart Anything Everywhere initiative (https://smartanythingeverywhere.eu/) |  |





### 1.General information

The **Guide for Applicants** contains the basic information needed to guide you in preparing a proposal for submission to the DigiFed Open Calls. It gives an introduction on how to structure your proposal. It also describes how to submit the proposal and the evaluation criteria.

#### Please note:

Every selected applicant will be required to sign a Standard Agreement, a model example of which can be found at the https://digifed.org/explore/ website.

This Guide for Applicants does not supersede the rules and conditions laid out, in particular, in Council and Parliament decisions relevant to the H2020 framework programme.

#### DigiFed consortium

The DigiFed consortium brings together the following members:



- CEA Leti, France
- AVL List GmbH, Austria
- Budapest University of Technology and Economics (BME), Hungary
- Blumorpho, France
- Digital Catapult, UK

- Ikerlan, Spain
- Minalogic, France
- STMicrolectronics, France & Italy
- Steinbeis-Europa-Zentrum, Germany
- University of Ljubljana, Slovenia
- Zabala Innovation Consulting, Belgium

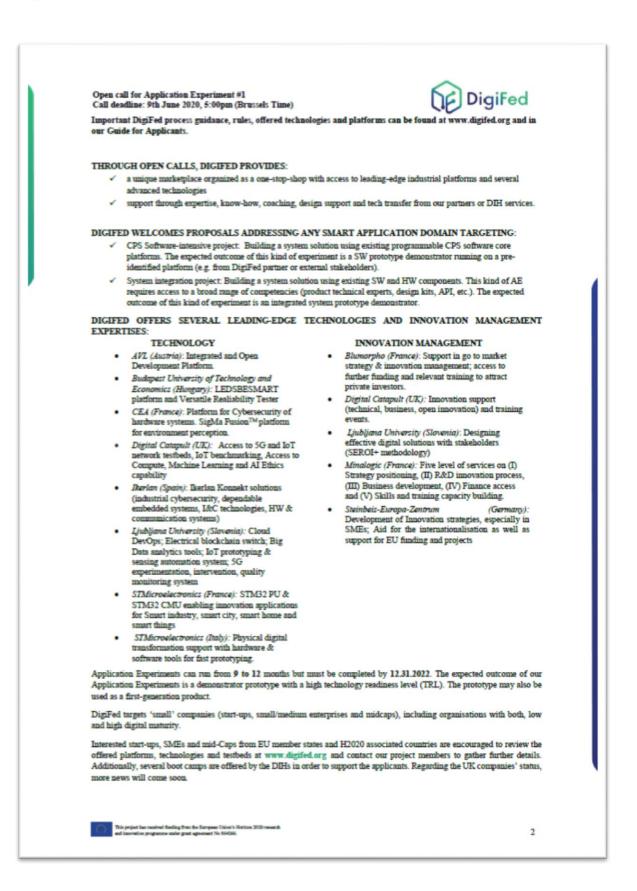


# 2. Scope of the Call

Open call Scope here









Open call for Application Experiment #1 Call deadline: 9th June 2020, 5:00pm (Brussels Time) DigiFed DigiFed contributes to the European Commission Initiative to help digitize European Industry, the Smart Anything Everywhere Initiative (https://smartanythingeverywhere.eu/). This project has received familing from the European Union's Horizon 2020 research and intervation programme under grant agreement No 504056. 3



### 3. Rules and conditions

To avoid conflicts of interest, applications involving or coming from persons or organizations who are partners in the DigiFed consortium or who are formally linked to partners of the DigiFed consortium will not be accepted. For the purposes of this call for proposals, "organizations formally linked to the partners of the DigiFed consortium" are understood according to the definition of affiliated entities and third parties with a legal link to a beneficiary described within the H2020 Annotated Model Grant Agreement – Art. 14 — Implementation of Action Tasks by Linked Third parties (available at: https://ec.europa.eu/research/participants/data/ref/h2020/grants\_manual/amga/h2020-amga\_en.pdf).

#### 3.1 Eligible countries

Legal entities established in the following countries are eligible to receive funding through this Open Call:

- Member States (MS) of the European Union (EU), including their overseas departments
- The H2020 Associated Countries
- <u>UK companies</u> remain eligible for grants and procurement procedures as if the UK was a member state for the entirety of the Horizon 2020 framework programme and previous framework programmes. This also applies for to financial support to third parties according to Article 204 FR (cascading grants), and applies for the duration of H2020 projects.

The EU Associated Countries participate in Horizon 2020 under the same conditions as the EU Member States, as explained at http://iprhelpdesk.eu/node/2552.

A list with all eligible Associated Countries can be found here: https://ec.europa.eu/research/participants/data/ref/h2020/grants\_manual/hi/3cpart/h2020-hi-list-ac\_en.pdf

Legal entities established in any other country or region cannot receive funding in this open call.

#### 3.2 Targeted companies

DigiFed is targeting the following types of companies from the eligible countries mentioned above:

- Startups
- Small and Medium Sized Enterprises<sub>1</sub>
- Midcaps<sub>2</sub>

A legal entity will be considered **an SME** if it complies with the European Commission's definition. The main factors defining an enterprise as an SME are (i) staff headcount and (ii) either turnover or balance sheet total, as specified in the table below:

Table 1: SME definition

| Company<br>category | Staff headcount | Turnover | or | Balance sheet total |
|---------------------|-----------------|----------|----|---------------------|
| Medium-sized        | < 250           | ≤€50 m   |    | ≤€43 m              |
| Small               | < 50            | ≤€10 m   |    | ≤€10 m              |
| Micro               | < 10            | ≤€2 m    |    | ≤€2 m               |

<sup>&</sup>lt;sup>1</sup> http://ec.europa.eu/growth/smes/business-friendly-environment/sme-definition en

<sup>&</sup>lt;sup>2</sup> Following the H2020 Work Programme 2016-2017, "Access to Risk Finance" definition, midcaps are companies with 250 to 3000 employees





Further requirements on the European Commission's SME definition can be found at: https://ec.europa.eu/growth/smes/business-friendly-environment/sme-definition/

A legal entity will be considered **a mid-cap** (250-3,000 employees) if it complies with the European Commission's and the European Investment Bank definition at: https://www.eib.org/en/about/priorities/sme/index.htm \*EU recommendation 2003/361/EC.

Any applicant commits itself:

1) to have at the moment of the submission of the application, or at the latest by the kick-off of the AE activities (corresponding to the entry into force of the Standard Agreement), the necessary stable and sufficient resources to implement the DigiFed AE,

2) to guarantee that its organisation is not in any situation, which would exclude them from receiving financial support (including pending financial procedures concerning frauds or inappropriate management or undue previous appropriation of funds from other funding programmes),

3) not to cumulate the DigiFed funding with other forms of financial support for the same work (i.e. exclusion of double funding case)

#### 3.3 Ethical issues

DigiFed complies with the European policies regarding data protection and privacy and respects fundamental ethical issues particularly those outlined in the European Code of Conduct for Research Integrity".

Each AE is responsible to respect European policies regarding data protection and privacy in particular to be GDPR compliant.

All data that are involved (collected, generated, strored) into an Application Experiment or that are processed in an AE must be GDPR compliant and therefore completely anonymized beforehand.

For more information on ethical issues, please consult the documentation provided by the European Commission: http://ec.europa.eu/research/participants/portal/doc/call/h2020/h2020-msca-itn-2015/1620147-h2020\_-\_guidance\_ethics\_self\_assess\_en.pdf.

All applicants have to confirm that their if proposal does or does not have ethical issues by selecting the relevant check-boxes in the proposal template. If you suspect that you have to answer "Yes" to any of the questions in the template, please contact a Digifed Partner for guidance the issue.

The DigiFed consortium may check during the evaluation of a proposal if this declaration is in line with the contents of the proposal itself and reserves itself the right to contact the companies for clarification and eventually take necessary steps depending on the ethical issues..

#### 3.4 Financial Support to Third parties rules

As per European Commission's rules, companies have the possibility to participate in different open calls during DigiFed entire duration. In that case, the maximum possible financial support per DigiFed Third Party is limited to **100 000 €.** Financial support to third party is called cascade funding.





As per European Commission's rules, financial support will not be awarded to individual legal entities that have already received more than 100 000 € via open calls (Financial support to Third parties = FSTP = Cascade funding) from H2020 I4MS (https://i4ms.eu/) and/or SAE (https://smartanythingeverywhere.eu/) projects.

DigiFed will receive assistance from the European Commission to cross-check if an organization that has been shortlisted for getting funding under the third open call of DigiFed has already received funding via an open call from any H2020 I4MS and SAE project and to ensure that no funding is allocated to an Application Experiment in case an entity exceeds the above threshold (including any DigiFed potential funding).

The limited amount does not include any EC contribution that your organization receives or has received via an EUfunded project (within FP7 or H2020) as a fully associated beneficiary. Participation as a beneficiary does not affect the participation in DigiFed open calls.

As per European Commission's rules, financial support will not be awarded for work that was previously or is currently funded under any other (Regional, National or EU) programme.

### 3.5 Funding of proposals

The funding of proposals will follow the Financial Support to Third Party rules detailed in the previous section (§3.4).

The **maximum funding** per Application Experiment per Third party – under the condition that the above-mentioned limits to FSTP do not apply - is **55** k€ for each Third party for one Application Experiment, at a funding rate of **70%** of the budget. This refers to the base configuration, more details in section §3.6.

If the above-mentioned limits do apply to the applying company, the maximum funding is dependent on the sum of the already received funding via open calls from any H2020 I4MS and SAE project of the involved third party.

Each **application experiment budget** will include justifications of cost and resources. The total European Commission available funding per Application Experiment will represent 70% of the total cost involved by selected company(-ies).

The amount of financial support will be calculated on the basis of the estimated costs. Each AE will include an implementation plan including milestones and deliverables, and a cost estimate justifying the costs and resources in relation to the implementation plan. The industrial third party will be funded 70% of their respective cost. The selected company will receive pre-financing of up to **50%** of their respective total funding amount. The remaining payments (50%) will be made at the end of the AE upon successful completion of milestones and/or deliverables.

The **AE budget** must follow H2020 rules, among them:

- It must respect the limit of **15%** for specific subcontracting tasks that neither the DigiFed partners nor the Third Party can carry out
- The Third Party shall not make a profit from the EC funding
- The funding rate is **70%** of the budget.

It is strongly recommended that travel costs for dissemination in the "other direct costs" budget are included in the budget.

Please consider that all budgeted costs must comply with the applicable national law on taxes, labor and social security and must be in compliance with the rules and conditions laid out in Council and Parliament decisions relevant to the H2020 framework programme, in particular - but not exclusively - "REGULATION (EU) No 1290/2013 OF THE EUROPEAN PARLIAMENT AND OF THE COUNCIL of 11 December 2013"





Provisions for possible future losses or charges, exchange losses, costs related to return on capital, costs reimbursed in respect of another Union action or programme, debt and debt service charges and excessive or reckless expenditure are **ineligible costs** and **cannot be included** into the budget.

The expected duration of an Application Experiment is 9 to a maximum of 12 months.

Regardless of the planned duration of the Application Experiment, it has to be finished by the end of the DigiFed project (31.12.2022), including any possible delays.

#### 3.6 Partners in Application Experiment

DigiFed partners support selected third parties in different ways and roles. In general, a successful Application Experiment is built on a collaboration of the following parties depending on the AE type (see §3.9):

| Single AE   | Twin AE   |
|---|---|
| <ul> <li>BASE CONFIGURATION</li> <li>One Third party (= the applying company)</li> <li>DigiFed Competence partner</li> <li>Cascade funding partner (CEA) max</li> <li>55 k€ max of cascade funding for the applying company</li> </ul>  | <ul> <li>BASE CONFIGURATION <ul> <li>Two Third parties (= the applying company(ies))</li> <li>DigiFed Monitoring partner</li> <li>Cascade funding partner (CEA)</li> <li>Each applying company receives a max of 55 k€ of cascade funding each</li> </ul> </li> </ul> |
| <ul> <li>ADDITIONAL POSSIBILITIES</li> <li>For two Third parties to build one single proposal in joint collaboration and get 55 k€ max of cascade funding to be shared by the two applying companies.</li> <li>To get support for 2 DigiFed Technologies (from 2 DigiFed partners)</li> </ul> |   |

For SINGLE AE with two third parties, one of the third party will have to be designated as the coordinator of the project at application phase. Its duties are i) to ensure that the proposal is in line with the companies expectations and targets, ii) to make sure that both the admistrative declarations and the ethical issues section (§4) of the proposal are fully completed on behalf of the two third parties, iii) to be the priviledged contact with DigiFed monitoring partner.

For Twin AE, one of the third parties applying will have to be designated as the coordinator of the project at application phase. Its duties are i) to ensure that the proposal is in line with the companies expectations and targets, ii) to make sure that both the admistrative declarations and the ethical issues section (§4) of the proposal are fully completed on behalf of the two third parties, iii) to be the priviledged contact with DigiFed monitoring partner.

DigiFed partners support and serve as points of contact for the third party(ies) during the creation of the proposal until the closure of the call.

DigiFed competence partners will support and serve as a single point of contact for the third party(ies) during the execution of the selected single AEs. They will relay the AE status to the cascade funding partner and the validation of the defined milestones.

Digifed monitoring partner will ensure the project follows its work plan as a single point of contact for the third party(ies) during the execution of the selected twin AEs. They will relay the AE status to the cascade funding partner and the validation of the defined milestones.

DigiFed cascade funding partner (CEA) is in charge of the cascade funding (FSTP) payment to the third party(ies) following the payment schedule described in the standard contract and the validation of the milestones and associated deliverables by the competence or monitoring partners, depending on the AE type.





### 3.7 Available technologies and DIH services

DigiFed offers access to the following advanced technologies and industrial platforms:

- AVL (Austria): Integrated and Open Development Platform.
- Budapest University of Technology and Economics (Hungary): LEDSBESMART platform and Versatile Realiability Tester
- CEA (France): platform for Cybersecurity of hardware systems. SigMa Fusion<sup>™</sup> Platform for environment perception.
- Digital catapult (UK): Access to 5G and IoT network testbeds, IoT benchmarking, Access to Compute, Machine Learning and AI Ethics capability
- *Ikerlan (Spain):* Ikerlan Konnekt solutions (industrial cybersecurity, dependable embedded systems, I&C technologies, HW & communication systems)
- *Ljubljana University (Slovenia):* Cloud DevOp; Electrical blockchain switch; Big Data analtics tools; IoT protyping & Sensing Automation system; 5G experimentation; Quality intervention monitoring system
- *STMicroelectronics (France):* STM32 PU & STM32 CMU enabling innovation appplications for Smart industry, smart city, smat home abd smart things
- STMicroelectronics (Italy): Physical digital transformation support with hardware & software tools for fast prototyping.

DigiFed offers the following innovation management services:

- Blumorpho (France): Support in go to market strategy & innovation management; access to further funding and relevant training to attract private investors.
- Digital Catapult (UK): Innovation support (technical, business, open innovation) and training events.
- Ljubljana University (Slovenia): Designing effective digital solutions with stakeholders (SEROI+ methodology)
- Minalogic (France): Five level of services on (I) Strategy positioning, (II) R&D innovation process, (III) Business development, (IV) Finance access and (V) Skills and training capacity building.
- Steinbeis-Europe-Zentrum (Germany): Development of Innovation strategies, especially in SMEs; Aid for the internationalisation as well as support for EU funding and projects

For more information about these offers, their technical capabilities, please consult the website (https://digifed.org/explore/) or contact the relevant partner(s) – with the help of our helpdesk at info@digifed.org.

#### 3.8 Kinds of Application experiment

DigiFed supports the following two kinds of application experiment:

- **CPS software-intensive project**: building a system solution using existing programmable CPS software core platforms provided by DigiFed partner or external companies and complementary advanced software technologies. The cascade funding provided by DigiFed will cover the development by the SMEs and the service. While the expertise provided by DigiFed partner is already covered by the project budget. The outcome of this kind of experiment will be a software prototype/demonstrator running on a pre-identified platform (e.g. from DigiFed partner or an external company).
- System integration project: building a system solution using existing software and hardware components. This kind of AE will require enablement for access to a broad range of competencies (product technical experts, design kits, API, etc.). Funding will cover the development costs related to the hardware-software integration. The outcome of this kind of experiment will be an integrated system prototype /demonstrator.

### 3.9 Application experiment type: single AE # twin AE





Two types of application experiments are supported by DigiFed in this open call:

#### • SINGLE AE:

#### Base configuration

- a single AE involves one Europan company that brings an idea of innovation, a clear market vision, looking for technical support to validate the concept. The maximum cascade funding grant available for the company is 55 k€.
- o One DigiFed technical partner bring the technical expertise to the European company.
- This partnership **must be cross-border** and thus implies that the company and the DigiFed partner are from different countries.
- One DigiFed innovation partner is associated, bringing its expertise on innovation management and business.
- Together with CEA as cascade funding parner, they will constitute a dedicated consortium, committed together through the signed standard and specific AE agreement, if selected. The European company will then be funded through the cascade funding, based on the workplan and payment schedule conditions defined in the standard and specific AE agreement.

#### Additional possibilities

- Two Third parties can build one single proposal in joint collaboration under the following conditions:
  - The proposal will get **55 k€ max of cascade funding** that has to be shared by the two applying companies.
  - cross-border implies that at least the leading company is of different country than the DigiFed partner
- The applying company can get two DigiFed technology support, from two DigiFed partners under the following conditions:
  - The applying company will get 55 k€ max of cascade fundning.
  - Cross-border implies that the applying company is (at least) from different country than the leading DigiFed technology partner.

#### • TWIN AE:

- a twin AE involves two European companies from different countries (cross-border condition) that are associated to build together a proposal and to manage it to its realization, if selected. The maximum cascade funding grant available will be 55 k€ for each company.
- Company #1 brings an idea of innovation, a clear market vision and needs complementary expertise to validate the concept.
- Company #2 brings the complementary expertise to realize the prototype.
- o One DigiFed innovation partner is associated, bringing its expertise on innovation and business.
- One DigiFed partner is associated to monitor the good realization of the project, based on the defined workplan.
- Together with CEA as the cascade funding partner, they will constitute a dedicated consortium, committed together through the signed standard ans specific AE agreement, if selected. . Both European companies will receive cascade funding based on the workplan and payment schedule conditions defined in the standard and specific AE agreement.

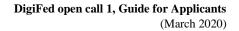
#### 3.10 Technical areas

DigiFed welcomes proposals including, but not limited to, the following fields:

cyber-physical & embedded System / Smart application: software complexity, artificial intelligence, connectivity, application-specific semiconductor technologies, heterogeneous integration and smart miniaturized systems, additive manufacturing, micro and nano bio-systems, energy efficiency of systems.

DigiFed will support companies with low Digital maturity to enter start digital innovation pathway.DigiFed will also support companies with existing digital background to address new digital challenges (e.g. Cybersecurity, AI, etc.)







### 4. Proposal creation and submission

#### 4.1 Registration on the submission portal

Applicants are encouraged to register in the DigiFed proposal submission portal as early as possible: https://digifed.org/open-calls/

This way, DigiFed consortium is aware of the interest of a company in the open call and can support the applicants even if they have not yet contacted a DigiFed partner.

#### 4.2 One stage submission

Proposals for a DigiFed Application Experiment are submitted in a single stage, by submitting a complete proposal through our submission portal. A complete proposal is constituted of two documents:

- Proposal description report: technical description oriented: small document (a dozen of pages) written in English and submitted under pdf format.
- A recorded pitch, business oriented: 5 min recorded video in English.

#### 4.3 Proposal description language and length

The proposal description has to follow the structure of the proposal template provided in Annexe 1 of this document. The template can be downloaded from the open call website as a Microsoft-Word file: https://digifed.org/open-calls/

The proposal has to be written in English. Proposals submitted in any other language will not be evaluated. The proposal has to be submitted under a pdf format.

The proposal should be approximately 10 pages long, not including the title page, the administrative declarations and section 4. (Ethical Issues) of the proposal. Applicants are free to provide limited additional information such as letters of support or additional data or references in the Appendix that does not count to this page count.

#### 4.4 Recorded pitch language and length

The recorded pitch has to follow the guidelines as listed in Annexe 2 of this document. More information is provided during bootcamps and webinars. The webinar will be available on line and recored pitch guidelines can be downloaded from the open call website at https://digifed.org/open-calls/

The recorded pitch must be in English. Pitch submitted in any other language will not be evaluated.

#### 4.4 Support during the creation of the proposal

Applicants are strongly encouraged to contact one of the DigiFed partners in order to get more information on the technologies available, the Innovation management services and advice on how to create a successful proposal prior to submitting.

DigiFed partners are pleased to help applicants with registration, submitting proposals and finding the partner (DigiFed partner for single AE or an external company for Twins AE) that best suit their needs, establish and facilitate contact between third parties and the relevant DigiFed consortium members – and to make sure that the proposal complies to all rules in the open call.

If contacted in time, they can give feedback on certain aspects of a proposal to enable possible improvements to a proposal before it is submitted.

Applicants can contact DigiFed thanks to:

The helpdesk: info@digifed.org





- Direct contact with DigiFed partners
- Participation to Webinar and on-line version
- Participation to Bootcamps
- DigiFed Digital Innovation Hubs events.

Past experience indicates that proposals with engagement before submission are more likely to succeed.

#### 4.5 Submission of proposals

Proposals in DigiFed are submitted through our dedicated proposal submission portal.

Only proposals submitted through this portal before the closure of the call will be evaluated after its closure. Proposals must be received by the closing time and date of the call (**09/06/2020 Tuesday at 5:00pm Brussels Time**). Late proposals or proposals submitted to any other address or by any other means will not be evaluated.

If one of the documents is missing (pdf file or video), the proposal will be considered as uncomplete and therefore will not be evaluated.

If you discover an error in your proposal you can at any time - provided the call deadline has not passed - submit a new version of your proposal in our portal. Only the last version received before the call deadline will be considered in the evaluation.

All proposals will be evaluated as submitted; after the close of a call, no additions or changes to received proposals will be taken into account.

Do not wait until the last minute to submit the final version of your proposal. A complete proposal includes the proposal description (pdf document) and the recorded pitch. Failure of your proposal to arrive on time for any reason, including communication delays, is not acceptable as a delay circumstance. The time of receipt of your submission as recorded by the portal system will be definitive.

#### 4.6 Acknowledgement of receipt

The submission of a proposal will be confirmed by the proposal submission system through an automated email.

The acknowledgement of receipt will be emailed to you by DigiFed project (see Annexe 3 of this document).

The sending of an acknowledgement of receipt does not imply that your proposal has been accepted as eligible for evaluation.

# 5. Proposal evaluation and selection

#### 5.1 Admissibility and eligibility check

A proposal is eligible if it complies to the following requirements

- 1. The proposal description is written in English and the recorded pitch is in English
- 2. It was submitted by a legal entity established in one of the countries mentioned in section 3.1 Eligible countries
- It confirms that the "Standard Agreement" on the website has been read and is intended to be signed if the proposal will be selected
- 4. Its content corresponds to the call topic description (in scope/out of scope)
- 5. The proposal is cross-border and the company(ies) are from Eligible countries (see §3.1)
- 6. The company(ies) areStart-up, SME or mid-cap (see definition in §3.2))





A proposal will only be deemed "out of scope" in clear-cut cases when there is no obvious link between the proposal and the scope of the call. If the proposal is partially within the scope of the call, it will be evaluated in any case.

If any of the above criteria do not apply to a proposal, the applicant will be informed about it and the proposal will not be furthered into the evaluation process. In any other case, the proposal will be evaluated as described in the following sections 5.2 and 5.3 of this document.

### 5.2 Proposal evaluation overview

DigiFed project will evaluate proposals received in the open calls in the light of the criteria that govern the European Commission's original evaluation and selection of their projects. All evaluations are carried out in the light of the same basic principles:

- **Excellence**: The proposals selected for funding must demonstrate a high quality in the context of the topics and criteria set out in the call
- **Transparency**: Funding decisions are based on clearly described rules and procedures, and all applicants will receive adequate feedback on the outcome of the evaluation of their proposals
- Independence: Evaluators assess proposals on a personal basis. Evaluators represent neither their employer nor their country.
- Impartiality: All proposals submitted to a call are treated equally. They are evaluated impartially on their merits, irrespective of their origin or the identity of the applicants<sup>3</sup>.
- **Objectivity**: Evaluators assess each proposal as submitted<sup>4</sup> not on its potential if certain changes were to be made.
- Accuracy: Evaluators make their judgment against the official evaluation criteria of the call or topic the proposal addresses, and nothing else.
- **Consistency**: Evaluators apply the same standard of judgment to all proposals.
- Confidentiality: All proposals and related data, knowledge and documents are treated in confidence

| Criteria               | Associated documents   |  |
|------------------------|--|--|
| Excellence             | These 3 criteria will be evaluated through the proposal description (pdf document) |  |
| Impact                 |  |  |
| Implementation Quality |  |  |
| Business Case          | This criteria will be evaluated through the<br>recorded pitch                      |  |

The evaluation of Application Experiment proposals is based on scores given according to four criteria:

The evaluation criteria and the scoring system are described in detail in the next section of this document. The evaluation process in DigiFed follows the three basic steps:

- Three external experts will evaluate all the proposals with regards to the criteria of *Excellence*, *Impact* and *Quality*.
- A business case evaluation will be done through a 5 min recorded pitch posted by the applicant, following requirement provided online, through webinars and bootcamps set-up by DigiFed DIH partners.
- DigiFed evaluation committee will perform a global evaluation of the proposals based on the results of both the technical and business case evaluation, in regards to the criteria of Excellence, Impact and Quality

The external experts are individuals from different sectors: science, industry or academic and with experience in the field of innovation. These experts are internationally recognised authorities in the relevant specialist area and are independent of any member of the consortium and of any proposer. They will also sign a non-disclosure form with DigiFed to ensure the confidentiality of the proposals.

<sup>&</sup>lt;sup>4</sup> This includes the input made during phone interview for the business case evaluation as described below



<sup>&</sup>lt;sup>3</sup> In the frame of any restrictions provided for in the call



Each of the three steps, described above will assign a score to each proposal in the following way:

- Each external expert will assign a score between 0 and 5 to each of the criteria mentioned above. The
  assigned scores of the experts will be averaged for each criterion to get one single score for each criteria
- The business case evaluation will assign a score from 0 to 5 to the criteria mentioned above
- DigiFed evaluation committee will assign a score between 0 and 5 to each of the criteria mentioned above.

During DigiFed evaluation & selection meeting, each proposal will be discussed and a consensus formed on the scoring. To achieve a single score for each of the criteria of *Excellence*, *Impact* and *Quality*, the scores by *IEC* and the score of the external experts (which has been combined into a single score for each criterion as described above) will be averaged.

A total score of a proposal is reached by calculation the sum of all individual scores of the evaluated criteria of a proposal. Each criterion is equally weighted. Therefore, the overall maximum score for an experiment proposal is 20.

For a proposal to be considered for funding, each individual score must meet a minimum threshold, which is 3 out of 5 points. The total sum of the individual scores must reach the minimum threshold of 13 points.

#### 5.3 Evaluation criteria and score

The evaluation of Application Experiment proposals will be based on scores given according to four basic criteria: *Excellence, Impact, Quality* and the *business case* of the AE.

The **Excellence** is evaluated according to the following criteria:

- How well does the proposed solution address the digitilization challenge as detailed in the open call text?
- Are the proposed objectives clear and pertinent?
- How well does the proposed solution integrate the required functionalities?
- How intuitive is the technology for the end-users? How easy can the technology be integrated into the environment? How robust is the technology?
- Does it solve specific technological challenges (mobility, communication, etc.)?
- How well does the proposed work integrate the DigFed platform (for SINGLE AE)?
- To what extent is the proposed work ambitious, has innovation potential, and is beyond the state of the art (e.g. ground-breaking objectives, novel concepts and approaches)?
- Is the concept sound and shows a clear plan for the development of a working solution

The **Impact** is evaluated according to the following criteria:

- Does the proposal enhance innovation capacity and the integration of new knowledge of the companies ?
- Are the proposed measures to exploit and disseminate the project results (including management of IPR), to communicate the project, and to manage research data where relevant effective?
- Are any other environmental and socially important impacts, not already covered, relevant?

The Quality and the efficiency of the implementation will be evaluated according to the following criteria:

- How effectively will the Application Experiment be managed? Is the proposed work plan coherent and effective?
- Are Tasks , deliverables, deadlines well defined and adapted to the goals of the proposals?
- Is the allocation of tasks and dedicated resources (e.g. human capital, equipment, person-hours, etc.) appropriate and necessary to perform the scope of the proposal and achieve its objectives?
- Are the costs clearly defined and aligned with the required efforts?
- Have crucial risk (technological and other) to the success of the Application Experiment been identified and how effectively will those be managed.





 Does the third party possess the technical skills and abilities necessary to perform the scope of the proposal?

The **Business case evaluation** of the proposal will be performed through a recorded (pitch) prepared by the company following given recommendations and describing

- Market attractiveness taking into account the market size, growth potential potential market capture for the company (SOM)
- Differentiation (UVP) highlight your unique value proposition unique selling point, compared to the competition
- The business model / go to market explaining what is the market access for the company, what is the plan to address the frist customers, what are the plan for the future business development
- **Quality of the team** describing how the team is qualified for the execution of the business plan.
- Strategic fit for the company explaining what is the strategic coherence of the project for the company.

The scores used during the evaluation process indicate the following with respect to the criterion under examination:

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

#### 5.4 AE selection

The outcome of the evaluation will be a ranked list of all proposals, ordered in descending order by the total score obtained by the proposal.

The final distribution will depend on the received proposals and the DigiFed consortium keeps the right to modify this distribution. Hence, the priority will be given to the best proposals in the areas of CPS and embedded systems.

Depending on the available budget for funding, the available resources for the technological offer of the DigiFed consortium members, the number of eligible and fundable proposals in the call, the appropriate number of proposals - based on this ranked list - will be selected for funding. Whilst normally the highest-ranked proposals will be selected for funding, there might be objective reasons (as mentioned above) for objecting to a specific third party. In this case, the choice may pass to the next-ranked proposal.

The selected proposals will be reported the DigiFed project officer of the European Commission for a final granting decision.

### 5.5 Feedback to applicants

After the evaluation of the proposals, all applicants will be informed if their application experiment was accepted or not. The first call notifications are planned to be released on 3 August, 2020.

In case a proposal is selected, the applicant will receive a short summary of the evaluation outcome along with further information about the upcoming steps. In case a proposal is not granted, they will receive a full evaluation report, including an extended summary with the main remarks of the evaluation to allow the improvement of the proposal for future submissions. In any case, it is allowed to resubmit proposals to Digifed's further open calls.





### 6. Additional information

#### 6.1 Call Helpdesk

For further information on the call, contact our helpdesk:

Email: info@digifed.org

### 6.2 The individual Property Rights

All partners involved in a funded and implemented Application Experiment will sign a standard agreement before the Application Experiment starts. All information of whatever nature and in whatever form or mode of communication, which is disclosed by a Party to any other during the implementation of the Application Experiment and which has been explicitly marked as "confidential" at the time of disclosure, or when disclosed orally, has been identified as confidential at the time of disclosure and has been confirmed and designated in writing within fifteen (15) calendar days from oral disclosure, is "Confidential Information" and shall not be disclosed to any other third party.

Ownership of the developed product of an Application Experiment will remain with the third party. In case any IP is transferred or developed during the implementation of the Application Experiment, a bilateral contract between the involved parties will be concluded to define the exploitation rules.

For all questions on intellectual property rights please see the standard agreement which is available on the website.

# 7. Checklist for a successful proposal

Please consider this checklist as a helpful tool to maximize the chances of your proposal to be successful:

- 1. **Register in our portal** and **contact a DigiFed Partner for support.** Past experience indicates that proposals with engagement before submission are more likely to succeed. Each applicant should contact a networking partner as soon as possible for guidance and register in our portal.
- 2. Does your planned work fit with the call for proposals? Check that your proposal does indeed address the topic in this open call.
- 3. Is your proposal eligible? The eligibility criteria are given in chapter 3 of the guide for applicants. Make sure that you satisfy the formal participation requirements (eligible country, written in English)
- 4. **Readability:** Check that your proposal printable and all information (especially in charts, figures etc.) is readable.
- 5. Budgetary limits: Check that you comply with the budgetary limits.
- 6. Did you use the current template? All proposals have to be based on the current proposal template available on the website.
- 7. Is your proposal complete? Have you completed all mandatory questions?
- 8. **Does your proposal answer all requests/comments?** Proposals should be precise, concise and should answer to requested questions. Omitting requested information will almost certainly lead to lower scores in the evaluation.
- 9. **Did you maximize your chances?** The DigiFed consortium members can give valuable feedback during the creation of your proposal that can significantly increase the quality of a proposal
- 10. Have you submitted your proposal before the deadline? It is strongly recommended not to wait until the last minute to submit the proposal. The deadline is June 9<sup>th</sup>, 2020 at 5 p.m. Brussels time





# **ANNEXE 1: Proposal template**



#### **Call Information**

Identifier: DigiFed01 call

**Project full name:** Digital Innovation Hubs Federation For Large Scale adoption of digital technologies by European SMEs **Acronym:** DigiFed

Grant agreement number: 864266

Deadline: 09.06.2020, 5 pm (Brussels time)

Title: [Application Experiment Name]

Acronym of the project: [Application Experiment Short Name]





SINGLE AE



For a **Single AE proposal**, please fulfil below the column "Single AE". For a **Twin AE proposal**, please fulfil below the column "Twin AE" for both companies.

|  | Single / Twin AE   |   |  |
|--|--|---|--|
| Single AE<br>One company   | Company #1:<br>coordinator   | Company #2  |  |
| <b>Participant organisation/company</b> :<br>[Organization/Company name]                         | <b>Participant organisation/company:</b><br>[Organization/Company name]                          | Participant organisation/company:         [Organization/Company name] |  |
| <b>Organization/Company Number:</b>  | <b>Organization/Company Number:</b>  | <b>Organization/Company Number:</b>                                   |  |
| [Organization/Company number or  | [Organization/Company number or  | [Organization/Company number or national                              |  |
| national equivalent if available]  | national equivalent if available]  | equivalent if available]  |  |
| Country:   | Country:   | Country:  |  |
| Contact person name:   | Contact person name:   | Contact person name:  |  |
| [Name]   | [Name]   | [Name]  |  |
| <b>Contact person phone number:</b>  | <b>Contact person phone number:</b>  | Contact person phone number:  |  |
| [ <i>Phone number</i> ]  | [ <i>Phone number</i> ]  | [Phone number]  |  |
| Contact person email:  | Contact person email:  | Contact person email:   |  |
| [Email address]  | [ <i>Email address</i> ]   | [Email address]   |  |
| Contact person position in the   | Contact person position in the   | Contact person position in the  |  |
| organization/company:  | organization/company:  | organization/company:   |  |
| [Position in company]  | [Position in company]  | [Position in company]   |  |
| <b>Contact partner:</b>  | <b>Contact partner:</b>  | Contact partner:  |  |
| [DigiFed Partner contacted prior to  | [DigiFed Partner contacted prior to  | [DigiFed Partner contacted prior to                                   |  |
| submission]  | submission]  | submission]   |  |
| <b>DigiFed platform partnership #1:</b><br>[Insert the Digifed platform you would<br>like to use | <b>DigiFed platform partnership #1:</b><br>[Insert the Digifed platform you would<br>like to use | ļ   |  |
| <b>DigiFed platform partnership #2:</b>  | <b>DigiFed platform partnership #1:</b>  |   |  |
| [Insert the Digifed platform you would   | [Insert the Digifed platform you would   |   |  |
| like to use  | like to use  |   |  |

Please make sure that your information here is the same that you entered in the submission portal.

Email address to which the Acknowledgement of Receipt should be sent:

[insert]

Note:

All parts of this document in **dark blue color** or **red** are explanatory guidance notes. Please delete these guidance notes and replace with your own text. Do not delete headings, subheadings and tables.

 $\langle 0 \rangle$ 



### Administrative declarations

Please answer the following questions. Failure to answer them might render the proposal ineligible to be selected for funding.

- In case of a SINGLE AE with one applying company, to be fulfilled by the applicant
- In case of a TWIN AE or SINGLE AE with two applying companies, to be fulfilled by company #1 (coordinator) on behalf of the two companies.

| 1. Funding will not be awarded to individual legal entities that have already received more than 100.000 € via open calls (Financial Support to Third Parties) from H2020 I4MS and SAE projects.                          |  |  |  |  |
|---|--|--|--|--|
| a) We confirm that we understand this and are required to declare any such funding:   |  |  |  |  |
| □ Yes □ No  |  |  |  |  |
| If you select "No" or do not select anything here, the proposal might be ineligible to be selected for funding.<br>Please contact DigiFed helpdesk for guidance if you do not know how to answer this.                    |  |  |  |  |
| b) Have you previously or are you currently receiving funding via open calls (Financial Support to Third Parties) from H2020 I4MS and SAE projects?   |  |  |  |  |
| ☐ Yes ☐ No  |  |  |  |  |
| If yes, please state the total amount of receiving funding:   |  |  |  |  |
| If you select "Yes" please declare the total amount of funding you have received (or will receive) through the respective open calls. Please contact DigiFed Helpdesk for guidance if you do not know how to answer this. |  |  |  |  |
| If appropriate or necessary, please add a comment here, explaining your answer to the questions above.  |  |  |  |  |
| 2. We confirm that the proposed work has not previously, or is not currently been funded under any other (Regional National or EU) programme:   |  |  |  |  |
| □ Yes □ No  |  |  |  |  |
| If you select "No" or do not select anything here, the proposal might be ineligible to be selected for funding.<br>Please contact DigiFed Helpdesk for guidance if you do not know how to answer this.                    |  |  |  |  |
| If appropriate or necessary, please add a comment here, explaining your answer to the question above.   |  |  |  |  |
|   |  |  |  |  |
| 3. We confirm that the company "name of the company" does exists, is not bankrupted and have or will have the necessary stable and sufficient resources to implement the DigiFed Application Experiment,                  |  |  |  |  |
| □ Yes □ No  |  |  |  |  |
| If you select "No" or do not select anything here, the proposal might be ineligible to be selected for funding.<br>Please contact DigiFed helpdesk for guidance if you do not know how to answer this.                    |  |  |  |  |
| If appropriate or necessary, please add a comment here, explaining your answer to the question above.   |  |  |  |  |
|   |  |  |  |  |
| 4. We confirm that we have read the "Standard Agreement" and that we intend to sign it in the event the Application Experiment is selected for funding:   |  |  |  |  |
| 4. We confirm that we have read the "Standard Agreement" and that we intend to sign it in the event the   |  |  |  |  |





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# List of abbreviations

| AE   | Application Experiment   |
|------|--|
| CPS  | Cyber Physical Systems   |
| FSTP | Financial Support to Third Party   |
| I4MS | ICT innovation for Manufacturing SMEs (https://i4ms.eu/)                   |
| IP   | Intellectual Property  |
| SAE  | Smart Anything Everywhere initiative (https://smartanythingeverywhere.eu/) |
|      |  |
|      |  |





# Proposal Summary

Mandatory (maximum of 2000 characters including spaces) Describe your proposal high level. It has to be clear which challenge your proposal is focusing. Please note that this information may be used for dissemination purposes





#### 1. Excellence

#### 1.1 Concept and objectives

Describe the specific concept and objectives for the application experiment, which should be clear, measurable, realistic and achievable within the duration of the application experiment (max. duration 12 months – regardless of its duration, each AE has to be finished by the end of DigiFed on 31.12.2022, including all possible delays in the experiment). Objectives should be consistent with the expected exploitation and impact of the application experiment.

#### **RECOMMENDED 0.5 PAGE**

#### 1.2 Proposed Innovation description

Give an overview of the progress beyond state of the art, the potential innovation and the targeted CPS/embedded system product:

Describe how you ensure to be GDPR compliant and how to respect security and privacy

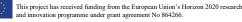
• Describe the advance your proposal would provide beyond the state-of-the-art, and to what extent the proposed work is ambitious. You may indicate the TRL<sup>5</sup> of your experiment (start and target at the end of the project).

What is the main differentiator of your proposition compare to the state of the art or existing product?

- Describe the innovation potential, which the proposal represents for your company(ies). Where relevant, refer to products and services already available on the market. Please refer to the results of any patent search carried out.
- Describe the CPS/Embedded system targeted product, highlighting the innovation / added value regarding the market offer. What is your previous experience with this solution?
- Describe the measures to respect European policies regarding data protection and privacy, how you ensure to be GDPR compliant.

RECOMMENDED 2 PAGES

<sup>&</sup>lt;sup>5</sup> https://ec.europa.eu/info/funding-tenders/opportunities/portal/screen/support/faq/2890





### 2. Impact

#### 2.1 Industrial relevance & potential impact

Describe the industrial relevance of your project, potential impact (turnover, employment, market size, IP management sales, return on investment and profit), exploitation plan and business view.

Provide insights on how your project will contribute to

- Potential impact on industry, on your market, including the improvement of the innovation capacity of your company(ies)
- Socially and environmental or other impact not already mentioned.

Please be specific and provide only information that applies to the proposal and its objectives. Wherever possible, use quantified indicators and targets.

RECOMMENDED 1.5 PAGES.

#### 2.2 Business plan summary

The business evaluation will be performed via a recorded pitch with guidelines provided on the website **here**, bootcamps , webinar at **weblink**.

What is the market attractiveness of the proposal?

What is the business model? Explain how you will make money with this product or service (revenue model, etc.). Explain your sales and marketing strategy.

Please prepare a brief summary (based on your recorder pitch)

RECOMMENDED 0.5 PAGE.





# 3. Implementation

#### 3.1 Company(ies) description

| Single AE: One applying company  | Single / Twin AE: two applying companies  |
|--|---|
| Provide a brief description of the legal entity (e.g., the type of<br>company, age, size, country, focus domain(s), tech/non-tech,<br>"newcomers" to EU programs or have prior experience), the<br>main tasks and the previous experience relevant to those<br>tasks. Provide also a short profile of the individuals who will<br>be undertaking the work.<br>Describe the needed expertise from the involved DigiFed<br>competences partners.<br>Precise the needed support for innovation management from<br>DigiFed partners. | For each third party, provide a brief description of the legal<br>entity (e.g., the type of company, age, size, country, focus<br>domain(s), tech/non-tech, "newcomers" to EU programs or<br>have prior experience), the main tasks they have been<br>attributed, and the previous experience relevant to those<br>tasks. Provide also a short profile of the individuals who will<br>be undertaking the work.<br>Describe the quality of the consortium as a whole and of the<br>individual proposers, explain the complementarity of the<br>partners.<br>Precise the needed support for innovation management from<br>DigiFed partners. |

RECOMMENDED 1 PAGE to 1.5 PAGES in case of two applying companies AE proposal.

#### 3.2 Workplan including the project duration

#### Please provide the following:

- Brief presentation of the overall structure of the work plan and timing of the work plan (6-12 months recommended)
- List of necessary competencies, DigiFed services that could be used or that are targeted
- Please add a GANTT-Chart to visualize the duration of the individual WPs over the duration of the Application Experiment.
- Detailed work description (use the template provided below; 1 table per WP)
- Please add a list of deliverables using the provided table.

#### **RECOMMENDED 2 PAGES**

| Work package number:                 | Start Date: |  |
|--------------------------------------|-------------|--|
| Work package title:                  |             |  |
| Planned Person-months <sup>6</sup> : |             |  |

| Objectives |  |  |  |
|------------|--|--|--|
|            |  |  |  |

<sup>&</sup>lt;sup>6</sup> In case of more than one participating company, please assign values for all involved participants here.





Description of work (where appropriate, broken down into tasks)

**Deliverables** (brief description and month of delivery)

Table 1: List of Deliverables

| Deliverable<br>(number) | Deliverable<br>name | Work<br>package<br>number | Participant<br>Name | Type <sup>7</sup> | Dissemination<br>level | Delivery<br>date |
|-------------------------|---------------------|---------------------------|---------------------|-------------------|------------------------|------------------|
|                         |                     |                           |                     |                   |                        |                  |
|                         |                     |                           |                     |                   |                        |                  |
|                         |                     |                           |                     |                   |                        |                  |
|                         |                     |                           |                     |                   |                        |                  |
|                         |                     |                           |                     |                   |                        |                  |

<sup>7</sup> Use one of the following codes:R: Document, report

DEM: Demonstrator, prototype

DEC: Patents filing, press & media actions, videos, etc. OTHER: Software, etc.



#### 3.3 Justification of planned costs and resources

Please provide a summary of required efforts per WP using the table below. RECOMMENDED 0.5 PAGE

| Participant<br>Name | WP<br>Number | Estimated eligible costs |                        |                           |                       |                    |                             |
|---------------------|--------------|--------------------------|------------------------|---------------------------|-----------------------|--------------------|-----------------------------|
| Traine              |              | Effort<br>(PM)           | Personnel<br>Costs (€) | Other Direct<br>costs (€) | Indirect<br>costs (€) | Total costs<br>(€) | Requested<br>Funding<br>(€) |
|                     |              |                          |                        |                           |                       |                    |                             |
|                     |              |                          |                        |                           |                       |                    |                             |
|                     |              |                          |                        |                           |                       |                    |                             |
|                     | Total        |                          |                        |                           |                       |                    |                             |

In column 'Effort', insert the required person months for the work involved.8

In column 'Personnel Costs', insert your personnel costs for the work involved.

In column '<u>Other Direct costs</u>', insert any other direct costs, for example material or travel costs (technical meetings, dissemination activities, etc.)

In column 'Indirect costs', insert your indirect (overhead) costs, 25 % of all your direct costs.

In column 'Total costs', calculate the sum of all your indicated costs.

In column '<u>Requested Funding</u>', insert your requested EC contribution.

You may request up to 70% of the total costs\*.

Up to 15% of the cascade funding may be used for specific subcontracting tasks that neither the DigiFed partners nor the Third party can carry out. Please provide sufficient justification on what and why you need to subcontract some of your tasks.

\* The maximum funding per Application Experiment is **55**  $k \in at$  a funding rate of **70%** of the budget. Multiple Application Experiments per applicants are possible, with a total maximum funding for all experiments of 100 $k \in$  that the applicant is involved in (through all three open calls)- respecting the limits to FSTP in I4MS and SAE. Please consult our guide for applicants for more details. Further in-kind support – as described in the open call text and the guide for applicants - is provided on top of the funding contribution.

Please consider that all budgeted costs must comply with the applicable national law on taxes, labor and social security and must be in compliance with the rules and conditions laid out in Council and Parliament decisions relevant to the H2020 framework programme, in particular - but not exclusively - "REGULATION (EU) No 1290/2013 OF THE EUROPEAN PARLIAMENT AND OF THE COUNCIL of 11 December 2013"

Provisions for possible future losses or charges, exchange losses, costs related to return on capital, costs reimbursed in respect of another Union action or programme, debt and debt service charges and excessive or reckless expenditure are ineligible costs and cannot be included into the budget.

The maximum total funding that may be allocated to any individual legal entity via open calls from any H2020 I4MS (ICT Innovation for Manufacturing SMEs) or SAE (smart Anything Everywhere) cannot exceed **100.000**  $\in$ . Please consult our Guide for Applicants for more details.

<sup>&</sup>lt;sup>8</sup> You may refer to the Guide of Applicants for further information on these different categories of costs.





### 4. Ethical issues

DigiFed complies with the European policies regarding data protection and privacy and respects fundamental ethical issues particularly those outlined in the European Code of Conduct for Research Integrity".

All data that is brought into an Application Experiment or that is processed in an AE must be GDPR compliant and therefore completely anonymized beforehand.

Please answer the following questions.

Does your proposed work involve:

| 1. Human embryos and foetuses      | Yes 🗌 / No 🗌 |
|------------------------------------|--------------|
| 2. Humans                          | Yes 🗌 / No 🗌 |
| 3. Human cells/tissues             | Yes 🗌 / No 🗌 |
| 4. Personal data                   | Yes 🗌 / No 🗌 |
| 5. Animals                         | Yes 🗌 / No 🗌 |
| 6. Third countries                 | Yes 🗌 / No 🗌 |
| 7. Environment & Health and Safety | Yes 🗌 / No 🗌 |
| 8. Dual use                        | Yes 🗌 / No 🗌 |
| 9. Misuse                          | Yes 🗌 / No 🗌 |
| 10. Other ethics issues            | Yes 🗌 / No 🗌 |

If the answer is 'YES' to any of the questions, please contact DigiFed project at **info@digifed.org** or one DigiFed partner, for guidance on the issue.

For more information on ethical issues, please consult the document provided by the European Commission:

http://ec.europa.eu/research/participants/portal/doc/call/h2020/h2020-msca-itn-2015/1620147h2020\_-\_guidance\_ethics\_self\_assess\_en.pdf





# **ANNEXE 2: Recorded pitch contents**

Contents of the 5 min pitch in English

- Company profile, products and taregted market
- Introduction of the management team
- Selected technology building block and taregeted use case
- Definition oft he product to be developed
- Expected differentiation competitive advantage
- Business model market size and expected growth fort he company go to market strategy
- Targeted customers and go to market strategy
- Expected level of demonstration at the end oft he project potential customer demonstration





# **ANNEXE 3: Acknowledgement of receipt**

Dear xxx,

Thank you for submitting your proposal for consideration as Application Experiment in the H2020 project DigiFed.

The evaluation will take place in the next few weeks. You will be notified as soon as possible after this whether or not your proposal has been successful.

DigiFed consortium as a whole would like to thank you for your interest in our activities.

Yours sincerely,

