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D2.4 Open call documents KIT & third-party financing rules for OC2

28-05-2026



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D2.4 Open call documents KIT & third-party financing rules for OC2

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ABBREVIATIONS & ACRONYMS

AID4SME	enabling SMEs to develop AI and DATA solutions through support of a Community of Practice and low-TRL and high-TRL playgrounds
FAQ	Frequently Asked Questions
OC	Open Call

Executive Summary

The report **D2.4 Open call documents KIT & third-party financing rules for OC2** compiles the documents that formalize the AID4SME Open Call #2 (OC2).

A total of seven annexes is part of the documentation pack:

- Annex 1. Guidelines for Applicants
- Annex 1.1 Challenge Description
- Annex 2. Proposal Template
- Annex 3. Sub-grant Agreement Template
- Annex 4. Declaration of Honour Template
- Annex 5. Consortium Declaration of Honour Template
- Annex 6. SME Declaration Template
- Annex 7. Application Form Read-only

Furthermore, a dedicated **Frequently Asked Questions** (FAQ) section is included as an annex to this report and is accessible to potential applicants via <https://aid4sme.eu/open-call-2/>.

The AID4SME Open Call #2 represents the second and last cascade funding opportunity promoted by the AID4SME consortium. With an indicative budget of EUR 2 350 000.00, up to 12 projects will be funded and may apply to a maximum contribution of up to EUR 200 000.00 (70% funding rate).

1 Introduction

The report **D2.4 Open call documents KIT & third-party financing rules for OC2** compiles the documents that formalize the AID4SME Open Call #2 (OC2). The AID4SME Open Call #2 documents kit is available at <https://aid4sme.eu/open-call-2/>.

The documentation pack is composed of the following annexes:

- [Annex 1. Guidelines for Applicants](#), establishes the terms and conditions of the open call, including eligibility criteria, evaluation and selection procedures, contracting process, and other important requirements.
- [Annex 1.1 Challenge Description](#), provides a detailed description of the challenges within this second call.
- [Annex 2. Proposal Template](#), represents the description proposal to be submitted as annex to the application form.
- [Annex 3. Sub-grant Agreement Template](#), outlines the rights and obligations of the selected entities within this call.
- [Annex 4. Declaration of Honour Template](#), declares that all Open Call rules and processes are accepted by the third-party company legal representative and ensure that no conflict of interest will be involved in the open call process and cascade funding rules.
- [Annex 5. Consortium Declaration of Honour Template](#), declares that the Open Call rules and processes are accepted by the entities that are part of the selected consortium (when applicable).
- [Annex 6. SME Declaration Template](#), determines the status of the SMEs selected within the open call.
- [Annex 7. Application Form Read-only](#), mimics the application form to be filled in by lead beneficiary within the deadline.

Additionally, a **Frequently Asked Questions** (FAQ) section ([Annex 8](#)) has been added to this report. Those questions are available at <https://aid4sme.eu/open-call-2/> in a dedicated section (FAQ). Note that the final list of FAQs may differ as this section will be updated with questions sent to the Open Call Helpdesk, as well as asked during the informative webinars.

The AID4SME Open Call #2, with an indicative budget of EUR 2 350 000.00, was launched on 15 May 2026 and will run until 15 July 2026. Up to 12 projects will be funded and may apply to a maximum contribution of up to EUR 200 000.00 (70% funding rate). Selected projects will be enrolled in a 14-month AID4SME Program #2 with a start date on 01 November 2026.

Annex 1. Guidelines for Applicants



AID4SME | Open Call #2

Annex 1. Guidelines for Applicants

Version 1.0 – 2026.05.13

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1. What is AID4SME?

AID4SME is a European Project under the Horizon Europe Programme (HORIZON-CL4-2024-DIGITALEMERGING-01) – Grant Agreement no. 101189562. The 36-month project kicked-off in December 2024 and counts 16 partners from multiple sectors and European countries.

AID4SME aims to facilitate Small and Medium-sized Enterprises (SMEs) in developing combined Artificial Intelligence (AI) and data solutions for large scale resource optimisation challenges for industries that have significant impact on the objectives of the Green Deal.

A minimum 20 SMEs, selected through 2 open calls, will receive FSTP to develop these solutions with the support of a Community of Practice (COP). The ambition is to create a COP that will continue after the project lifetime. AID4SME brings together 9 technology blocks and low-TRL (technology readiness level) playgrounds from 4 scientific partners, to educate and support the SMEs. Additionally, 4 large industry partners (from automotive, whitegoods, battery and energy sector) provide real-life large scale resource optimization challenges that require combined AI and data solutions, and high-TRL playgrounds to integrate and demonstrate the solutions. AID4SME offers an open platform that is flexible to bring in challenges from outside the consortium. AID4SME provides the infrastructure and learning environment that enable the SMEs to solve the challenges, demonstrate solutions and grow into impactful enterprises. The technology blocks cover a wide area of AI and data technologies for the full cycle of data collection, creation of insights, decision support and automation. These technologies have the potential to have a significant impact on the Green Transition and boost EU competitiveness for industries. AID4SME will collaborate with the AI-on-Demand platform to enrich its repository with the AID4SME tools and framework, while it is open to deploy the tools/frameworks already available on the AI-on-Demand platform for new use cases. AID4SME will assess the impact of the developed technologies on Green Deal objectives and on social and human aspects. AID4SME brings along partners who are experienced in re-skilling and up-skilling of SMEs and applying standardization as an enabler for exploitation. The wide geographical coverage, with partners and Digital Innovation Hubs (DIHs) from across Europe, ensures maximum impact.

This document is specifically designed for Open Call #2.

2. What is the AID4SME - Open Call #2 offer?

The *Open Call* is the competitive process by which eligible applicants apply to have access to the AID4SME programme.

Applications to the Open Call will be accepted from **15 May 2026 until 15 July 2026 (17:00 Brussels time)**. After the selection is completed, selected applicants will be invited to sign the sub-grant agreement and enter the AID4SME Programme #2.

The AID4SME Programme #2 is organised in 4 stages of 14 months. Stage 1 - Plan from 01 November 2026 to 31 November 2026, Stage 2 - Development from 01 December 2026 to 30 June 2027, Stage 3 - Test from 01 July 2027 to 31 August 2027, and Stage 4 - Assessment from 01 September 2027 to 31 December 2027.

During these phases, beneficiaries will have the support of a mentor to monitor project progress and facilitate communication with technical partners.

The programme will select up to 12 applications, each addressing one of the challenges/topics defined in [section 3](#), providing a maximum contribution of EUR 200 000.00, to be paid in form of lump sums at the end of periods 1, 2 and 3 (30% + 40% + 30%) ([section 7.2](#)).

The indicative budget for AID4SME - Open Call #2 is EUR 2 350 000.00.

Relevant links and contacts

- Project website: <https://aid4sme.eu/>
- Open call application form: <https://www.f6s.com/aid4sme-oc-2>
- Contact us: aid4sme_ocs_helpdesk@f6s.com

3. Challenges of the AID4SME - Open Call #2

The AID4SME - Open Call #2 invites potential applicants ([section 4.1.1](#)) to submit proposals that addresses 1 of the 10 challenges within the following 4 domains (Table 1):

- Domain 1: Combined AI and Data solutions for Data Collection
- Domain 2: Combined AI and Data solutions for creation of Insights
- Domain 3: Combined AI and Data solutions for Decision Support
- Domain 4: Combined AI and Data solutions for Automation

Table 1. AID4SME - Open Call #2 domains and challenges

Domain	Code	Challenges
Combined AI and Data solutions for Data Collection	C1.1	Augmented sensing solution
Combined AI and Data solutions for creation of Insights	C2.1	Product-production Digital Twins
	C2.2	Automated monitoring hygiene inspection for refurbishment
	C2.3	Energy system Digital Twin decision support tool
Combined AI and Data solutions for Decision Support	C3.2	Automated machine selection for parts production
	C3.3	Battery production digitalwork instructions & skill capturing
	C3.4	Automated warehouse and internal logistics management
Combined AI and Data solutions for Automation	C4.1	Smart energy management of unplanned machine downtime
	C4.3	Semi-automated EV battery disassembly for recycling
	C4.4	Co-bot refrigerator door assembly solutions

For each specific challenge, proposed solutions must target a set of defined Key Performance Indicators (KPIs) from resource optimization to social impact.

A full description of AID4SME - Open Call #2's challenges is available at **Annex 1.1 Challenge description** (<https://aid4sme.eu/open-call-2/>).

4. Who can apply and how?

4.1. Types of applicants

The AID4SME - Open Call #2 is looking for Technology Developers to develop, test and validate Artificial Intelligence (AI) and Data solutions in the framework of the AID4SME project.

4.1.1. Eligible applicants

Eligible applicants for the AID4SME - Open Call #2 are:

- **Start-ups, and Micro, small and medium-sized enterprises (SMEs)** working on related technologies.

Relevant notes:

- Please consult the [EU SME Definition](#) for details on what constitutes an SME.
- A signed version of the Declaration of Honour and the SME Declaration (when applicable) will be requested during the contract preparation phase.

4.1.2. Consortium requirements

The AID4SME - Open Call #2 is accepting applications from single or consortia of up to 2 eligible applicants led by a SME and/ or Start-up ([section 4.1.1](#)).

The following entities may also participate as a consortium member without requesting financial support:

- **Industry organisations** providing the SMEs / Start-ups use-cases and high-TRL playgrounds for solution testing and validation;
- **Integrators/ engineering services** that support the SMEs / Start-ups in integration of the solutions;
- **Research institutions, research infrastructures, non-profit organisations and charitable (scientific) foundations and public research centres.**

The AID4SME is mandated to only provide financial support to SMEs and start-ups ([section 4.1.1](#)), meaning that only these entities can apply for funding within the AID4SME - Open Call #2.

4.1.3. Eligible countries

Eligible countries that may receive funding through this Open Call are legal entities from:

- European Union Member States with a valid VAT.
- Horizon Europe associated countries (those that have signed an agreement producing legal effects with the European Union (EU) as identified in the Horizon Europe Programme Guide) according to the updated list published by the European Commission (EC). For the AID4SME project, the reference version at the time of the signature of the Grant Agreement (GA) is **v3.1 (11-07-2024)**¹.

Note that at the time of signing the AID4SME GA (November 2024), the United Kingdom and Switzerland had not yet signed an association agreement producing legal effects.

¹

https://ec.europa.eu/info/funding-tenders/opportunities/docs/2021-2027/common/guidance/list-3rd-country-participation_horizon-euratom_v3.1_en.pdf

The AID4SME - Open Call #2 follows the rules applied by the EC for the R&D Programme Horizon Europe in terms of geographical coverage, eligibility, and exclusions, which take precedence.

4.1.4. Multiple submissions

The AID4SME - Open Call #2 will accept a **maximum of 1 application** per eligible applicants ([section 4.1.1](#)) and consortium entities ([section 4.1.2](#)). The limit applies whether the entity applies alone or in a consortium. Research institutions, research infrastructures, non-profit organisations and charitable (scientific) foundations and public research centres are not limited by the maximum number of applications.

In case an entity submits more than **1** application, **only the application submitted last will be eligible**. This also applies to entities that have submitted more than 1 application, however, addressing different challenges ([section 3](#)).

4.2. Types of projects

The AID4SME - Open Call #2 aims to fund innovative projects that address the challenges identified in [section 3](#). Applicants are required to select one of the challenges presented in Table 2.

Table 2. Challenges of the AID4SME - Open Call #2

Code	Title	Proposals to be selected
C1.1	Augmented sensing solution	Up to 2
C2.1	Product-production Digital Twins	
C2.2	Automated monitoring hygiene inspection for refurbishment	
C2.3	Energy system Digital Twin decision support tool	
C3.2	Automated machine selection for parts production	
C3.3	Battery production digitalwork instructions & skill capturing	
C3.4	Automated warehouse and internal logistics management	
C4.1	Smart energy management of unplanned machine downtime	
C4.3	Semi-automated EV battery disassembly for recycling	
C4.4	Co-bot refrigerator door assembly solutions	

The AID4SME - Open Call #2 will look to ensure a balanced distribution of applications among challenges. Specific rules are defined in [Section 5](#).

4.3. Funding conditions

Any eligible applicant ([section 4.1.1](#)), applying individually or as part of a consortium ([section 4.1.2](#)), will only be considered for funding once.

Each application will apply for 70% funding of its eligible total project costs (funding rate). **Note that only eligible applicants ([section 4.1.1](#)) may apply for funding.**

Each application may receive a maximum contribution of up to EUR 200 000.00. The maximum contribution requested must cover 70% of the project total costs (including indirect costs). All applications will be required to provide a justification of the planned costs and resources of the project.

Funding is foreseen to support the following categories of costs:

- Personnel costs resulting of the development and management activities of the third-party projects;
- Purchase costs necessary to carry out the activities e.g. hardware purchases;
- Travel and subsistence to attend meetings and events.

The type of costs that may be reported include personnel costs, purchase costs (travel and subsistence, equipment - depreciation cost only -, and other direct costs), and indirect costs (25% of personnel and purchase costs). **Subcontracting is not eligible in this open call.**

Funds will be disbursed in lump sums at the end of **periods 1, 2 and 3** ([section 7.2](#)) and pending the achievement of agreed milestones and deliverables.

4.4. Application process

The F6S platform will be the single entry point for all applications to the AID4SME - Open Call #2. Interested applicants should register at the AID4SME F6S page (<https://www.f6s.com/aid4sme-oc-2>). The relevant links and timings for the application process are provided in Table 3, but are subject to change.

Table 3. Application Process and Timeline

Phase	Description	Timeline
Application	Fill in and submit application including: • Application form on F6S [https://www.f6s.com/aid4sme-oc-2]. • Proposal Template (<i>Annex 2. Proposal template</i>)	Launch date: 15/05/2026 Submission deadline: 15/07/2026 (17h00 CEST)
Eligibility check	AID4SME Consortium performs internal checks the eligibility criteria of the applications	16/07/2026 to 20/07/2026
In/out challenge scope check	AID4SME Consortium performs challenge scope checks of eligible applications	20/07/2026 to 27/07/2026
Application evaluation	An evaluation board reviews eligible and within scope applications, scoring them based on the evaluation criteria. Preliminary rank is defined and highest ranked applications are interviewed by the AID4SME consortium (further details in section 5).	21/07/2026 to 18/09/2026
Online interviews	Challenge and playground (when applicable) owners interview top-ranked applications from the expert evaluation, scoring them based on the interview evaluation criteria.	31/08/2026 to 04/09/2026
Announcement of the results	All applicants receive a written letter about approval or rejection of their project. The successful projects start the onboarding phase in the AID4SME Programme.	18/09/2026

The submission date for applications is final. All other dates, including those of the programme, may be subject to change.

4.5. Other application requirements and considerations

- **Submission:** Applications must be submitted via <https://www.f6s.com/aid4sme-oc-2>. Any other submission method will not be accepted.
- **Complete application:** All mandatory questions must be answered and all requested documents must be uploaded. Incomplete applications will be disqualified.
- **Accept terms:** Applicants must agree to the application's terms and conditions.
- **English language:** All applications and programme communication must be in English.
- **Document format:** Unless otherwise agreed, all documents in all phases must be submitted electronically in PDF format without printing restrictions.
- **Deadline:**
 - Failure to submit the application by the submission deadline, regardless of cause (e.g., network issues, multiple browsers or windows), is not acceptable as an extenuating circumstance. It is recommended to apply well before the deadline.
 - Resubmissions are possible provided the call deadline has not passed, but are only guaranteed if requested at least 2 business days before the deadline via support@f6s.com.
 - The deadline may be extended only in case of unforeseen F6S platform technical issues. All applicants will be notified of the new deadline.
- **Review future documents:** Applicants are encouraged to get familiar with the documents that will be required in the contracting phase (see [Section - Contracting Phase](#))
- **Notifications:** Applicants are encouraged to enable F6S notifications for the programme in their profile settings to ensure communications regarding their application are received.
- **Applicants list:** A full list of applicants containing their basic information will be created for statistical and transparency purposes, and shared with the European Commission.
- **AID4SME Open Call #1:** Entities funded within AID4SME Open Call #1 are not eligible under AID4SME Open Call #2.
- **Binding information:** In the unlikely occurrence of a contradiction between the information provided via the OC channels (e-mail, webinars or other means) and the information included in the GfA, the latter is binding.

5. How will applications be evaluated and selected?

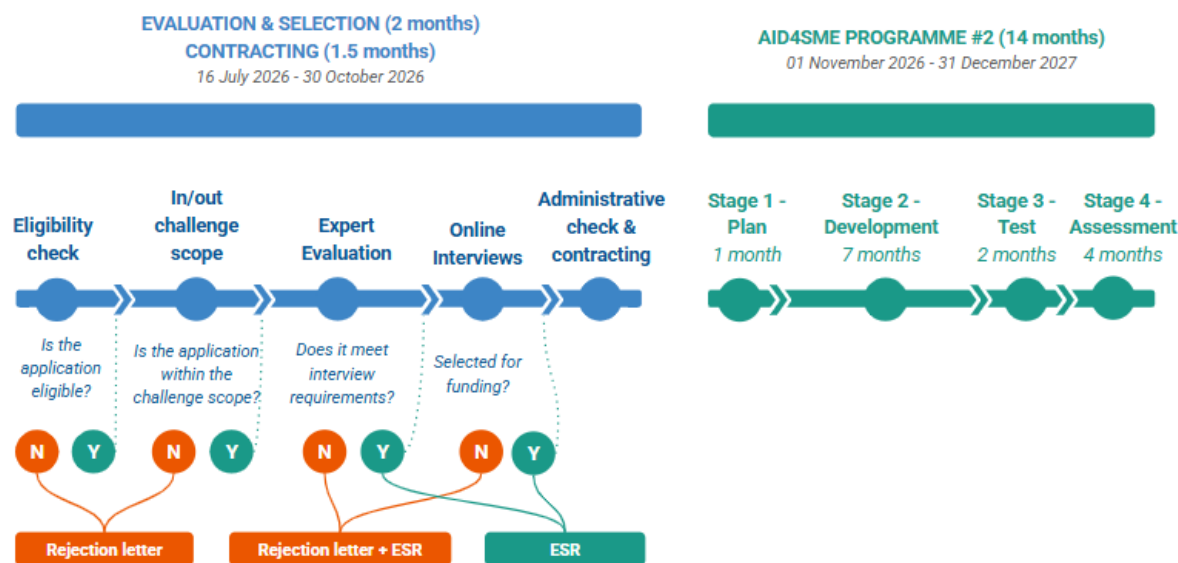


Figure 1. AID4SME Open Call #2 remote evaluation and selection process, and AID4SME Programme #2.

AID4SME consortium reserves the right to request at any moment of the process additional information and/or documentation to clarify any doubts regarding the eligibility of the applicant(s) and/or the application.

5.1. Eligibility check

An initial eligibility verification will be done to filter out and discard non-eligible applications. An application is only considered eligible if it meets **all the eligibility criteria and requirements** listed in [Section 4](#), related with: eligible applicant(s) ([section 4.1.1](#)), consortium ([section 4.1.2](#)), countries ([section 4.1.3](#)), multiple applications ([section 4.1.4](#)), type of projects ([section 4.2](#)), funding ([section 4.3](#)), language, documentation, and other application requirements ([section 4.4](#)).

The eligibility check enables the establishment of a shortlist of applications to be verified in the next step of the evaluation process: **in/out challenge scope check** ([section 5.2](#)). Applications marked as non-eligible (for not meeting one or more of the eligibility criteria) will receive a rejection letter with a justification.

5.2. In/out challenge scope check

The in/out challenge scope verification will be done to filter out and discard out-of-the-scope applications. An application is only considered within the challenge scope if the proposal description indicated in the application form clearly addresses and aligns with the scope of the selected challenge ([section 3](#)). **Note that the proposal template will not be read as part of this verification process.**

The in/out challenge scope check enables the establishment of a shortlist of applications to be evaluated in the next step of the evaluation process: **expert evaluation** ([section 5.3](#)). Applications marked as out-of-the-scope (for not meeting the challenge scope) will receive a rejection letter with a justification.

5.3. Expert evaluation

The expert evaluation board is a collective body composed of individual members with relevant experience in the AID4SME domains and external to the AID4SME consortium, having signed and duly agreed in advance a written commitment of confidentiality and absence of any conflicts of interest that might influence the impartial and objective analysis and evaluation of all submitted proposals.

5.3.1. Evaluation criteria & scoring

Each application will be reviewed by a minimum of two experts from the expert evaluation board. Applications will be scored against the criteria depicted in Table 4.

Table 4: Criteria applied during the expert evaluation phase of the AID4SME - Open Call #2.

Criteria Name	Description
Criterion 1 - Novelty & Innovation (30% weighting)	1.1 Methodology • The extent to which the project's concept advances the current state-of-the-art • Quality of the expected project outcomes • Demonstrated level of project novelty and innovation potential 1.2 Technical description of the proposed solution • Clear description of the technical capabilities and requirements of the proposed solution and the specific problem it is designed to solve • Identification of the current Technology Readiness Level and supporting evidence of its application that justifies the current technology maturity • Scientific publications related to the proposed solution 1.3 Alignment with the selected AID4SME challenge
Criterion 2 - Impact (30% weighting)	2.1 Contribution to the AID4SME ecosystem and to strengthening the competitiveness and growth of the sector/industry • The extent to which the project contributes to the AID4SME ecosystem and objectives, as well as on the applicant • The extent to which the project contributes to strengthening the competitiveness and growth of the industry by developing research/ innovations that meet the needs of European and global markets 2.2 Exploitation plan and Intellectual Property Rights • Quality of the planned activities/ measures to promote the project, and to exploit and disseminate the project results (including management of IPR) • Assessment of any IPR license and the extent to which the AID4SME consortium will be able to use/ integrate the proposed solution 2.3 Impact of the proposed solution on green alignment, social and environmental sustainability

Criteria Name	Description
Criterion 3 - Implementation (20% weighting)	3.1 Work plan • Description of planned implementation activities and the contribution to tasks of each beneficiary • Relevance of proposed deliverables and milestones to measure achievement of results • Relevance of main critical risks (<i>i.e., likelihood and impact</i>) and quality of proposed mitigation measures 3.2 Budget • Clear identification and solid justification of the expected project costs • Rationale behind total person-months (full-time equivalent) allocated to the project, as well as to each stage
Criterion 4 - Team (20% weighting)	4.1 Competencies of the core team • Demonstrated expertise, experience and skills of the core team to guarantee a successful project implementation • Demonstrated gender balance within the core team 4.1 Capacity of entities and consortium (if applicable) as a whole • Description of entity(ies) technological and operational capacity to deliver • Demonstrated commitment to achieving the project's objectives

Table 8 (*item 'Score, Expert'*) defines how individual criteria will be scored. The minimum threshold for each criterion will be **3 (three) out of 5 (five)**, while the overall score threshold will be **9 (nine) out of 15 (fifteen)**. Applications that do not meet the minimum thresholds (per criteria or overall score) will be excluded from the programme. After the individual scoring by the expert evaluation board, the Open Call Management Team will:

- Check for large differences (over 2 points per criterion) between evaluators.
- If differences exist, evaluators meet to discuss and agree on scores (consensus meetings).
- If an agreement is not reached, another expert may be invited to provide a third assessment.

Note that proposals that have passed through the eligibility criteria and in/out challenge scope checks may be discarded based on the expert assessment within this phase ([section 5.1](#) & [section 5.2](#)).

5.3.2. Ranking

Applications will be ranked in individual lists per challenge ([section 3](#)) based on their overall score, which is calculated from the average scores given by the evaluators. If multiple applications have the same overall score, the following tie-breaking criteria will be applied in this order:

1. Criterion 1 - Novelty & Innovation
2. Criterion 2 - Impact
3. Criterion 4 - Team
4. Criterion 3 - Implementation

5.4. Interview

Table 8 (*item 'Score, Expert'*) defines how individual criteria will be scored. The minimum threshold for each criterion will be **3 (three) out of 5 (five)**, while the overall score threshold will be **9 (nine) out of 15 (fifteen)**. Applications that do not meet the minimum thresholds will be excluded from the programme.

The top-ranked applications of the expert evaluation phase ([section 5.3](#)) will be invited to an online interview. The interviews aim to understand the project concept and alignment to selected challenges, team skills, competence and expertise, and willingness to exploit the results. The interview format, evaluation and scoring, and final ranking process is as follows:

Interview selection & format:

- The top-3 applications from the remote evaluation are invited to a 30-minute online interview.
- Applicants present their project (15 minutes) and answer questions from the playground (when applicable) and challenge owners (15 minutes).
- Applicants are required to use the provided slide presentation template for the interview.

The AID4SME consortium reserves the right to invite a maximum of 5 applications per topic to the interview phase, particularly if the overall scores from the expert evaluation do not substantially differ.

Evaluation & scoring:

- Playground (when applicable) and challenge owners evaluate the application and information conveyed in the interview based on the criteria defined in Table 5.
- Interview scores replace the previous expert scores ([section 5.3](#)).
- Failure to meet these or uphold the original application contents leads to the rejection of the application.
- Additional written questions may be requested.

Table 5: Criteria applied at the interview phase of the AID4SME - Open Call #2.

Criteria Name	Description
Criterion 1 - Project concept & alignment (40% weighting)	1.1 Technical description of the proposed solution • Clear description of the technical capabilities and requirements of the proposed solution and the specific problem it is designed to solve • Identification of the current Technology Readiness Level and supporting evidence of its application that justifies the current technology maturity 1.2 Alignment with the selected AID4SME challenge
Criterion 2 - Team (30% weighting)	2.1 Competencies of the core team • Demonstrated expertise, experience and skills of the core team to guarantee a successful project implementation 2.1 Capacity of entities and consortium (if applicable) as a whole • Description of entity(ies) technological and operational capacity to deliver

Criteria Name	Description
Criterion 3 - Exploitation plan & IPR (30% weighting)	3.1 Exploitation plan and Intellectual Property Rights • Quality of the planned activities/ measures to exploit and disseminate the project results (including management of IPR) • Assessment of any IPR license and the extent to which the AID4SME consortium will be able to use/ integrate the proposed solution

Final ranking of applications:

- Playground (when applicable) and challenge owners discuss and agree on the scores.
- Projects are ranked by their overall score per challenge.
- Ties are broken by prioritising scores from the Expert Evaluation ([section 5.3](#)).

All applicants at all stages of the evaluation will be informed about the result of their evaluation along with an Evaluation Summary Report (ESR).

5.5. Appeals

Within three (3) working days of receiving (1) a rejection letter informing the application as non-eligible or (2) an ESR of non-acceptance, an applicant may submit a request for an appeal if they believe the results of the eligibility checks have not been correctly applied, or if they feel that there has been a shortcoming in the way their application has been evaluated.

All requests for appeal must be sent to the Open Call Management Team to aid4sme_ocs_appeals@f6s.com and must:

- Focus on aspects concerning the evaluation of the application (e.g. admissibility or eligibility checks, in/out checks, evaluation procedure, etc), not their merits.
- Clearly describe the complaint.
- Be received within the time limit (3 working days) from the reception of a rejection letter considering the application as non-eligible or the ESR information letter delivered.
- Sent by the entities' legal representative that has also submitted the application.

Note that the evaluation is carried out by highly qualified experts. AID4SME will neither question nor interfere with their original evaluation. Mere repetitions of the content of the application or disagreements with the result or reasoning of the technical evaluation will not be considered.

6. What happens after selection?

Selected applicants will be invited to the contracting phase, where administrative and financial details and documents are verified and validated. Furthermore, to carry out mandatory Know Your Customer (KYC) checks, proof of residency and proof of ID from one or more members of the selected entity(ies) is required.

The steps of this phase are (see Table 8 for complementary information):

1. Inclusion of comments (if any) provided in the Evaluation Summary Report as part of the sub-grant agreement (contract - Annex 3).
2. Validation of the entities based on the provision of the following documentation:
 - Formal proof of the entity's legal existence and tax activity.
 - Proof of the SME status, including the SME Declaration Form (Annex 6).
 - Declaration of Honour, for all participating entities, signed by the legal representative of the entity (Annex 4).
 - Consortium Declaration of Honour, signed by the legal representative of each consortium partner (Annex 5).
3. Signing of the sub-grant agreement between AID4SME Consortium represented by its Open Calls Coordinator (F6S EU Tech Innovation Network Designated Activity Company) and the Lead Beneficiary.

Additional considerations:

- A valid VAT is mandatory.
- The sub-grant agreement (contract) is final and cannot be altered.
- Electronic digital signatures are required for signed documents (unless otherwise agreed).
- Deadlines for document submission will be provided, and will normally be concluded within two weeks. Failure to complete the negotiation in time will result in rejection.

7. What is the AID4SME - Programme #2 and its requirements?

7.1. Programme Stages

The AID4SME Programme includes 4 stages:

1. **Stage 1 - Plan** in M1: beneficiaries will discuss and fine-tune the project's action plan for next stages with mentors and playground owners according to the selected challenge.
2. **Stage 2 - Development** from M2 to M8: beneficiaries will develop the innovative solutions and proceed with integrations at playground owners' sites.
3. **Stage 3 - Testing & Validation** from M9 to M10: beneficiaries will test, validate and demonstrate the solution.
4. **Stage 4 - Solution Assessment & Business Plan** from M11 to M14: beneficiaries will assess and develop a business plan and an exploitation roadmap.

7.1.1. Technical support and mentoring

Each selected project will have at their disposal the following services, infra-structures and mentors from the AID4SME consortium:

- Technical support with expertise in the technologies, engineering integration, testing and validation, and by access to public reusable results
- Technical support with access to the independent testing and validation facilities, so-called low-TRL playgrounds, of the project's scientific partners with specialisations in AI & data technologies for 1) data collection, 2) creation of insights, 3) decision support, and 4) automation.
- Technical and business support from large industry partners that will provide real-life use-cases and will open up their experimental facilities and/or production facilities, so-called high-TRL playgrounds, for testing and validation of the solutions. The industry partners cover the automotive, whitegoods, battery and energy sector.
- An open platform that is flexible to bring in challenges from industries outside the consortium.
- Business support and mentoring to develop business plans and a roadmap to exploitation of the SME solutions.
- Business support with providing the SMEs and Start-ups and their solutions access to the project's connected industry network and DIH networks to increase their market reach, maximise their business opportunities and grow to successful enterprises.

7.1.2. Mandatory deliverables

The following list of deliverables are mandatory:

- **Intellectual Property Agreement** established with playground owners at M4.
- **Test & Validation Report** at M10
- **Business plan and exploitation roadmap** at M14.

7.2. Programme review

7.2.1. Review summary

Each project will go through 3 reporting periods linked to installments, each one highlighting the end of a period (Table 6).

Table 6. AID4SME - Program #2 - Review and payments summary

Period	Item	Description
Period 1	Requirement	Action Plan ^(a)
	Result	Payment of 30% of the maximum contribution grant ^(b)
	Period covered	M1
Period 2	Requirement	Progress Report 1 ^(a)
	Result	Payment of 40% of the maximum contribution grant.
	Period covered	From M2 to M8
Period 3	Requirement	Progress Report 2 ^(a)
	Result	Payment of 30% of the maximum contribution grant.
	Period covered	From M9 to M14

a) Templates to be provided by the AID4SME consortium.

b) 10% of the calculated amount is provided as compensation for the work performed during M1, whereas 90% represents a pre-financing payment. The pre-financing amount remains the property of the AID4SME until the final payment.

Reports must be submitted within 7 working days after the end of each period. Representatives of the beneficiary may present their work and answer questions during a review meeting.

After approval of the submitted reports and within **5 working days**, the beneficiary should send the relevant payment request document.

In case a project fails to either deliver the required report or the submitted report is rejected, the lead beneficiary will have additional **7 working days** to submit the pending report or an updated version. If after this period, the lead beneficiary fails to deliver the report or the updated version is again rejected, the corresponding installment will be suspended until the next period. Repeated failure in the subsequent period will result in the contract termination.

8. What else is important to know?

8.1. Intellectual Property Rights (IPR)

Solutions developed and results achieved by the third parties belong to the third parties. Applicants will remain the sole owners of their respective IPRs and retain the IPR for their solutions.

Regarding the evaluation and the review processes, each evaluator will sign an Agreement including confidentiality clauses before receiving access to the applications database to protect the applicants' intellectual property and sensitive non-disclosed information.

8.2. On conflicts of interest

Applicants must not have any actual and/or potential conflict of interest with the AID4SME selection process and during the project implementation. All cases of conflict of interest will be assessed case by case.

8.3. Ethical issues

AID4SME complies with the fundamental ethical issues particularly those outlined in the "European Code of Conduct for Research Integrity".

- All applicants must submit a self-assessment ethics questionnaire, available in the Proposal Template.

- If the applicant confirms the existence of potential ethical issues, they must contact the AID4SME Helpdesk for guidance, as required.
- The AID4SME will verify the declaration's consistency with the application contents and may contact applicants to resolve any ethical issues.
- Applications that fail to properly address ethical issues or inadequately deal with privacy aspects will be rejected.

8.4. Data protection

In order to process and evaluate applications, and manage project implementation, the AID4SME consortium will need to collect Personal and Industrial Data.

- F6S Network Ireland Limited will act as Data Controller for data submitted through the F6S platform for these purposes. Please see our privacy policy [here](#).
- A Data Protection Officer (DPO) has been appointed by F6S generally, to ensure compliance with data protection regulations, such as the General Data Protection Regulation (GDPR), and that personal data is collected, processed, and stored in a secure manner.
- The F6S platform's system design and operational procedures ensure that data is managed in compliance with the General Data Protection Regulation (EU) 2016/679 (GDPR).
- Each applicant will accept the F6S terms to ensure compliance. Please refer to <https://www.f6s.com/privacy-policy> to review the F6S platform's privacy policy and data security policy.
- Apart from the F6S platform, data will also be stored in the F6S Google Drive, and in the project repository on Sharepoint managed by the project coordinator Katholieke Universiteit Leuven.
- Note that the AID4SME consortium must retain generated data until five years after the balance of the AID4SME project is paid or longer if there are ongoing procedures (such as audits, investigations or litigation). In this case, the data must be kept until their conclusion.

8.5. Confidentiality

Confidentiality obligations:

- Selected applicants are required to maintain confidential any project data, documents, invoices and other materials (in any form) during the implementation of the activities and for 5 years after project completion.
- This confidentiality period can be extended by agreement with the EC and the AID4SME consortium.
- Information shared during the project, whether written or spoken, is only considered confidential if the AID4SME agrees and confirms it in writing within 15 days.
- Confidential information must only be used for project implementation, unless otherwise agreed upon.
- Any information shared during the application stage will be treated as confidential.

8.6. Promotion of the action and ensuring visibility of the EU funding

The beneficiary must promote the project, the AID4SME project and its results, by providing targeted information to multiple audiences (including the media and the public) in a strategic and effective manner and to highlight the financial support of the EC, including on the official third party website. The AID4SME Communication team will guide and support these communication activities to selected beneficiaries.

8.7. Checks and reviews

The EC may, at any time during the implementation of the sub-project and up to five years after the end of the sub-project, arrange for a check and review activity to be carried out, by external auditors, or by the EC services themselves, including the European Anti-Fraud office (OLAF). The procedure shall be deemed to be initiated on the date of receipt of the relevant letter sent by the EC.

There will be no financial checks, reviews, or audits to check costs, since beneficiaries have no obligation to document the costs incurred for the action. Checks, reviews, and audits will focus on the technical implementation of the action.

9. Relevant links and contacts

The AID4SME Consortium will provide information to the applicants via the F6S page, so that all information (questions and answers) are visible to all participants.

- Project website: <https://aid4sme.eu/>
 - Open call application form: <https://www.f6s.com/aid4sme-oc-2/apply>
 - Contact us: aid4sme_ocs_helpdesk@f6s.com
 - Online Q&A/ discussion board: <https://www.f6s.com/aid4sme-oc-2/discuss>
 - F6S platform support team: support@f6s.com
- (For issues with the submission, resubmission, access to the platform, etc.)*

Relevant Open Call definitions

Table 7. Acronyms & Definitions

Acronym	Explanation/ Definition
AI	Artificial Intelligence
AID4SME	enabling SMEs to develop AI and DATA solutions through support of a Community of Practice and low-TRL and high-TRL playgrounds
AWU	Annual Work Unit
COP	Community of Practice
DIH	Digital Innovation Hub
EC	European Commission
EU	European Union
GA	Grant Agreement
IPR	Intellectual Property Rights
SME	Small and Medium Sized Enterprise
ESR	Evaluation Summary Report
KPI	Key Performance Indicators
KYC	Know Your Customer
TRL	Technology Readiness Level

Table 8. Terms & Definitions

Term	Definition
Applicant(s)	The legal entity or group of legal entities that intend(s) to submit or that submitted an application to the Open Call.
Application Eligibility Criteria	Criteria used to assess if an application can be considered for the open call. Possible values (Yes/No).
Application Eligible or Non-Eligible	Application that is or is not compliant with eligibility criteria.
Application Timestamp	Timestamp of the final submission of an application. If the application is reopened and resubmitted the last date will be considered.
Bank Account Information	Document(s) where the beneficiary provides information of the bank account to which payments will be made during the project implementation.
Beneficiary or 3rd Party	An entity or a consortium that submitted an application to the open call that was accepted to be funded, and have signed, or are in the process of signing, a sub-grant agreement.
Consortium	Set of legal entities that are cumulatively responsible to implement the project as defined in the Grant Agreement signed with the European Commission.
Consortium Declaration of Honour	Declaration where the applicants/ beneficiaries, participating as a consortium, declare they accept all conditions of the open call, acceleration process & programme; and agree - if applicable - on budget share. One CDoH is required for each sub-granted project.

Term	Definition
Contract Deadline	Date and time until when the selected entities need to provide contractual information.
Declaration of Honour (DoH)	Declaration where the applicant/ beneficiary declares they accept all conditions of the open call, acceleration process & programme. One DoH is required for each applicant/ beneficiary.
External Evaluator	Expert hired by the consortium to assist in the evaluation of the Open Call. External evaluators cannot have conflicts of interest and are bound by a confidentiality agreement.
F6S Application Form	Application form available in F6S Platform.
F6S Platform	Platform provided by F6S.
FSTP	Financial support to third parties. Payments made to entities that are not members of the consortium.
FSTP – Lump Sum	Payment made to the third party based on the achievement of a milestone.
Internal evaluation committee	Group of appropriately qualified persons of the consortium partners that are assigned the responsibility of performing evaluations or reviews at any stage of the open call implementation or programme.
Mentor	Person from the consortium that works closely with the beneficiary to foster communication with the consortium and assess progress of the project. The mentor may be part of an evaluation committee.
Open Call	Competitive process to access a Programme.
Open Call and Programme deadlines	The project has planned the programme carefully, but unexpected things can happen. The application deadline is fixed, and will only change if something unforeseen occurs. Other dates, including of the programme, are flexible and may be adjusted as needed, and communicated to all applicants.
Open Call close date	Date and time when applications close.
Open Call selection prioritisation	Rules used to order applications.
Proof of Legal Existence	Company/ organisation register, official journal or other official document per country showing the name of the organisation, the legal address and registration number and a copy of a document proving VAT registration (in case the VAT number does not show on the registration extract or its equivalent).
Proof of SME Status	Proof of the SME condition is required: • If the applicant has been fully validated as an SME on the Beneficiary Register of the EC Participant Portal, the PIC number must be provided. • Provision of the signed (with a valid e-signature) SME Declaration (Annex 6): in the event the beneficiary declares being non-autonomous, the balance sheet and profit and loss account (with annexes) for the last period for upstream and downstream organisations is required. A Status Information Form may be requested, which includes the headcount (AWU), balance, profit & loss accounts of the latest closed financial year and the relation, upstream and downstream, of any linked or partner company.

Term	Definition
	Supporting documents: In cases where either the number of employees or the ownership is not clearly identified: any other supporting documents which demonstrate headcount and ownership such as payroll details, annual reports, national regional, association records, etc.
Reserve List	Eligible applications that were not selected for funding which can be invited in case selected applications do not provide contractual data.
Schedule for payments to Beneficiaries	All payments to beneficiaries are dependent on the successful review of deliverables/ reports at the end of each sprint, and reception by the consortium of the corresponding payment request. All payments will be made with undue delay preferably no later than 30 calendar days after the reception of the financial statement.
Score, Expert	Unless otherwise stated, experts will rank each criterion with marks between 0 and 5. Half point scores are not given. Score values will indicate the following assessments: 0: Fail. The application fails to address the criterion under examination or cannot be judged due to missing or incomplete information. 1: Very poor. The criterion is addressed in an unsatisfactory manner. 2: Poor. There are serious inherent weaknesses. 3: Good. While the application broadly addresses the criterion, there are significant weaknesses that would need correcting. 4: Very Good. The application addresses the criterion well, although certain improvements are possible. 5: Excellent. The application successfully addresses all relevant aspects of the criterion in question. Any shortcomings are minor.
Score, Per Committee	When the evaluation is made by a committee, the average score of each criterion is rounded to two decimal places, before computing the overall score. Overall score is the sum of the scores of each criterion multiplied by the respective weight.
Selected application	Application that was selected to participate in the Open Call Implementation.
SME	An incorporated enterprise that complies with the rules defined by the European Commission to be qualified as an SME ²
SME – Autonomous Enterprise	An autonomous enterprise is not a partner with or linked to another enterprise
SME – Linked Enterprise	Linked enterprises are those that form a group through the direct or indirect control of the majority of voting rights of an enterprise by another or through the ability to exercise a dominant influence on an enterprise.
SME – Partner Enterprise	The enterprise holds a minimum of 25% (Capital or voting rights in another enterprise, or 25% (Capital or voting rights) are owned by another enterprise.
SME Declaration Form	Declaration where the SME status is assessed.

² https://single-market-economy.ec.europa.eu/smes/sme-fundamentals/sme-definition_en

Term	Definition
Sub-grant Agreement	Signed between the Project Consortium, represented by its Coordinator and the beneficiary. The sub-grant agreement will also include the comments (if any) of the application's ESR to the work plan.
Sub-granted Project	The project that has been selected and awarded, implemented according to the approved work plan, and in accordance with the signed Sub-grant Agreement.

Annex 1.1 Challenge Description



AID4SME | Open Call #2

Annex 1.1 Challenges Description

Version 1.0 – 2026.05.13x

Disclaimer

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Domain 1: Combined AI and Data solutions for DATA COLLECTION

Challenge 1.1 Augmented sensing solution

Challenge and context: Forces, stresses, torques, and power are direct indicators of a system's well being. However, these quantities are typically expensive, difficult and intrusive to measure. Digital twins approach within AID4SME can help alleviate these hurdles for use cases inside and outside the consortium. Digital twins offer a paradigm shift where computational models of various complexities are merged in a coherent framework and linked to online measurement data available on a physical system. This paradigm allows for a hyper-realistic representation of process behaviour, enabling novel engineering applications and process improvements, such as virtual or augmented sensors. Augmented sensing uses cheap, readily available, non-intrusive, and robust physical sensors to collect data from the real asset component in a digital twin. The desired, yet unknown, quantities are estimated, resulting in a real-time/online virtual sensor fed with real measurement data enriched with physical insights.

Use case and expected solution: Within the consortium, Arçelik requires an augmented sensing solution for its refrigerator production facility, which undergoes approximately 120 mold changes per month. Each change necessitates manual, iterative adjustments, causing about 60 tons/year of polyurethane waste and about 60 minutes of facility downtime per model change. This results in approximately 160K euros in annual costs due to production capacity loss. The solution will enable accurate monitoring of forces, stresses, or other relevant physical quantities during plastic mold changes in the refrigerator production line. It will provide real-time feedback and predictive insights to reduce manual intervention and iterative adjustments during mold changes, minimize polyurethane waste, and reduce facility downtime. For this industrial high TRL application, Arçelik has foreseen the following Key Performance Indicators (KPIs): (i) First time-right adjustment of the mold; (ii) Reduce facility downtime by 15%; (iii) Decrease annual waste by 3 tons; (iv) reduction in energy consumption per mold change. These KPIs are initial indicative numbers and may evolve during the execution of the projects. Besides this high-TRL application, KU Leuven has technology blocks available at TRL 4 and low-TRL playgrounds to develop and test augmented sensing solutions, specifically for mecha(tro)nic system level dynamics, and model-based augmented sensing in electro-thermo-mechanical applications in the manufacturing industry. For application on the low-TRL research lab playgrounds, the focus will be on the technological development of the augmented sensing solution with TRL 9 together with the SME.

Specification for use case: SMEs are invited to propose a use case leveraging their own technology or solving their problems at hand, which will be further elaborated together with the consortium partners. Inspirational examples can be based on system identification, parameter estimation, force estimation, etc. The consortium offers low-TRL research lab playgrounds as well as one high-TRL industrial application (as detailed above). SMEs applying for this challenge should specify which TRL level they would like to target. For the industrial application, three consortium partners will support SMEs in developing an augmented sensing solution to optimize the mold adjustment phase, targeting difficult-to-measure quantities and ensuring a comprehensive understanding of the manufacturing process. The data will be fed to an AI-based digital twin decision support tool, enabling first-time-right adjustment of the mold by the operator.

Expected solution: Currently, two operators visually inspect specific control points at the end of the production line and perform the necessary operations. The operators decide whether the refrigerator cabinets meet the required quality standards. However, there are no predefined measurement gauges,

objective criteria, or tolerance limits in place. As a result, the process is highly dependent on operator experience and is therefore prone to human error and inconsistency. Cabinets that pass the quality inspection are transferred to the next station for completion of the remaining operations. Non-conforming cabinets are diverted to a separate conveyor line for further inspection, rework, and repair activities. The objective is to implement an automated inspection and control station equipped with advanced sensors and camera systems. When the cabinets arrive at the control point, the sensors and cameras will automatically inspect all predefined quality parameters. The system will analyze and display all inspection results in real time on a monitoring screen, while simultaneously storing all collected data in a centralized database for traceability and further analysis. All inspection criteria, tolerance limits, and quality parameters will be defined in collaboration with the Quality Department of Arçelik.

Key Performance Indicators: Key Performance Indicators (KPIs) should clearly demonstrate the relevance and impact of the proposed solution. They must address at least two of the following dimensions: resource optimisation, Green Deal objectives, and social impact. All KPIs must be SMART (Specific, Measurable, Achievable, Relevant and Time-bound), ensuring they remain quantifiable throughout the project

Resource optimization:

- Operator count from 2 operators to 1 operator for mold adjustment
- First-time-right adjustment of the mold
- Reduce facility downtime by 15%
- Increasing production capacity by 3%
- Decrease annual waste by 3 tons
- Scrap rate decrease 20%
- Annual cost savings: Approx. €160k/year

Green Deal impact

Examples of KPIs adequate for measuring the Green Deal alignment of previous proposals for this challenge:

- First-time-right adjustment of the mold
- Reduce facility downtime by 15%
- Decrease annual waste by 3 tons.
- Product life extension - Increase in mean time between product replacements
- Energy saved - Energy otherwise wasted in start/stop cycles & idling
- Material footprint intensity - Reduction in combined material use
- CO2e avoided - Greenhouse-gas savings

Social impact

- Operator-dependent decision-making will be reduced through AI-supported and data-driven quality control systems.
- Reduction of repetitive manual inspection activities will improve ergonomics and working conditions for operators.
- The solution will contribute to workforce upskilling by increasing the use of digital manufacturing and AI-assisted decision-making tools.

- Reduction in polyurethane waste will support environmental sustainability and decrease the carbon footprint of the production process.
- Lower scrap and rework rates will improve resource efficiency and support sustainable manufacturing practices.
- Reduced downtime and improved production efficiency will strengthen the competitiveness of the European manufacturing industry.
- The project will accelerate the adoption of Industry 4.0 technologies within manufacturing environments.
- Improved traceability and standardized quality control processes will increase product reliability and customer satisfaction.

Domain 2: Combined AI and Data solutions for creation of INSIGHTS

Challenge 2.1 Product-production Digital Twins

Challenge and context: Traditional design cycle paradigms in manufacturing have been optimised to their limits, and further gains are expected from cross-stage optimisation through combined AI and Data solutions. Digital information is becoming available in large amounts during different stages of product design, manufacturing, useful life, and recycling. Digital twins enable the collection and comprehensive management of all digital information linked to a unique product asset, exploiting it for added value creation within the same stage at which the data was collected. Leveraging these technologies, the manufacturing industry is on the verge of fully reaching Industry 4.0's digitalization potential, where digital twins play a central role at both the product level and at the production level. Manufacturers are striving to reduce their ecological footprints by minimising energy consumption, material use, and waste. AID4SME is committed to overcoming these challenges for use case owners both inside and outside the consortium.

Use case and expected solution: Inside the consortium, Arçelik operates extruder processes to blend virgin plastic material with plastic scrap. Flaws in the mixing rate can lead to discolouration and cracking, generally caused by high ratios of recycled material. Arçelik seeks a product-production digital twin solution to optimise material mixing ratios based on real-time measurement of visual and mechanical properties of the different plastic source materials. This aims to increase the ratio of recycled plastic, enhancing sustainability while maintaining quality and reducing scrap. Additionally, Arçelik's consumer electronics refurbishing factory, which refurbishes over 50000 products annually, seeks to reduce the amount of refurbished products by combining augmented sensing (cf. challenge 1.1) and a product-production Digital Twin to optimise End-of-Life Product Refurbishment processes by assessing the health and predicting the remaining lifespan of components. For this industrial high-TRL application, Arçelik has foreseen the following activities/Key Performance Indicators (KPIs): (i) improvement of existing sensors and integration of new ones in the extruder machine; (ii) integration of visual, dimensional (width, length, thickness) and mechanical quality control systems into the existing extruder machine; (iii) creation of a digital twin of the developed system; (iv) determination and control of optimal process parameters (screw, speed, mold and barrel temperatures, gear pump pressure, cooling water temperatures, material mixing ratios, etc.) using AI and data analysis; (v) reduction in maintenance costs, waste rates, and energy consumption; (vi) 5% increase (1200 tons) in recycled plastic content in Arçelik refrigerator products; (vii) resolving 95% of quality control issues; (viii) reduction in virgin material usage. This list is not exhaustive but rather indicative. Additional KPIs will be studied and can be integrated to ensure quality outcomes. Besides this high-TRL application, KU Leuven has technology blocks available at TRL 4 and low-TRL playgrounds, namely a fully equipped injection moulding laboratory facility, to develop and test related solutions. This allows to link the manufacturing process to product quality in mecha(tro)nic applications. For application on the low-TRL research lab playgrounds, the focus will be on the technological development of a dedicated product-production simulation framework for injection moulding manufacturing processes.

Specification for use case: SMEs are invited to propose a use case leveraging their own technology or solving their problems at hand, which will be further elaborated together with the consortium partners. Inspirational examples can be based on system identification, quality control, process parameter optimisation, etc. The consortium offers low-TRL research lab playgrounds as well as one high-TRL industrial application (as detailed above). SMEs applying for this challenge should specify which TRL level they would like to target. For the industrial application, the consortium partners will guide and mentor SMEs

to deploy a straight-through digitalization (STD) approach in the challenges. More specifically for this challenge, a product-production digital twin for their extruder processes for blending virgin and regrind plastic and masterbatch materials will be developed and demonstrated at TRL 9 at the high-TRL playground of Arçelik.

Expected solution: Inside the consortium, Arcelik produces plastic sheets using extruder machines. Process parameters, material type, and material ratios are critical factors affecting production quality. Errors in these parameters cause quality defects such as discoloration, cracks, black spots, and similar defects on the plastic sheet. Arcelik is seeking an AI-supported digital twin solution to optimize the production process and material usage using real-time visual and dimensional measurement systems. This solution aims to increase the usage ratio of regrind materials, reduce scrap quantity, decrease energy consumption, and improve sustainability.

Key Performance Indicators: Key Performance Indicators (KPIs) should clearly demonstrate the relevance and impact of the proposed solution. They must address at least two of the following dimensions: resource optimisation, Green Deal objectives, and social impact. All KPIs must be SMART (Specific, Measurable, Achievable, Relevant and Time-bound), ensuring they remain quantifiable throughout the project

Resource Optimisation

Key Performans Indicators (KPIs) for AI-supported digital twin integrated into extruder production line are as follows:

- Increasing the usage ratio of regrind plastic material by 5%
- Reducing the baseline scrap rate by 15%
- Reducing annual energy consumption by 8%
- Reducing operator training time by 30%

Green Deal impact

- Increasing the usage ratio of regrind plastic material by 5%
- Reducing the baseline scrap rate by 15%
- Reducing annual energy consumption by 8%

Social impact EMPTY

- Reducing operator training time by 30%
- Improving operator competencies and technical skills

Challenge 2.2 Automated monitoring hygiene inspection for refurbishment

Challenge and context: Currently, within the consortium, Arçelik handles approximately 70,000 returned or rejected products per year. These products are processed through an automated sorting system in which each unit is scanned via a QR code, providing access to its complete historical documentation and traceability information, including an initial assessment of its refurbishment potential. For products identified as suitable for refurbishment, cleanliness and surface condition are assessed individually using swab tests and ATP detectors, requiring approximately 30 minutes per product. Although effective, this approach is time-consuming, provides limited spatial information, and does not support predictive or scalable, data-driven decision-making. The main challenge, therefore, lies in improving how cleanliness, sanitation, and surface condition are assessed in manufacturing and refurbishment processes, while reducing inspection time and supporting objective refurbishment decisions

Use case and expected solution: This use case focuses on the development of an AI-based decision-making model to objectively determine the cleanliness status and surface condition of manufacturing equipment and parts. The proposed solution combines AI with optical sensing technologies to enable contactless, scalable, and industrially applicable cleanliness monitoring.

Multispectral and hyperspectral vision, together with infrared thermography, can be used for the early assessment of cleanliness and hygiene conditions in manufacturing and refurbishment environments. Hyperspectral imaging (HSI) enables the capture of objective, spatially resolved information on surface contamination, including organic residues (e.g. proteins, fats, and sugars), moisture, and cleaning-agent residues, over large areas and without physical contact. Infrared thermography (IRT) complements this capability by identifying temperature anomalies associated with residual moisture, improper cleaning, or incomplete drying processes. Compared to conventional RGB imaging, multispectral and hyperspectral data provide significantly richer spectral information, enabling more reliable discrimination of surface conditions and contamination types. Currently, LEITAT has the HSI and IRT systems available under laboratory conditions to develop a proof of concept of an AI-based predictive model for cleanliness assessment at TRL 4. Arçelik will provide the industrial playground, contributing real manufacturing equipment and parts to train the models and supporting their validation under real industrial operating conditions

Specification for use case: SMEs are invited to propose a use case that contributes to the development of an AI-based predictive model and demonstrates the capability to integrate and validate HSI- and/or IRT-based decision-making models in industrial environments, bridging laboratory developments and production-line implementation. In particular, the consortium is interested in engaging SMEs capable of providing and deploying multi/hyper-spectral imaging (HSI) cameras or proposed optical sensing technologies for testing and validation under real industrial operating conditions. The consortium offers a low-playground, provided by LEITAT, where optical sensing technologies and AI-based decision-making models can be developed and validated under laboratory conditions, and a high-playground, provided by Arçelik, where the developed solutions can be tested, integrated, and validated under real industrial operating conditions

Expected solution: AI-based, contactless inspection system that assesses the cleanliness and surface condition of manufacturing equipment and refurbished products by combining hyperspectral imaging (HSI) and, where applicable, infrared thermography (IRT). The system will generate objective, spatially resolved cleanliness indicators by detecting organic residues, contamination, moisture, and cleaning-agent residues over large surface areas, supporting automated and data-driven refurbishment decisions. Developed initially as a proof of concept under laboratory conditions at LEITAT (TRL 4), the solution will be integrated

and validated in real industrial environments with TRL 9 at Arçelik, enabling scalable deployment in manufacturing and refurbishment processes while reducing inspection time, costs, and waste.

Key Performance Indicators: Key Performance Indicators (KPIs) should clearly demonstrate the relevance and impact of the proposed solution. They must address at least two of the following dimensions: resource optimisation, Green Deal objectives, and social impact. All KPIs must be SMART (Specific, Measurable, Achievable, Relevant and Time-bound), ensuring they remain quantifiable throughout the project

Resource optimization

- Inspection time per day: Reduced from ~2hours (ATP/swabs) to minutes using AI-based optical inspection
- Labour efficiency: ~126,000 labour hours saved per year (based on 70,000 units)
- Spare part recovery efficiency: Increase to 90% for refurbishment-eligible products
- Annual cost savings: Approx. €13.6 million/year (avg. product value €130)

Green Deal impact

- Impact: Returned products reused ~70,000 units/year refurbished instead of discarded
- Material savings: Approx. 7,000 tonnes of material saved/year (≈100 kg per unit)
- Reduction in consumables: Decrease in swabs, reagents, water, and cleaning chemicals
- Carbon footprint reduction: Lower emissions due to reduced new manufacturing and logistics

Social impact

- Worker safety & ergonomics: Reduced repetitive manual inspections via contactless sensing
- Workforce upskilling: Introduction of AI-based inspection and decision-support tools
- Job quality: Shift from manual inspection tasks to higher-value supervisory roles

Challenge 2.3 Energy system Digital Twin decision support tool

Challenge and context: Grid operators increasingly face grid balancing challenges due to rising energy demand and the growing share of decentralized renewable energy production. To balance power generation and demand, a portfolio of energy storage technologies can be deployed, including electrochemical storage (e.g., batteries, hydrogen technologies) and thermal energy storage. Thermal storage can play a significant role by shifting heating or cooling loads, improving sector coupling, and reducing peak electricity demand. Moreover, with the advances in thermophotovoltaic (TPV) technology that provides conversion from heat to electricity, thermal storage enables output of both electricity and heat. However, energy conversion and storage equipment, including both electrical and thermal systems, incur capital and operational expenditures that ultimately affect the final price of delivered energy. Optimal sizing and integration of local renewable generation, electrical storage, and thermal energy storage are therefore essential to achieving an economically efficient and flexible energy system. Due to numerous variables, such as time-dependent profiles of energy consumption (electric and thermal), renewable generation, storage state dynamics, and dynamic pricing signals, and their nonlinear interdependencies, optimal system configurations cannot be derived analytically. This challenge calls for AI and data-driven solutions to optimally size, coordinate, and control distributed energy resources, including microgrids with integrated thermal and electrical storage.

Use case and expected solution: The expected solution should enable the microgrid operator to determine the optimal sizing of local energy assets to reliably meet both electrical and thermal heating energy demands. In addition, it should incorporate advanced energy management capabilities that control grid assets operation in a way to stabilize the grid, reduce the overall costs, and enable the microgrid to offer ancillary services. The proposed sizing and real-time operational strategy should minimize total energy costs, reduce capital expenditures for both electrical and thermal energy storage systems, and limit curtailment or wastage of renewable energy, while maximizing the value of distributed resources through intelligent grid control.

Specification for use case: A Digital Twin (simulation model) of local energy systems and real-life measurements of energy consumption will represent a core of the playground. The provided Digital Twin enables simulation of thermal and electrical energy balance over a desired time and observing economic results as a function of equipment sizes and prices. The digital twin will be used to experiment and test microgrid control algorithms for different pricing scenarios. The main focus of the scenarios will be on inclusion of novel thermal energy storage solutions and provision of ancillary grid services. The selected third party is expected to have experience with provision of ancillary (grid) services and is expected to contribute with the following:

- Develop an optimization algorithm for optimal sizing of a microgrid components using a microgrid Digital Twin
- Develop a microgrid grid energy control algorithms using predictions of heat and electricity needs
- Implement and test the developed solutions in a digital environment with real world data and for different scenarios
- Demonstrate operational scenario of ancillary grid services together with the use of thermal storage solution

Key Performance Indicators: Key Performance Indicators (KPIs) should clearly demonstrate the relevance and impact of the proposed solution. They must address at least two of the following dimensions: resource optimisation, Green Deal objectives, and social impact. All KPIs must be SMART (Specific,

Measurable, Achievable, Relevant and Time-bound), ensuring they remain quantifiable throughout the project

Resource optimisation

- Decrease of investment for energy storage system for the reference scenario (% reduction in CAPEX for energy storage),
- Decrease costs of electricity and heat for the reference scenario utilizing predictive energy storage and smart energy management.

Green Deal impact

- Improve local consumption of renewable energy (% increase in renewable energy self-consumption),
- Ancillary service fulfillment rate (%), share of requested ancillary service energy/power that is successfully delivered. $(\text{Delivered service} / \text{Requested service}) \times 100$
- Ancillary service activation success rate (%), percentage of service requests that are activated correctly and on time

Domain 3: Combined AI and Data solutions for DECISION SUPPORT

Challenge 3.2 Automated machine selection for parts production

Challenge and context: Many complex production processes are still partially controlled by operators with highly specialized, tacit knowledge that is difficult to formalize and document, posing risks to product quality, process reliability, and long-term industrial competitiveness if lost. At the same time, shopfloor operations often rely on simple but repetitive manual tasks, such as pick-and-place activities involving movement between workstations, which require coordinated perception, manipulation, and locomotion but are rarely described in a way that enables direct automation. The challenge is therefore twofold: to capture and structure human instructions and operator know-how, and to translate them into executable actions for robotic systems operating in dynamic production environments. In this context, adaptive DWI are essential, as they enable instructions to be both human- and machine-readable and adaptable to operational conditions. The AID4SME framework provides a foundation for addressing these challenges through AI-driven decision support, knowledge representation, and cyber-physical systems. As a representative use case, the project focuses on enabling a humanoid robot to learn and execute a simple pick-and-place task with locomotion between workstations based on human-provided instructions. This use case represents the execution layer of decision support, where high-level decisions—such as machine selection for parts production—are translated into actionable instructions and physically carried out on the shopfloor by the robot. In this way, the project demonstrates a practical pathway for bridging human expertise, AI-based decision-making, and autonomous robotic execution in real production environments.

Use case and expected solution: The challenge addresses the need to formalize and digitalize operator knowledge and translate it into actionable instructions for robotic systems. Capturing and representing this knowledge requires combining structured knowledge capture methodologies with AI-based approaches capable of linking human actions with process context. The use case focuses on a practical and demonstrable scenario, where a humanoid robot learns and executes a simple pick-and-place task involving locomotion between workstations based on human-provided instructions. The proposed solution leverages imitation learning and reinforcement learning to enable the robot to learn from demonstrations and structured DWI, transforming human-readable instructions into robot-executable workflows. The approach is supported by theoretical and methodological developments, including knowledge representation, instruction modelling, and AI-based learning strategies. The resulting system will demonstrate that a humanoid robot can reliably execute a defined task in an industrial setting, enabling improved process consistency, reduced dependency on manual execution, and a scalable pathway for integrating human-centric AI and humanoid robotics into smart manufacturing systems.

Specification for use case: The use case focuses on enabling a humanoid robot to autonomously perform a simple pick-and-place task involving locomotion between two or more workstations in a production environment at LTH Castings. The humanoid robot is to be provided by the solution provider and is not part of the playground infrastructure. The task includes object detection, grasping, transportation, and precise placement, while navigating safely between predefined locations on the shopfloor.

The system shall support the following functional specifications:

- Task definition and execution: Pick an object from a defined source location (e.g., bin or fixture), Walk to a target workstation using predefined or dynamically generated paths, Place the object at a designated position with sufficient accuracy and repeatability
- Instruction handling: Input provided as human-readable instructions (text and/or video-based demonstrations), Transformation of instructions into structured DWI, Conversion of DWI into robot-executable action sequences
- Learning and adaptation: Use of imitation learning for initial task acquisition, Use of reinforcement learning for optimisation and robustness, Ability to adapt execution based on environment conditions (e.g., object position variability)
- Perception and navigation: Multi-modal perception using stereo vision (≥ 3 cameras) and LiDAR, Object detection and localisation, Environment mapping and safe navigation between workstations
- Development approach: Initial validation in simulation environment (digital twin of workspace), Gradual transition to real-world deployment (Sim2Real), Use of virtual sensors and synthetic data where applicable.

Expected solution: The resulting system will demonstrate that a humanoid robot can reliably execute a defined task in an industrial setting, enabling improved process consistency, reduced dependency on manual execution, and a scalable pathway for integrating human-centric AI and humanoid robotics into smart manufacturing systems.

Key Performance Indicators: Key Performance Indicators (KPIs) should clearly demonstrate the relevance and impact of the proposed solution. They must address at least two of the following dimensions: resource optimisation, Green Deal objectives, and social impact. All KPIs must be SMART (Specific, Measurable, Achievable, Relevant and Time-bound), ensuring they remain quantifiable throughout the project

Resource optimisation

- Successful execution of the full pick–transport–place cycle
- Task execution speed reaching at least 50% of human baseline performance
- Instruction-to-execution setup time ≤ 4 hours
- Reliable operation across multiple repetitions with consistent results

Green Deal impact

- Part damage or scrap rate during automated pick–transport–place operations (%)
- Energy consumption per successfully completed handling cycle (Wh/cycle or kWh/100 cycles)

Challenge 3.3 Battery production digitalwork instructions & skill capturing

Challenge and context: Battery manufacturing processes combine automated inspection systems with human decision-making in critical steps such as electrode coating and quality control. In such contexts, inspection systems (e.g. camera-based solutions) can be used to detect defects during production, but detecting a defect is only the first step: Operators must determine which actions should be taken to correct the issue or prevent its recurrence, such as checking machine parameters or investigating upstream causes. In current production practice, the corresponding corrective actions remain dependent on operator expertise. These decisions rely heavily on operator expertise, which is often tacit, experience-based, and not systematically captured. At the same time, industrial initiatives such as electronic workstations (eWS) aim to centralize documentation and ensure compliance, but do not capture how experienced operators respond to specific production situations, such as defect occurrences. As a result, knowledge related to defect handling and process adjustments remains largely tacit, leading to variability in decision-making across operators and shifts. This impacts product quality, process stability, and scalability, particularly in fast-growing environments such as gigafactories. The challenge is therefore to capture, structure, and formalize operator knowledge related to defect handling and decision-making, and to integrate it into adaptive DWI that complement existing eWS systems by providing context-aware, actionable guidance to operators during production.

Use case and expected solution: The use case focuses on defect detection and operator intervention recommendation in battery production, particularly in electrode coating process where identified anomalies require human decision-making. When a defect is detected, operators must decide which machine parameters to verify, which corrective actions to perform, or whether upstream processes are the root cause.

The expected solution aims to capture (vision-based or sensor-based approaches) and formalize expert knowledge associated with defect handling and translate it into adaptive digital work instructions integrated with workstation-level systems. This includes:

- Linking detected defects to recommended corrective actions or parameter checks.
- Providing context-aware guidance based on process conditions and operational context.
- Supporting operators with relevant documentation, alerts, and task-specific instructions.
- Ensuring traceability between defect detection, decisions taken, and outcomes.

The proposed approach combines knowledge representation methods with AI-based techniques capable of modelling relationships between defect patterns, process conditions, and operator decisions/solutions for resolving the production problems. The solution should extend existing documentation systems (e.g., eWS) by enabling dynamic, situation-aware guidance rather than static instructions. The resulting system will demonstrate improved process consistency, reduced variability in defect handling, and enhanced operational efficiency, contributing to more robust and scalable battery manufacturing processes.

Specification for use case: The use case focuses on supporting operator decision-making in response to defects detected by inspection systems, while integrating with existing workstation-level documentation systems. The system shall support the following functional specifications:

Defect-driven guidance:

- Identification of defect types from inspection systems and mapping to recommended corrective actions or parameter checks
- Instruction handling and integration:
- Transformation of expert knowledge into structured Digital Work Instructions
- Integration with existing documentation systems (e.g., work instructions, checklists, safety procedures)
- Delivery of alerts and updates when instructions or process conditions change

Skill and context awareness:

- Consideration of operator qualifications (e.g., training, certification) when delivering guidance
- Adaptation of instruction detail based on operator experience level

Knowledge capturing and modelling:

- Extraction and formalisation of expert decision-making practices
- Linking operator actions with process conditions and outcomes

Traceability and monitoring:

- Recording of actions taken and checks performed (e.g., process controls before/during manufacturing)
- Monitoring of compliance with required procedures

Development approach:

- Initial validation in a controlled lab environment (low TRL)
- Progressive integration and demonstration in an industrial pilot environment (TRL7)

Expected solution: The resulting solution will demonstrate improved process consistency, reduced variability in defect handling, and enhanced operational efficiency, contributing to more robust and scalable battery manufacturing processes.

Key Performance Indicators: Key Performance Indicators (KPIs) should clearly demonstrate the relevance and impact of the proposed solution. They must address at least two of the following dimensions: resource optimisation, Green Deal objectives, and social impact. All KPIs must be SMART (Specific, Measurable, Achievable, Relevant and Time-bound), ensuring they remain quantifiable throughout the project

Resource optimization

- Reduction in scrap rate associated with defect handling
- Improved consistency of operator decisions across shifts and teams
- Reduction in defect recurrence due to improved corrective actions
- Reduction in response time to detected defects
- Improved compliance with procedures and execution of required process controls

Green Deal impact

Please ensure that KPIs are measurable throughout the project duration and avoid vague, indirect, purely technical/performance oriented or non-quantifiable indicators. These KPIs should highlight how your proposal advances one area (or several) within the Green Deal scope and objectives.

Examples of KPIs adequate for measuring the Green Deal alignment of a proposal for this challenge:

- Reduction in scrap rate associated with defect handling (%)
- Reduction in material waste per battery cell or electrode (kg/unit)
- Reduction in energy consumption linked to rework and repeated inspections (%)

Challenge 3.4 Automated warehouse and internal logistics management

Challenge and context: Manufacturing companies increasingly operate highly automated and complex production environments, in which internal logistics such as buffer warehouses management, pallet flows, automated forklifts operations, and the deployment of AMRs have a direct impact on production continuity, energy consumption, and overall operational efficiency. This is particularly relevant in metal-part production settings, where production rhythms can be variable, intermediate buffers are often constrained, and disturbances can rapidly propagate across the shop floor. Despite the increasing levels of automation in production equipment, the execution and coordination of internal logistics are still frequently governed by fixed rules, manually triggered actions, or dispatcher-based decision-making. As a result, logistics resources are often used sub-optimally, leading to inefficient fleet utilization, unnecessary transport movements, delayed machine supply, increased operator effort, and avoidable production interruptions. In such environments, the lack of real-time coordination between production needs and logistics execution becomes a major barrier to both efficiency and resilience. Typical inefficiencies include:

- delayed response to machine-originated transport requests;
- poor prioritization of urgent logistics tasks;
- unnecessary empty movements and excessive transport distances;
- low fleet utilization due to unbalanced task allocation;
- weak coordination between conventional forklifts and AMRs;
- reduced resilience under disturbances such as machine stoppages, variable cycle times, and temporary congestion.

Digital Twin based control and decision-support frameworks address these limitations by enabling a more integrated, event-driven, and adaptive approach to internal logistics management. By combining real-time machine signals, logistics state information, and operational context, such frameworks can support dynamic task generation, prioritization, fleet allocation, and routing decisions. This is especially relevant in industrial contexts characterized by heterogeneous equipment, variable demand patterns, and frequent disturbances. However, effective deployment remains challenging due to the complexity of the underlying decision architectures, the need to integrate smoothly with existing machines, forklifts, AMRs, and IT systems, and the requirement to ensure practical usability in real production environments. AID4SME is flexible to overcome these challenges for use case owners inside and outside the consortium. Inside the AID4SME consortium, LTH would like to develop a smart planning tool for their automated buffer warehouse and internal logistics system. This digital twin-based tool should enable them to optimise internal workflows for the automated transporting around 200 pallets on the shop floor.

Use case and expected solution: The expected outcome is a smart, dynamic, AI-optimized fleet management engine that uses machine-triggered inputs (KLICI s stroja) as operational events, dynamically assigns transport tasks, optimizes resource use within the agreed scope, and provides an operator-facing communication layer for forklift operators and AMRs. The solution requirements are as follows:

Data availability and event inputs

For challenge preparation and low-TRL research activities, partners will work with pre-provided historical data samples and clearly documented data schemas by LTH. These are expected to include data such as, where available:

- machine-triggered inputs;

- machine and line status signals;
- warehouse and buffer status;
- pallet and material flow data;
- forklift task logs and localisation data;
- AMR mission and execution data;
- operator interaction logs; and
- production planning and order context.

Live data ingestion, system integration, and validation against the industrial environment are led by the selected SME together with LTH in the higher-TRL playground. LTH will clarify which data are directly available, which are only available as historical samples, and which indicators would need to be derived by the SME. Data and developed solutions should be made available for non-commercial (research) purposes to consortium members beyond the project duration, and a dual-licensing approach allows consortium members, especially LTH, to use the solution after project completion.

Route and fleet management

The core decision-support logic should assign tasks to available resources on the basis of constraints such as fleet availability; capability constraints; expected travel time and execution time; route constraints. The primary objective is to develop and validate an internal route and fleet management solution that interprets machine-triggered logistics inputs and supports prioritization and task allocation across conventional forklifts and one AMR demonstrator (AMR to be provided by solution provider). The selected SME may combine optimisation methods, scheduling algorithms with AI-based approaches.

Operator and system communication

The solution should include an operator-facing dispatch and feedback interface through which tasks are communicated to operators. This may take the form of an operator terminal, mobile interface, dashboard, or another practical dispatching mechanism proposed by the SME together with LTH in the higher-TRL playground. The interface should support actions such as:

- task notification;
- task acknowledgement or acceptance;
- completion feedback;
- exception handling; and
- reassignment of urgent machine-linked requests.

Specification for use case: The goal of this challenge is to move beyond static or reactive dispatching practices towards a data-driven solution of internal transport resources capable of improving responsiveness, reducing inefficiencies, and supporting more robust and sustainable production operations. The solution will be validated at TRL 6 in the LTH industrial environment through a pilot demonstration on the selected production line. The solution includes one AMR demonstrator provided by solution provider. Validation will assess technical feasibility, operational robustness, and measurable logistics improvement under realistic factory conditions. For external SME use cases, transferable results and deployment concepts will be evaluated up to TRL 7.

Expected solution: The primary objective is to develop and validate a solution enabling LTH to optimize efficiency, reduce logistics energy consumption, and production stops.

Key Performance Indicators: Key Performance Indicators (KPIs) should clearly demonstrate the relevance and impact of the proposed solution. They must address at least two of the following dimensions: resource optimisation, Green Deal objectives, and social impact. All KPIs must be SMART (Specific, Measurable, Achievable, Relevant and Time-bound), ensuring they remain quantifiable throughout the project

Resource optimisation

- Improvement in fleet utilization, measured as the proportion of productive transport time relative to total fleet availability for forklifts and AMRs.
- Reduction in empty travel distance, measured as non-productive distance per vehicle per shift.
- Decrease in production stops caused by logistics delays, measured as the number and duration of machine stoppages caused by missing material, delayed pickup, or unavailable transport.
- Reduction in response time to machine calls, measured from event generation to task assignment and task completion.
- Improvement in warehouse and buffer space utilisation efficiency, measured through occupancy patterns, dwell time, and turnover efficiency.
- Task completion reliability, measured as the percentage of logistics tasks completed within the required service window.

Green Deal impact

Examples of KPIs adequate for measuring the Green Deal alignment of a proposal for this challenge:

- Reduction in internal logistics energy consumption, measured per shift and normalised per manufactured product unit.
- Reduction in empty travel distance, measured as non-productive distance per vehicle per shift.

Social impact

- Reduction in manual operator interventions, measured as the decrease in manually dispatched or manually corrected transport tasks per shift.
- Reduction in operator time spent on logistics coordination, measured in minutes per shift or per production batch.

Domain 4: Combined AI and Data solutions for AUTOMATION

Challenge 4.1 Smart energy management of unplanned machine downtime

Challenge and context: In high-volume and energy-intensive industrial parts production, a significant share of energy losses occurs during unplanned machine downtime, such as micro-stoppages, quality control stops, disruptions caused by tool malfunctions, or other unexpected interruptions. Unlike planned non-production periods, these events are often unmanaged from an energy perspective, leading to machines and auxiliary systems remaining in fully powered states while no value-adding operations take place. This challenge focuses on industrial production cells for parts manufacturing, where machines operate in cyclical modes and rely heavily on auxiliary and spatially distributed energy consumers, such as tool tempering units and compressed air systems. These subsystems remain in standby and continue to consume energy even when production cycles have stopped unexpectedly, resulting in unnecessary energy use, increased operational costs, and higher environmental impact. LTH currently operates several production cells where machine cycle information is available at PLC or sensor level; however, automated energy-aware control of auxiliary energy consumers during unplanned downtime is not yet implemented. Operators intervene manually or not at all, and auxiliary systems often remain in full operation during downtime. The challenge addresses the need to automatically detect machine cycles, identify unplanned downtime events in real time, determine appropriate energy mitigation strategies and dynamically transition machines and auxiliary equipment into appropriate standby or off modes. On the other hand, the estimated preparation time to continue production should be predicted and orchestrated control of auxiliary systems should be performed at process startup, without compromising production readiness or product quality once production resumes.

Use case and expected solution: The expected solution should provide an automated energy management system that continuously monitors machine cycle signals, production states, and energy consumption within an industrial production cell and provides an orchestrated control of most significant consumers linked to the observed operation. The solution shall include a smart tool tempering unit for aluminium diecasting process capable of individual monitoring and control of each tempering circuit within the diecasting tool and integration capability for real-time measurement, visualization and regulation with aim to integrate it within the demonstrated system. Based on this information, the system shall:

- Automatically detect machine cycle starts, normal cycle operation, cycle interruptions, and unplanned downtime events using real-time data.
- Distinguish between short micro stoppages and longer unplanned downtime to select appropriate energy saving strategies.
- Dynamically control machine operation states (e.g. run, standby, off mode) during unplanned downtime.
- Specifically optimize the operation of energy intensive auxiliary systems, with a focus on Tool tempering unit (TTU) and Air Management System (AMS).

Specification for use case: The solution will use data driven methods, combining rule-based logic with AI or machine learning techniques, to learn normal cycle behavior, automatically detect deviations, and continuously improve downtime classification and energy saving decisions. Moreover, it should provide a reliable indicator of the estimated time needed for re-activation of the auxiliary systems. The developed solution should be demonstrated in the industrial environment, where communication with the auxiliary systems should be resolved using standard communication protocols (OPC-UA, MODBUS, etc.). Finally,

the control of auxiliary services (TTUs and AMS) shall operate autonomously, without reliance on manual operator input, while remaining fully compatible with production control systems, safety constraints, and quality requirements.

Expected solution: The expected solution should be demonstrated and validated under real production conditions with varying unplanned downtime scenarios. The solution should provide the following functionalities:

- Machine cycle detection from PLC signals, sensors, or energy signatures.
- Realtime identification of unplanned downtime events.
- Integration of monitoring and automated control of compressed air pressure and airflow, including supply of IoT-enabled AMS.
- Integration of automated control of TTU and supply of suitable TTU for the pilot.
- Energy aware control interfaces for production cells supporting standby and off modes.
- Orchestrated and on-time management of startup phases.

Key Performance Indicators: Key Performance Indicators (KPIs) should be defined as clear, objective criteria that demonstrate the relevance and impact of the proposed solution, covering at least two of the following dimensions—resource optimisation, Green Deal objectives, and social impact—and must be SMART (Specific, Measurable, Achievable, Relevant and Time-bound), ensuring they remain quantifiable throughout the project

The demonstrated solution will enable LTH to significantly reduce nonproductive energy consumption in parts production cells while maintaining production flexibility and responsiveness. The impact of the developed solution will evaluate changes compared to the baseline conditions (operation without the energy management system).

Resource optimisation

- Percentual increase in production recovery time, measuring the delay between cycle restart and stable production.

Green Deal impact

- Percentual reduction of energy consumption during unplanned downtime for managed machines and linked auxiliary systems.
- Percentual reduction in compressed air flow during unplanned downtime.

Challenge 4.3 Semi-automated EV battery disassembly for recycling

Challenge and context:Complex assemblies, such as EV batteries and motors, across manufacturers and vehicle models vary significantly. E.g., virtually each battery type has its own type of cables, bus bars, battery modules, and different types of cells. This variability makes the automation of EV drivetrain components dismantling for recycling challenging. Additionally, current EV batteries subjected to recycling are mainly Li-ion based, posing a multitude of hazards for recycling processes. Automating each process for each battery type is time-consuming and costly, if at all possible. Given the end-of-life state of such assemblies, there is often little to no reliable information on their internal composition, condition, or hazards. Therefore, battery recycling companies are (sub)consciously building a mental, written, or digital catalog of product-specific datapoints, based on the operator's experience. Capturing both operator actions and hazardous components (whether mechanical, electrical, chemical, or thermal) and subsequently registering them uniformly for each product type/variant would allow, on one hand, a more efficient manual disassembly for recurring models by integrating digital work instructions, and on the other hand, the opportunity to, where possible, automate specific hazardous, unergonomic, or repetitive tasks.

Use case and expected solution: A consortium partner has a laboratory for EV motor and battery dismantling available, with an industrial robot at TRL 4, specifically focusing on developing flexible human-machine collaborative demanufacturing processes. This partner has several technology blocks at TRL 4, leveraging computer vision and AI technologies from other areas, enabling the development of dismantling operations for different products without requiring specific robot programming for each. Another partner has significant knowledge and experience regarding, specifically, battery-related hazards and the required safety precautions. A missing key element is an operator interface that enables structured recording of manual operations, hazards, and status feedback, based on which the system can later present product-specific work instructions to the operator. All relevant product and process data should be logged in the Digital Product Passport (DPP), which can then be utilized to base future robotic/manual work instructions on. The consortium partners will support the selected SME by providing the following contributions:

- A suitable lab environment for the final demonstration, including a workbench setup with product clamping, a top frame for a projector and cameras, tool mounting, and demo case study products, including a dummy EV battery assembly and EV motors.
- A draft DPP data structure. The partner will demonstrate the use of the registered data in the DPP by the robotic disassembly system.
- In-depth knowledge and guidance in battery-related safety hazards.

Specification for use case: The consortium partners will guide and mentor SMEs to develop the operator's interface for a robot cell for semi-automatic dismantling of various EV component types, extending to overall mechatronic system demanufacturing approaches. In this solution, a human operator manually records operations on newly encountered products, of which some will later be performed by industrial robots and some, which a robot cannot perform, will still be performed by the operator, although supported by digital work instructions.

Expected solution

- Detection and logging of manual operations and hazards
- Detect and evaluate the manually performed operations, using common/smart hand tools (e.g., screwdrivers, pliers, cutters) and hand tracking (e.g., component pickup and component drop off), also incorporating hazard logging.

- Storage of manual operations and product data in a Digital Product Passport (DPP)

All relevant parameters (such as fastener locations and types, and relevant hazards) should be saved in a standardized digital format so that they can later be used to perform human-robot cooperative disassembly tasks on the same model type. All disassembly operations should be registered in such a way that a reusable (chrono)logical disassembly sequence is compiled.

Digital work instruction visualization

Intuitively display digital work instructions by projecting them on the workbench (2m width and 1,2 m depth) and on the product itself to reduce mental overload and to align instructions directly with the product and setup. To allow for the projection of markers and instructions on the complex geometries of the case study products, 3D mapping and multi-angle projection are required.

Hazard warning and monitoring visualization

Clearly display relevant operator safety instructions during manual disassembly. For example, highlight electrical contacts of battery modules that may still hold a charge, sharp objects, unknown chemical substances, warm surfaces, and other potential hazards. Use clear and unambiguous pictograms to reduce language dependence and support a safer working environment. In addition, proposals that include complementary monitoring systems are encouraged. This may include the integration of thermal vision systems, not only to detect potential thermal runaway events and trigger both local (work cell) and plant-wide safety alarms, but also to support monitoring, testing, and validation activities during disassembly operations.

Key Performance Indicators: Key Performance Indicators (KPIs) should clearly demonstrate the relevance and impact of the proposed solution. They must address at least two of the following dimensions: resource optimisation, Green Deal objectives, and social impact. All KPIs must be SMART (Specific, Measurable, Achievable, Relevant and Time-bound), ensuring they remain quantifiable throughout the project

Resource optimisation

- Position accuracy of the recorded locations: The position accuracy of the recorded locations and operations should be at least $\pm 10\text{mm}$ and $\pm 10^\circ$.
- Reduction in teaching time for new product types: Increase the speed at which a new product type can be taught for robotic disassembly by a minimum of 50%, comparing manual data logging versus the implemented technologies.
- Reduction in time for supporting and intermediate actions: Achieve a minimal time reduction of 50% for supporting and intermediate disassembly actions, such as tool switching, picking and placing components in designated bins, cutting cables, or repositioning the product. These improvements should be measured separately from primary disassembly actions (e.g., unscrewing or prying), which are not expected to be significantly impacted by digital work instructions.
- Completeness of hazard logging and visualization: Log and clearly display all relevant hazard warnings on component/location level.

Green Deal impact

- Improved recovery of components and materials: Increase the share of disassembly steps for which components, fasteners, hazards, and removal sequences are correctly logged in the DPP, supporting more consistent separation and recovery of valuable or hazardous (battery) materials.
- Reduction in mixed or incorrectly handled fractions: Reduce the number of components or subassemblies sent to mixed, unknown, or manual rework streams due to missing product-specific disassembly information.
- Reduction in repeated teaching and rework effort for recurring product types: Reduce the need to repeatedly define disassembly instructions for the same product type by reusing previously recorded DPP data and digital work instructions.
- Improved safe separation of hazardous battery components: Increase the share of relevant electrical, thermal, chemical, and mechanical hazards that are logged and visualised at component or location level before removal.

Social impact

- Improvement of operator workload and usability: Demonstrate a measurable reduction in mental and physical workload associated with manual disassembly by implementing projected digital work instructions. This should be evaluated by comparing a limited guided approach (e.g. with printed paper instructions) with the proposed system, in a manner similar to [1], using a structured assessment method such as the NASA Task Load Index [2]. Evaluation should consider mental demand, physical demand, temporal demand, effort, frustration and perceived performance, while maintaining at least the same task success rate.

[1] W. Mahy, D. Gors, B. Van Doninck, H. Qin and J. R. Peeters, "Projection-Based Augmented Reality to Support Human Intervention in Robotic Disassembly: A Case Study for Bike Batteries," 2026.

[2] S. G. Hart and L. E. Staveland, "Development of NASA-TLX (Task Load Index): Results of empirical and theoretical research," 1988.

Challenge 4.4 Co-bot refrigerator door assembly solutions

Challenge and context: The development of new automation technologies for the manufacturing industry directly contributes to efficiency, safety, and human factors. Modular, reconfigurable, energy-efficient, and collaborative robots can enable industries to optimize their operations, reduce waste, lower their environmental impact, and improve human operator job attractiveness. The white goods factory of a partner is one area where collaborative robots can make a significant difference. This partner will provide a use case for their refrigerator production line, where refrigerator gaskets of different shapes and sizes are installed on refrigerator doors. Manual installation of the refrigerator gaskets poses ergonomic challenges, resulting in inefficiencies and potential product rejections. Partial (co-bot) automation of gasket installation, particularly flexible elastomer gaskets, presents unique challenges that require the integration of collaborative robotics and AI to optimize the installation process. This ensures precision, safety, and adaptability to the deformable nature of elastomers, as the co-bot must apply the right force on the flexible material without causing deformation. The partner seeks a co-bot solution to overcome these challenges while aligning with the Green Deal's focus on promoting worker well-being and safety.

Use case and expected solution: The solution enables to improve efficiency, operator ergonomics, and inclusiveness, and reduce waste. This will result in more efficient production processes, better utilization of machinery, and enhanced overall operational efficiency. The expected solution can utilize a catalogue of developed technologies validated in the lab (TRL 4), building on results from previously funded EU projects related to collaborative assembly, and can apply them in a working solution for the gasket installation use-case at TRL7. This will enable to improve efficiency, operator ergonomics, and inclusiveness, and reduce waste. This will result in more efficient production processes, better utilization of machinery, and enhanced overall operational efficiency. It will be demonstrated at TRL 9 at the high-TRL partner facility and will offer the means to be advanced to even higher TRL, including with all safety requirements for factory deployment. The AID4SME solutions will foster a sustainable and inclusive digital transition that benefits both manufacturing companies and society at large.

Specification for use case: The solution will enable improved efficiency, operator ergonomics, and inclusiveness, decrease waste, and increase the longevity of refrigerator doors through enhanced stability of gasket installation quality.

Instruction handling and integration:

- Transformation of expert knowledge into structured Digital Work Instructions
- Integration with existing documentation systems (e.g., work instructions, checklists, safety procedures)
- Delivery of alerts and updates when instructions or process conditions change

Skill and context awareness:

- Consideration of operator qualifications (e.g., training, certification) when delivering guidance
- Adaptation of instruction detail based on operator experience level

Knowledge capturing and modelling:

- Extraction and formalisation of expert decision-making practices
- Linking operator actions with process conditions and outcomes

Traceability and monitoring:

- Recording of actions taken and checks performed (e.g., process controls before/during manufacturing)
- Monitoring of compliance with required procedures

Development approach:

- Initial validation in a controlled lab environment (low TRL)
- Progressive integration and demonstration in an industrial pilot environment (TRL7)

Expected solution: The selected third party is expected to contribute with the following:

- Develop a co-bot-assisted gasket installation solution
- Integrate AI-based perception and control systems to allow the co-bot to adapt to different gasket shapes and models.
- Ensure compliance with safety and ergonomic standards, by reducing physical strain on human workers and improving workplace safety with co-bot working
- Demonstrate human-robot collaboration capabilities, where the co-bot supports rather than replaces the human operator, ensuring intuitive interaction and task sharing.

Key Performance Indicators: Key Performance Indicators (KPIs) should clearly demonstrate the relevance and impact of the proposed solution. They must address at least two of the following dimensions: resource optimisation, Green Deal objectives, and social impact. All KPIs must be SMART (Specific, Measurable, Achievable, Relevant and Time-bound), ensuring they remain quantifiable throughout the project

Resource optimisation

- Demonstrate effective and flexible autonomous processes (% 10 increase in assembly precision).
- Increase quality: robotized processes can more easily detect errors in production during the process itself (%10 reduction in installation errors).
- 5 % reduction in waste due to assembly defects

Green Deal impact

- 5 % reduction in waste due to assembly defects

Social impact

- Ensure the safety of workers in the vicinity.
- Improved efficiency: reduce the number of workers required at the production line (%50 reducing labour for gasket assy).
- Operator ergonomics: reduce operator/worker effort, as they will be able to focus on other tasks.
- Percentage of operators trained in safe procedures

Annex 2. Proposal Template



AID4SME | Open Call #2

Annex 2. Proposal template

Version 1.0 – 2026.05.13

Disclaimer

Funded by the European Union. Views and opinions expressed are however those of the author(s) only and do not necessarily reflect those of the European Union or European Commission. Neither the European Union nor the granting authority can be held responsible for them.

INSTRUCTIONS

Read carefully before preparing your proposal:

Please delete this page when submitting the proposal. Delete the guidance/ information text in **yellow** in each section and any footnotes.

Please use this template to prepare your proposal. It has been organised to ensure that the important aspects of your planned work are measurable with respect to the evaluation criteria. Sections 1 to 4 of this template each correspond to an evaluation criterion (see Annex 1 – Guide for Applicants document for details).

The structure of this template **must** be followed when preparing your proposal. Applicants using another template/ document structure will be automatically disqualified. Only those proposals that successfully address all the required aspects included in the template will have the opportunity to be funded.

On the cover page, please include the following:

- Title and acronym of your proposal
- Full legal name of the applicant and country (as indicated in the application form)
- Title and code of the challenge the proposal addresses (check Annex 1).

The page limit for the proposal (Sections 1-4) is **15 pages** (i.e., this limit excludes the **cover page, and Ethics and Security section**). Consider the limits indicated below the title of each section (**in yellow**) as guidance to keep within the 15-page limit. Tables are allowed and must be included within this page limit. The minimum font size allowed is 11 points (note: tables can use font size 10 points). The page size is A4, and all margins (top, bottom, left, right) should not be changed from their current setting. Paragraph spacing should be a minimum 0pt before/ after, and 1pt line spacing. **Arial** must be used as the font style (or Times New Roms, if Arial is incompatible with your system) and **black** as the font colour to facilitate readability.

The Ethics/Security section is not covered by a page limit.

The proposal must be uploaded in .PDF format. If you attempt to upload a proposal longer than the specified limit, excess pages will be made invisible, and will not be taken into consideration by the experts.

Please delete this page and previous pages when submitting the proposal. Delete the guidance/ information text in **yellow** in each section and any footnotes.

COVER PAGE

Proposal Information	
Project Title	
Project Acronym	
Challenge	

Consortium	Entity Name*	Entity Name Short	Type of organisation	Country
LEAD				
BEN (when applicable)				

*As indicated in the Application Form

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[Page count start here]

1 Novelty & Innovation

Maximum 5 pages.

1.1 Methodology

Describe the overall methodology, concept and objectives (general and specific) of the project within the scope of the open call and the project. Include also:

- Brief description of the State-of-art.
- Expected project outcomes, which should be justified, measurable and realistic within the timeline of the project implementation.
- The innovation potential, and how the project is novel.

[Add text here]

1.2 Technical description of the proposed solution

Describe the capabilities and the requirements of the proposed solution:

- Capabilities
 - What can the solution do?
 - What problem does it solve?
 - What formal language/planning features does it support?
 - Any limitation (e.g. is the solution domain specific? Or does it make any particular assumption on the input problem)?
- Technology Readiness Level
 - What is the current TRL of the proposed solution?
 - Has the solution been used in some projects/applications already? If so, which ones?
- Technical requirements (e.g. operating system, external libraries or tools, programming language).
- Are there any publications related to the solution?

[Add text here]

1.3 Alignment with the selected AID4SME challenge

Describe the alignment of the proposed solution with the selected AID4SME challenge

[Add text here]

2 Impact

Maximum 3 pages

2.1 Contribution to the AID4SME ecosystem and to strengthening the competitiveness and growth of the sector/industry

Describe the overall impact of the project, focusing on:

- Contribution of the project to the AID4SME ecosystem and objectives.
- Contribution of the project on the applicant.
- Contribution to strengthening the competitiveness and growth of the industry by developing research/ innovations that meet the needs of European and global markets.

[Add text here]

2.2 Exploitation plan and Intellectual Property Rights

Describe the planned activities/ measures to promote the project, and to exploit and disseminate the project results (including management of IPR). List main Key Exploitable Results.

Describe/report the license and the availability of the proposed solution.

- Does the solution have a license already? In case, which one?
- Who is the owner?
- Under which terms will the AID4SME consortium be able to use/integrate the solution?

[Add text here]

2.3 Impact of the proposed solution on green alignment, social and environmental sustainability

Describe the impacts of the proposed solution on green alignment, social and environmental sustainability.

List key performance indicators how the proposed solution is addressing to the Green Deal (https://commission.europa.eu/strategy-and-policy/priorities-2019-2024/european-green-deal_en)

Note that all tables are mandatory and cannot be deleted.

[Add text here]

Table 2a. List 3 to 4 KPIs relevant to your proposal's alignment with the Green Deal

KPI	Name	Description	Unit

3 Implementation

Maximum 5 pages.

Note that all tables are mandatory and cannot be deleted.

3.1 Work Plan

Describe the proposed workplan to be implemented towards the achievement of the objectives/results. Include also:

- The specific activities that will be implemented, the time required, and expected outputs.
- Include a gantt chart.
- Relevant deliverables and milestones to measure achievement of results.
- Critical risks (i.e, likelihood and impact) that may affect the workplan and compromise the project.

[Add text here]

Table 3a. Project work plan

Work plan
Stage 1 - 1 month - Plan Task 1.1 Discuss and agree on the project's Action Plan (M1) Describe the task activities and objective of the task Indicate the contribution to the task of each beneficiary [Add text here]
Stage 2 - 7 months - Development Task 2.x - [Insert name of task] (Mx-Mx) Describe the task activities and objective of the task Indicate the contribution to the task of each beneficiary [Add text here]
Stage 3 - 2 months - Test & validation Task 3.x - [Insert name of task] (Mx-Mx) Describe the task activities and objective of the task Indicate the contribution to the task of each beneficiary [Add text here]
Stage 4 - 4 months - Solution Assessment & Business Plan Task 4.x - [Insert name of task] (Mx-Mx) Describe the task activities and objective of the task Indicate the contribution to the task of each beneficiary [Add text here]

--

NOTE: Add as many tasks in Stages 2 to 4 as required.

Table 3b. List of deliverables

Deliverable No.	Deliverable Title	Description	Stage No	Type (a)	Due Date (month)
D1					
D2					
Dx					

(a) R - Document, report; DEM — Demonstrator, pilot, prototype; DMP - Data Management Plan; O - Other

NOTE: Add lines (for activities) as required

Table 3c. List of milestones

Milestone No.	Milestone title	Description	Stage No	Means of verification	Due Date (month)
MS1					
MS2					
MSx					

NOTE: Add lines (for activities) as required

Table 3d. List of critical risks

Risk No.	Risk Description (a)	Stage No	Mitigation measures
R1	Activity 1		
R2	Activity 2		
Rx	Activity 3		

(a) Indicate level of Likelihood and Impact: Low, Medium or High

NOTE: Add lines (for activities) as required

3.2 Budget

Provide a description and justification of the expected costs and the requested total contribution using the table.

Indicate the number of person-months (full-time equivalent) of the people involved in the project in the table below for the duration of the project.

[Add text here]

Table 3e. Person-months allocated to the project

Entity Short Name	Stage 1 - Total PMs	Stage 2 - Total PMs	Stage 3 - Total PMs	Stage 4 - Total PMs	Total (PMs ¹)
					Insert total PMs
(if applicable)					Insert total PMs
Total	Insert total PMs	Insert total PMs	Insert total PMs	Insert total PMs	Insert total PMs

¹ Note that a PM is a metric for expressing the effort of a person dedicated full time in one month.

[Add text here]

Table 3f. Costs of the project

Entity Short Name 1		
Cost category	Amount (EUR)	Justification
[A] Direct personnel costs		
[B] Travel costs		
[C] Equipment costs*		
[D] Other direct costs		
[E] Indirect costs		$[E] = ([A] + [B] + [C] + [D]) * 0.25$
[F] TOTAL	Insert total amount here	$[F] = [A] + [B] + [C] + [D] + [E]$

* Depreciation costs only

Entity Short Name 2 (if applicable)		
Cost category	Amount (EUR)	Justification
[A] Direct personnel costs		
[B] Travel costs		
[C] Equipment costs		
[D] Other direct costs		
[E] Indirect costs		$[E] = ([A] + [B] + [C] + [D]) * 0.25$
[F] TOTAL	Insert total amount here	$[F] = [A] + [B] + [C] + [D] + [E]$

* Depreciation costs only

[Add text here]

Table 3g. Total Project Costs and Total contribution Requested

Entity Short Name	[A] Total Project Costs (EUR)	[B] Funding Rate (%) ^(a)	[C] Total contribution requested (EUR) ^(b) ([C] = [A] * [B])
		70	
(if applicable)		70	
TOTAL	Insert total amount here	NA	Insert total amount here

(a) Funding rate is 70% as per Section 4.3 of the Guide for Applicants; (b) Total maximum contribution requested per project cannot exceed EUR 200 000.00 as per Section 4.3 of the Guidelines for Applicants

4 Team

Maximum 2 pages.

4.1 Describe the competencies of the core team

Describe the team that will be involved in the implementation of the project. Note: the involvement of additional people in the project implementation but not identified in the proposal is welcome, but the core team provided below must be maintained.

Include also:

- A short summary of the relevant experience of each person included in the table.
- Justification of how the team has the required knowledge and capacity to guarantee a successful project implementation.
- Justification of the consortium's gender balance.

[Add text here]

Table 4a. Summary of applicant's team

Entity name	short	Name of person	Gender	Role in the project	Key areas of expertise
		Person 1			
		Person 2			
		Person n			

NOTE: Add lines (for persons) as required

4.2 Capacity of entities and consortium (if applicable) as a whole

Describe the consortium infrastructures and facilities used as part of the project. You must include:

- Assessment of your technological and operational capacity to deliver.
- A demonstrated commitment to achieving the project's objectives.

[Add text here]

[Page counts end here]

5 Ethics and Security

NOTE: PLEASE FILL OUT THE ETHICS/ SECURITY ANNEX ON THE FOLLOWING PAGE

There is no page limit.

ETHICAL SELF-ASSESSMENT TABLE

Informed consent	YES / NO
Informed consent	
Does the proposal involve children?	
Does the proposal involve patients or persons not able to give consent?	
Does the proposal involve adult healthy volunteers?	
Does the proposal involve Human Genetic Material?	
Does the proposal involve Human biological samples?	
Does the proposal involve Human data collection?	
Research on human embryo/foetus	YES / NO
Does the proposal involve Human Embryos?	
Does the proposal involve Human Foetal Tissue / Cells?	
Does the proposal involve Human Embryonic Stem Cells?	
Privacy	YES / NO
Does the proposal involve processing of genetic information or personal data (e.g., health, sexual lifestyle, ethnicity, political opinion, religious or philosophical conviction)	
Does the proposal involve tracking the location or observation of people?	
Research on animals	YES / NO
Does the proposal involve research on animals?	
Are those animals transgenic small laboratory animals?	
Are those animals transgenic farm animals?	
Are those animals cloned farm animals?	
Are those animals nonhuman primates?	
Research involving developing countries	YES / NO
Use of local resources (genetic, animal, plant etc)	
Benefit to local community (capacity building i.e., access to healthcare, education etc)	
Dual use	YES / NO
Research having direct military application	
Research having the potential for terrorist abuse	
ICT implants	YES / NO
Does the proposal involve clinical trials of ICT implants?	

5.1 Ethics

If you have entered any ethics issues in the ethical issue table, you must:

- *submit an ethics self-assessment, which:*
 - *describes how the proposal meets the national legal and ethical requirements of the country or countries where the tasks raising ethical issues are to be carried out;*
 - *explains in detail how you intend to address the issues in the ethical issues table, in particular as regards:*
 - *research objectives (e.g. study of vulnerable populations, dual use, etc.)*
 - *research methodology (e.g. clinical trials, involvement of children and related consent procedures, protection of any data collected, etc.)*
 - *the potential impact of the research (e.g. dual use issues, environmental damage, stigmatization of particular social groups, political or financial retaliation, benefit-sharing, malevolent use, etc.)*
- *provide the documents that you need under national law (if you already have them), e.g.:*
 - *an ethics committee opinion;*
 - *the document notifying activities raising ethical issues or authorizing such activities*

⚠ If these documents are not in English, you must also submit an English summary of them (containing, if available, the conclusions of the committee or authority concerned).

⚠ If you plan to request these documents specifically for the project you are proposing, your request must contain an explicit reference to the project title.

[Add text here]

5.2 Security

Please indicate if your project will involve:

- Activities or results raising security issues: [YES/NO]
- 'EU-classified information' as background or results: [YES/NO]
- Any potential "dual use" of results: [YES/NO]

Annex 3. Sub-grant Agreement Template



AID4SME | Open Call #2

Annex 3. Sub-grant Agreement Template

Version 1.0 – 2026.05.13

Disclaimer

Funded by the European Union. Views and opinions expressed are however those of the author(s) only and do not necessarily reflect those of the European Union or European Commission. Neither the European Union nor the granting authority can be held responsible for them.

Contracting parties

This **Agreement** ('the Agreement') is between the following parties:

On the one part,

F6S EU Tech Innovation Network DAC, established in Work Hub, 77 Camden Street Lower Dublin, Dublin 2 D02 XE80, Ireland, VAT number IE4237109IH, represented for the purposes of signing the Agreement by Nuno Varandas, Director,

Hereinafter referred to as the "Open Calls Coordinator",

and, on the other part,

OPTION 1 - consortium

_____ [Organisation name/ individual name]
established in _____, [Full official address], VAT
number _____, represented for the purposes of signing the Agreement by
_____ [Name of legal representative], acting as Lead
Beneficiary of the _____ [%Sub-grant ProjectAcronym%] project, and signing the
Agreement on behalf of the _____ [%Sub-grant ProjectAcronym%] consortium, as
agreed in the Consortium Declaration of Honour;

Hereinafter collectively referred to as the "Beneficiaries,

OPTION 2 - individual/SME

_____ [Organisation name/ individual name]
established in _____, [Full official address], VAT
number _____, represented for the purposes of signing the Agreement by
_____ [Name of legal representative],

Hereinafter referred to as the "Beneficiary";

Hereinafter, all parties above are collectively referred to as the "Contracting Parties"

The Contracting Parties **HAVE AGREED** to the following terms and conditions including those in the following Annexes, which form an integral part of this sub-grant agreement.

General provision

The grant is awarded to %Sub-grant ProjectAcronym%, selected in the framework of the AID4SME %OpenCallName%.

The agreement sets out the terms and conditions for paying the grant to the Beneficiary/Beneficiaries and rights and responsibilities of the Beneficiary/Beneficiaries implementing the awarded project.

Article 1 - Entry into force and termination of the agreement

1.1. Entry into force

1. This Agreement enters into force on the day of its signature by the last Contracting Party.

1.2. Agreement termination

1. This Agreement will automatically terminate at the date mentioned in Article 1.3.
2. Either Contracting Party can terminate the Agreement by written notice.
3. Termination has no effect on the provisions that normally continue to apply after the end of the Programme and duration of the Agreement.
4. The Open Calls Coordinator will be entitled to terminate the Agreement by written notice with immediate effect if the Beneficiary/Beneficiaries do/does not fulfil their obligations. In this case, the provisions of Article 3 shall prevail.
5. In case of termination by the Beneficiary/Beneficiaries, no additional payments will be made beyond the last concluded 'Sprint', regardless of subsequent work carried out.

1.3. Duration and starting date of awarded the project

1. The effective starting date of the awarded %Sub-grant ProjectAcronym% is 01 November 2026.
2. The end date of the awarded %Sub-grant ProjectAcronym% is 31 December 2027.
3. The %Sub-grant ProjectAcronym%, will be implemented for 14 months.
4. The implementation of the awarded project shall start on the date given above, even if the agreement has been signed at a later date.
5. The Beneficiary/Beneficiaries will have access to limited information until the Agreement is signed.

Article 2 - Conflict of Interest

1. The Beneficiary/Beneficiaries shall take every necessary precaution to avoid any risk of conflict of interest relating with economic interests, political or national affinities, personal or any other interests liable to influence the impartial and objective performance of this project.
2. In case the Beneficiary/Beneficiaries is involved in a conflict of interest or in a risk of conflict of interest, the Beneficiary/Beneficiaries must formally notify this situation to the Open Calls Coordinator without delay and immediately take all the necessary steps to rectify this situation.

Article 3 - Breach of contractual obligations

1. If the **Beneficiary/Beneficiaries** breaches any of the contractual obligations under this Agreement, the agreement may be terminated with immediate effect. In case of Force Majeure, the provisions of Article 8 shall prevail.
2. In the event of breach of the contractual obligations by the **Beneficiary/Beneficiaries**, the Open Calls Coordinator reserves the right to withhold the payments, not to fulfil the payments to the Beneficiaries and the right to claim a refund of any already paid funds.
3. The Open Calls Coordinator will give written notice requiring that such a breach be remedied within 30 consecutive days. In case the **Beneficiary/Beneficiaries** has/have not introduced remedies addressing the notice, the Open Calls Coordinator may decide to terminate the Agreement unilaterally. In case the **Beneficiary/Beneficiaries** introduce(s) remedies that are approved by the Open Calls Coordinator, the implementation must continue following the original timeline.

Article 4 – Project implementation and financial provisions

4.1 Maximum financial contribution

1. The maximum financial contribution to be granted to the **Beneficiary/Beneficiaries** of the project is EUR xxxx (xxxx) and will be paid in the form of a lump sum.

4.2 Distribution of the financial contribution

1. The financial contribution will be paid in instalments after the **Beneficiary/Beneficiaries** have fulfilled the necessary requirements of each Sprint of the project as stated in Articles 4.3 and 4.4.
2. The Open Calls Coordinator reserves the right to withhold the payments in case the **Beneficiary/Beneficiaries** does not fulfil its obligations and considers the payment conditions for each Sprint.
3. Payments will be made in EUR. Banking and transaction costs related to the handling of any financial resources will be covered by the **Beneficiary/Beneficiaries**.
4. Payments will be released after the work associated with a particular sprint has been approved and no later than thirty (30) calendar days after the receipt of the required Payment Request Form. Any specific limitation delaying payments will be made known in advance.
5. The **Beneficiary/Beneficiaries** is/are responsible for complying with any tax and legal obligations that might be attached to this Agreement.
6. Any additional conditions for payment may be specified in the Annex 1 - Guide for Applicants.
7. A Know Your Customer (KYC) check must be carried out before any payment. If the KYC check determines that additional information is required, the payment period mentioned in 'Article 4 - Project implementation and financial provisions' is reset until all additional information is received.

4.3 Project implementation

1. The **Beneficiary/Beneficiaries** will implement the awarded project in accordance with the provisions set out in Annex 1 - Guide for Applicants.
2. The awarded project must submit the required reports corresponding to each sprint within the dates specified in Annex 1 - Guide for Applicants.
3. A review of submitted reports will be held with the **Beneficiary/Beneficiaries** by **the last calendar day of the end month** of the sprint. The objective of the review is to present the implemented sprint and provide answers to questions from the mentors/coaches and/or AID4SME consortium.
4. If at any of the project Sprints the quality of work demonstrated and/or reported does not correspond to what has been agreed, the AID4SME Open Calls Coordinator may agree to a resubmission of a report and respective reassessment. If significant improvements are not delivered after the reassessment, the sub-project is therefore considered to be in breach of their contractual obligations. Such breach will lead to measures described in Article 3.

4.4 Payments schedule

1. The payment schedule is directly linked to the relevant Sprints of the awarded project. The grant will be paid in instalments according to Table 1.

Table 1. Payment schedule for AID4SME funding programme #2

Sprint/Phase	Requirements	Amount (%)

2. The payments will be disbursed once the work related to a specific Sprint has received positive assessment, based on the report submitted and respective review according to the Article 4.3.
3. The payments will be made to the **Beneficiary/Lead Beneficiary** no later than 30 calendar days, subject to the duly completed submission of a Payment Request Form and Declaration of Honour.
4. If the bank account details provided in the Payment Request Form are different from those submitted in the Bank Account Information form, a new form must be submitted accompanied by proof of ownership of the bank account with the name of the **Beneficiary/Beneficiaries** (bank account statement or similar document).
5. If by law the **Beneficiary/Beneficiaries** is required to send an invoice, it must include the following information:

F6S EU Tech Innovation Network DAC
 77 Lower Camden St., D02 XE80, Dublin, Ireland
 VAT number: IE 4237109IH (DAC)

4.5 Records keeping

1. The **Beneficiary/Beneficiaries** must keep for a period of five (5) years after the termination of the **%Sub-grant ProjectAcronym%** project, records and other supporting documentation which proves the proper implementation of the awarded project.
2. The **Beneficiary/Beneficiaries** shall make the supporting documentation available upon request or in the context of checks, reviews, audits or investigations.
3. If there are on-going checks, reviews, audits, investigations, litigation or other pursuits of claims under the Agreement, the **Beneficiary/Beneficiaries** must keep these records and other supporting documentation until the end of these procedures.
4. The **Beneficiary/Beneficiaries** must keep the original documents. Digital and digitised documents are considered originals if they are duly recognised as such and/or admissible under the applicable national law. The **%Sub-grant ProjectAcronym%** project may accept non-original documents if they offer a comparable level of assurance.

4.6 Double funding

1. The **Beneficiary/Beneficiaries** acknowledge(s) the fundamental principle underpinning the rules for public expenditure in the EU that no costs for the same activity can be funded twice from the EU budget.
2. The **Beneficiary/Beneficiaries** undertake(s) all the work performed under the **%Sub-grant ProjectAcronym%** project will be done exclusively in the scope of this Agreement, not being supported or funded by any other EU budget. The **Beneficiary/Beneficiaries** will use the budget to cover activities only related to the awarded **%Sub-grant ProjectAcronym%** project.

Article 5 - Liability

5.1 Liability of the Beneficiary/Beneficiaries

1. The **Beneficiary/Beneficiaries** is/are fully responsible for the proper implementation of **%Sub-grant ProjectAcronym%** and in compliance with this Agreement.
2. Except in case of force majeure (Article 8), the **Beneficiary/Beneficiaries** must compensate the Open Calls Coordinator for any damage they sustain because of the implementation of the obligations of the Beneficiaries under this Agreement or because the obligations were not implemented in full compliance with this Agreement.
3. The AID4SME consortium or consortium partner cannot be held liable for any damage caused to the **Beneficiary/Beneficiaries** or to third parties as a consequence of implementation of the Agreement, including for gross negligence.
4. The AID4SME consortium or consortium partner cannot be held liable for any damage caused by the **Beneficiary/Beneficiaries** or third parties involved in project implementation, as a consequence of implementation of the Agreement.
5. The **Beneficiary/Beneficiaries** shall bear sole responsibility for ensuring that its act(s) within the framework of this Agreement do not infringe third parties' rights.

6. There is no joint liability between the Contracting Parties. For this purpose, the **Beneficiary/Beneficiaries** shall indemnify and hold the Open Calls Coordinator any AID4SME consortium partner harmless from and against all repayments, loss, liability, costs, charges, claims or damages which the Open Calls Coordinator, any AID4SME consortium partner or the European Commission (EC) as a result thereof would incur or suffer or must pay to the EC or any third parties.
7. In addition, should the EC have a right of recovery against the AID4SME consortium regarding any or all the financial support granted under this Agreement, the Beneficiaries shall repay the sums in question in the terms and on the date specified by the Open Calls Coordinator.
8. The **Beneficiary's/Beneficiaries'** aggregate liability towards the other Contracting Party and the AID4SME consortium partners collectively shall be limited to the **Beneficiary's/Beneficiaries'** maximum financial contribution as identified in Article 4.1.

5.2 Exclusions of liability

1. To the extent acceptable under applicable law, in no event shall the Open Calls Coordinator or other AID4SME consortium partners be liable to the **Beneficiary/Beneficiaries** for loss or damage caused by the Open Calls Coordinator or the AID4SME consortium partners, their employees, agents and subcontractors in connection with this Agreement for any of the following, however caused or arising, on any theory of liability, and even if the Open Calls Coordinator and/or any other AID4SME consortium partner were informed or aware of the possibility thereof:
 - Loss of profits, revenue, income, interest, savings, shelf-space, production, and business.
 - Opportunities; lost contracts, goodwill, and anticipated savings.
 - Loss of or damage to reputation or to data.
 - Costs of recall of products.
 - Any type of indirect, incidental, punitive, special, or consequential loss or damage.
2. In respect of any information or materials from the AID4SME consortium made available to the **Beneficiary/Beneficiaries** under this Agreement, no warranty or representation of any kind is made, given, or implied as to the sufficiency, error-free performance, or fitness for purpose, nor as to the absence of any infringement of any proprietary rights of third parties. Therefore, in particular, but without limiting the foregoing:
 - The **Beneficiary/Beneficiaries** shall in all cases be entirely and solely liable for the use to which it puts such information and materials, and the consequences of such use, and
 - Neither the Open Calls Coordinator, the EC nor the other AID4SME consortium partners shall be liable vis-à-vis the **Beneficiary/Beneficiaries** in case of infringement of proprietary rights of a third party resulting from the **Beneficiary's/Beneficiaries'** use of the information and material.
 - The exclusions and limitations stated in this Article and any other clause of this Agreement that has as its object or effect the exclusion or limitation of liability, shall not

apply in respect of any: fraud; death, injury to natural persons or damage to real or immovable property caused by the negligence or wilful act, wilful misconduct, wilful breach; or otherwise in so far as mandatory applicable law overrides such exclusions and limitations.

Article 6 - Confidentiality

1. The Parties shall protect confidential information of whatever nature or form as is disclosed between the Contracting Parties in connection with the sub-granted project. The information identified as confidential should be provided in writing.
2. Specific rules and responsibilities regarding the use of confidential information shall be established in writing in a separate agreement, if needed.
3. The AID4SME Open Calls Coordinator may disclose confidential Information to the EC and/or the other AID4SME consortium partners if:
 - This is necessary to implement the GA or safeguard the EU's financial interests.
 - The recipients of the information are bound by an obligation of confidentiality.
4. The **Beneficiary/Beneficiaries** agree(s) and acknowledge that the EC shall be entitled to disclose confidential Information to its staff, other EU institutions and bodies or third parties, if:
 - This is necessary to implement the GA or safeguard the EU's financial interests.
 - The recipients of the information are bound by an obligation of confidentiality.
5. During the project implementation and for five (5) years following the ending of the AID4SME on 31 December 2032, the **Beneficiary/Beneficiaries** can not use any confidential information except as defined in this Agreement. The Parties will implement suitable measures to ensure confidentiality. The Parties will take the appropriate measures to guarantee the confidentiality of the information provided.

Article 7 - Intellectual property rights

1. The **Beneficiary/Beneficiaries** acknowledge(s) that all technologies, infrastructure and similar of the AID4SME consortium partners are proprietary and owned by the respective partner or applicable third party.
2. Nothing in this Agreement shall transfer to the **Beneficiary/Beneficiaries** (or other partners it represents) any licence or other rights for the use of the tools, modules and similar that are property of an AID4SME partner, unless a specific agreement is established.
3. The results developed during the sub-granted project shall be exclusively the property of the **Beneficiary/Beneficiaries**. This does not exclude the possibility for specific agreements to be made between the **Beneficiary/Beneficiaries** and one or more of the partners of AID4SME consortium.

Article 8 - Force Majeure

1. "Force Majeure" means any unforeseeable exceptional situation or event beyond the Contracting Parties control, which prevents either of them from fulfilling any of their obligations

under the Agreement, which was not attributable to error or negligence on their part, and which proves to be inevitable despite the exercising of all due diligence.

2. Any default of a service, defect in equipment or material or delays in making them available, unless they stem directly from a relevant case of force majeure, as well as labour disputes, strikes or financial difficulties cannot be invoked as Force Majeure.
3. The Contracting Parties shall take the necessary measures to limit any damage due to Force Majeure. They shall do their best to resume the implementation of the action as soon as possible.
4. No Contracting Party shall be in breach of its obligations and tasks if such a breach is caused by Force Majeure. A Contracting Party will notify the other Contracting Party of any Force Majeure as soon as possible. In case the **Beneficiary/Beneficiaries are/is** not able to overcome the consequences of Force Majeure within thirty calendar (30) days after such notification, the AID4SME Open Calls Coordinator will decide accordingly, including the termination of the Agreement.

Article 9 - Information and communication

9.1 Information and communication towards the EC

1. Throughout the duration of the sub-project, the **Beneficiary/Beneficiaries** must promote the project and its results by providing targeted information to multiple audiences (including the media and the public), as well as participate in the AID4SME promotion activities, in a strategic, coherent and effective manner.
2. The communication, dissemination activities and any infrastructure, equipment, vehicles, supplies or major result funded by the grant must acknowledge EU support and display the European emblem, AID4SME logo and include following disclaimer:

*"The **[sub-project acronym]** project has received funding from EC through the AID4SME (Grant Agreement no. 101189562)."*

"Funded by the European Union. Views and opinions expressed are however those of the author(s) only and do not necessarily reflect those of the European Union or European Commission. Neither the European Union nor the granting authority can be held responsible for them."

3. Apart from the emblem, no other visual identity or logo may be used to highlight the EU support. When displayed in association with other logos (e.g. of beneficiaries or sponsors), the emblem must be displayed at least as prominently and visibly as the other logos without first obtaining approval. This does not, however, give the right to exclusive use. Moreover, they may not appropriate the emblem or any similar trademark or logo, either by registration or by any other means.
4. The Open Calls Coordinator, the AID4SME consortium, and/or the EC shall be authorised to publish, in whatever form and on or by whatever medium, the following information: personal data, including the **Beneficiaries'/Beneficiary's** name, contact details, location, and project related information, for communication, publication and reporting purposes. This may also include, but is not limited to, using summaries, public deliverables, as well as any other material, such as pictures or audiovisual content/material provided by the **Beneficiary/Beneficiaries** (including in electronic form).

5. The **Beneficiary/Beneficiaries** shall make all efforts to ensure that all necessary authorisations for such publications have been obtained and that the publication of the information does not infringe any rights of third parties.
6. Upon a duly supported request by the Open Calls Coordinator on behalf of the **Beneficiary/Beneficiaries**, the EC may agree to forego such publicity if the disclosure of the information indicated above would risk compromising the **Beneficiary's/Beneficiaries'** security, academic or commercial interests.

9.2 Information and communication among the Contracting Parties

1. The contact details of the **Beneficiary/Beneficiaries** for notices and communication under this Agreement are:

Name of contact person	
Organisation name	
Role in the organisation	
Address	
E-mail	
Telephone/ mobile phone	

2. Any notice to be given under this Agreement shall be in writing, including e-mail communication, to the addresses and recipients listed above.
3. Any change of persons or contact details shall be notified immediately to the AID4SME Open Calls Coordinator. The address list shall be made accessible to all parties concerned.
4. The **Beneficiary/Beneficiaries** must immediately communicate any changes in the control of the organisation, including any replacement or removal of legal representatives identified in the initial F6S-required KYC check. An updated KYC form along with proof of ID and residence must be provided to reflect the changes. Any pending payments may be suspended until the KYC is cleared.
5. Any communication will be conducted in English as the only official language of this Agreement.

Article 10 – Checks, reviews, investigation, audits

1. The EC may, at any time during the implementation of the sub-project and up to five years after the end of the sub-project, arrange for checks, investigation, reviews and/or audits to be carried out, by external auditors, or by the EC services themselves, including the European Anti-Fraud office (OLAF). The procedure shall be deemed to be initiated on the date of receipt of the relevant letter sent by the EC.

2. There will be no financial checks, reviews, or audits to check costs, since the **Beneficiary/Beneficiaries** has/have no obligation to document the costs incurred for the action. Checks, reviews, and audits will focus on the technical implementation of the action.
3. The **Beneficiary/Beneficiaries** shall make available all information and data that may be requested by the EC or any representative authorised by it, to verify the compliance with sub-grant agreement.
4. To carry out checks, reviews, investigation, audits, the **Beneficiary/Beneficiaries** shall ensure that the EC's services and any external body(ies) authorised by it have on-the-spot access at all reasonable times, notably to the **Beneficiary's/Beneficiaries'** offices, to its computer data, and to all the information needed to carry out those checks. They shall ensure that the information is readily available on the spot during an audit and, if so requested, that data be handed over in an appropriate form.
5. Based on the findings made during the check, a provisional report shall be drawn up. It shall be sent by the EC or its authorised representative to the **Beneficiary/Beneficiaries** concerned, which may make observations thereon within one month of receiving it. The EC may decide not to take into account observations conveyed or documents sent after that deadline. The final report shall be sent to the **Beneficiary/Beneficiaries** concerned within two months of expiry of the aforesaid deadline.
6. Based on the conclusions of the check, the EC shall take all appropriate measures which it considers necessary, including the issuing of recovery orders regarding all or part of the payments made by it and the application of any applicable sanction.
7. The European Court of Auditors shall have the same rights as the EC, notably right of access, for the purpose of checks and audits, without prejudice to its own rules.

Article 11 – Data protection

1. The Contracting Parties have the obligation to abide by the Regulation (EU) 2016/679 (General Data Protection Regulation – GDPR) of the European Parliament and of the Council of 27 April 2016 on the protection of natural persons regarding the processing of personal data and on the free movement of such data.
2. Each Contracting Party shall each be considered a separate and independent data controller, as defined in the GDPR, to every other Contracting Party. The processing of personal data shall be carried out lawfully, fairly and in a transparent manner, collected for specific purposes and adequate, relevant, and limited to what is necessary in relation to the purposes for which it is processed. Where it might be designated by a relevant Supervisory Authority or through agreement between Contracting Parties that the AID4SME Open Calls Coordinator and any other AID4SME consortium partners are appointed as data processors, parties shall enter into appropriate data processing agreements as required by the GDPR.
3. The **Beneficiary/Beneficiaries** acknowledges that the AID4SME Open Calls Coordinator and any other AID4SME consortium partners, if appointed as data processors, are not responsible for the **Beneficiaries'/Beneficiary's** compliance with any data protection or privacy law applicable to the **Beneficiary/Beneficiaries**. Each of the Contracting Parties, in their respective

roles as data controllers, will be responsible for their own compliance with any data protection or privacy law applicable to them as data controller.

Article 12 - Miscellaneous

1. Should any provision of this Agreement be or become invalid, illegal, or unenforceable, it shall not affect the validity of the remaining provisions of this Agreement. In such a case, the Contracting Parties shall be entitled to request that a valid, legal, enforceable, and practicable replacement provision be negotiated which fulfils the purpose of the original provision.
2. The **Beneficiary/Beneficiaries** shall not be entitled to act or to make legally binding declarations on behalf of the Open Calls Coordinator or any other AID4SME consortium partner, and nothing in this Agreement shall be deemed to constitute a joint venture, agency, partnership, interest grouping or any other kind of formal business grouping or entity between the Contracting Parties or between the **Beneficiary/Beneficiaries** and any AID4SME consortium partner.
3. No rights or obligations of the **Beneficiary/Beneficiaries** arising from this Agreement may be assigned or transferred, in whole or in part, and no obligations of the **Beneficiary/Beneficiaries** may be subcontracted, without the Open Calls Coordinator's prior formal written approval; and such approval shall not exempt the **Beneficiary/Beneficiaries** from any of its obligations hereunder.
4. Although (with exception to the Open Calls Coordinator) the AID4SME consortium partners and their affiliated entities are not Contracting Parties to this Agreement, they are intended by the Contracting Parties to be third party beneficiaries under this Agreement and accordingly shall be entitled to enforce the terms of this Agreement against the **Beneficiary/Beneficiaries** and (without limitation) shall be entitled to the benefit from, and to enforce any exclusion of limitation of liability of the AID4SME consortium partners contained in this Agreement and any indemnity in favour of the AID4SME consortium partners contained in this Agreement.
5. Amendments and modifications to the text of this Agreement require a separate written agreement to be signed between all Parties.
6. This Agreement is drawn up in English language which shall govern all documents, notices, meetings, and processes relative thereto.

Article 13 - Ethics

1. The **Beneficiary/Beneficiaries** must implement the project line with the highest ethical standards and the applicable EU, international and national law on ethical principles.

Article 14 - Applicable Law

1. This Agreement shall be construed in accordance with and governed by the laws of Ireland.

Article 15 - Settlement of disputes

1. If the Contracting Parties are unable to resolve a dispute amicably, such dispute will be finally settled under the Rules of Arbitration of the International Chamber of Commerce by three (3) arbitrators in Ireland.

2. Nothing in this Agreement shall limit the Contracting Parties right to seek injunctive relief or to enforce an arbitration award in any applicable competent court of law.

AS WITNESS:

The Contracting Parties have caused this Agreement to be duly signed by the undersigned authorised representatives the day and year written below:

For F6S EU Tech Innovation Network DAC (AID4SME Open Calls Coordinator) Nuno Varandas Director <i>Signature</i>	For Lead Partner name (%Sub-grant ProjectAcronym% Lead Beneficiary) Name of representative, as on first page Position <i>Signature</i>
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COMPLEMENTARY ANNEXES

Annex 1: Guide for Applicants

Annex 2: Proposal

Annex 4/5: Declaration of Honour/Consortium Declaration of Honour

Annex 6: SME Declaration (if applicable)

TEMPLATE

Annex 4. Declaration of Honour Template



AID4SME | Open Call #2

Annex 4. Declaration of Honour Template

Version 1.0 – 2026.05.13

Disclaimer

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APPLICANT DECLARATION OF HONOUR

Project title: _____

Project acronym: _____

On behalf of _____ [Company/ organisation name] established in _____ [Official address], VAT number¹ _____, represented for the purposes of signing and submitting the proposal and present Declaration of Honour by _____ [Name of legal representative].

By signing this document, I declare that:

1. I have the power of legally binding the above-mentioned organisation upon submitting this proposal.
2. Neither the above-mentioned company/ organisation nor any linked company/ organisation or any individual member of the proposal team has submitted any other proposal under the AID4SME Open Call #2. In case the above-mentioned company/ organisation or any individual member of the team has submitted more than one proposal to this open call, all associated proposals will be automatically excluded from the evaluation process.
3. I and the above company/ organisation that I legally represent are fully aware and duly accept all AID4SME Open Call #2 rules and conditions as expressed in the respective open call documents and Annexes and will respect any evaluation decision and proposal selection.
4. The information included in the Annex 6: SME Declaration document is true and legally binding (*applicable to SMEs*).
5. All provided information in this declaration is true and legally binding.
6. I give the consent and permission to the AID4SME Open Calls Coordinator to use the attached information to contact me for any issue associated with the associated proposal.

¹ VAT is mandatory during the contract preparation. Failure to provide a valid VAT of the specific SME will result in automatic rejection of the proposal.

Company/ organisation contact information:

Title (Mr., Ms., Dr.)	
First Name	
Last Name	
Entity Full address	
Country	
E-mail address	
Telephone/ Mobile phone	
Signature/ Date	

Declaration of Honour on exclusion criteria and absence of conflict of interest

By signing this declaration of honour, I declare that all provided information below is true and legally binding both for me and for the company/ organisation that I legally represent:

1. I declare that the mentioned company/ organisation is not in one of the following situations:
 - a. Is bankrupt or being wound up, is having its affairs administered by the courts, has entered an arrangement with creditors, has suspended business activities, is the subject of proceedings concerning those matters, or is in any analogous situation arising from a similar procedure provided for in national legislation or regulations.
 - b. It or persons having powers of representation, decision making or control over it have been convicted of an offence concerning their professional conduct by a judgment which has the force of res judicata.
 - c. Has been guilty of grave professional misconduct proven by any means which the contracting authority can justify including by decisions of the European Investment Bank and international organizations.
 - d. Is not in compliance with its obligations relating to the payment of social security contributions or the payment of taxes in accordance with the legal provisions of the country in which it is established or with those of the country of the contracting authority or those of the country where the contract is to be performed, to be proved by the deliverance of official documents issued by the local authorities, according to the local applicable rules.
 - e. It or persons having powers of representation, decision making or control over it have been the subject of a judgment which has the force of res judicata for fraud, corruption, involvement in a criminal organization or any other illegal activity, where such illegal activity is detrimental to the Union's financial interests.
 - f. Is subject to an administrative penalty for being guilty of misrepresenting the information required by the contracting authority as a condition of participation in a grant award procedure or another procurement procedure or failing to supply this information or having been declared to be in serious breach of its obligations under contracts or grants covered by the Union's budget.
2. I declare that the natural persons with power of representation, decision-making or control over the above-mentioned company/ organisation are not in the situations referred to in (a) to (f) above.
3. I declare that:
 - a. Neither any person nor I that I know is subject to an AID4SME project conflict of interest.
 - b. Neither any person or I that I know participates, controls, submits, or is associated in any way with more than one proposal to the AID4SME Open Call #2.
 - c. I have not made false declarations in supplying the information required by participation in the open calls of the AID4SME project or does not fail to supply this information.

- d. I am not in one of the situations of exclusion, referred to in the abovementioned points (a) to (f).
- e. I am aware and fully accept all AID4SME Open Call #2 conditions and rules as expressed in the open call documents and Annex 1, Annex 2, Annex 3.

4. I certify that the company/ organisation that I represent:

- a. Is committed to participate in the abovementioned project.
- b. Has stable and sufficient sources of funding to maintain its activity throughout its participation in the above-mentioned project and to provide any counterpart funding necessary.
- c. Has or will have the necessary resources as and when needed to carry out its involvement in the above-mentioned project.

Full name: 	Signature and stamp (if applicable)
Done at (place) , on the (day) (month) (year)	

Annex 5. Consortium Declaration of Honour Template



AID4SME | Open Call #2

Annex 5. Consortium Declaration of Honour Template

Version 1.0 – 2026.05.13

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CONSORTIUM DECLARATION OF HONOUR

Proposal Title:

Proposal Acronym:

BETWEEN

[Company/ organisation name] established in [address], VAT number [VAT number], represented for the purposes of signing and submitting the proposal and the Consortium Declaration of Honour by [Name of legal representative];

AND

[Company/ organisation name] established in [address], VAT number [VAT number], represented for the purposes of signing and submitting the proposal and the Consortium Declaration of Honour by [Name of legal representative];

It is hereby agreed that:

- All information provided is true and legally binding.
- Partner [Consortium leader name] is acting on behalf the following partner(s) as the consortium leader:
 - Partner 2: [Company/ organisation name]
- The consortium entities have agreed on their roles and budget shares.
- The consortium leader is solely responsible for distributing the budget shares to the other consortium partners in accordance with this Consortium Declaration of Honour.
- The AID4SME consortium bears no responsibility in case a partner of this project consortium violates the mutual agreement set in this Consortium Declaration of Honour.
- The AIDeSME consortium bears no responsibility in the case of dispute among consortium partners regarding intellectual property rights.
- By signing this Consortium Declaration of Honour, all consortium partners declare that they – individually or as a consortium – may have up to 1 proposal evaluated under this open call, but only one will be – if successfully evaluated – accepted for funding. Any entity, applying solely or as part of a consortium, may only be funded for one project.
- By signing this Consortium Declaration of Honour, all consortium partners declare that they are not members of any other competitive consortium in the AID4SME Open Call #2. In case, an applicant participates in more than one consortium, both consortia will be excluded.
- By signing and submitting this Consortium Declaration of Honour, the consortium partners accept all the rules explained in Annex 1. Guide for Applicants of AID4SME Open Call #2.
- All partners declare not being in one of the following situations:
 - a) it is bankrupt or being wound up, is having its affairs administered by the courts, has entered into an arrangement with creditors, has suspended business activities, is the subject of proceedings concerning those matters, or is in any analogous situation arising from a similar procedure provided for in national legislation or regulations;

- b) it or persons having powers of representation, decision making or control over it have been convicted of an offence concerning their professional conduct by a judgment which has the force of res judicata;
 - c) it has been guilty of grave professional misconduct proven by any means which the contracting authority can justify including by decisions of the European Investment Bank and international organizations;
 - d) it is not in compliance with its obligations relating to the payment of social security contributions or the payment of taxes in accordance with the legal provisions of the country in which it is established or with those of the country of the contracting authority or those of the country where the contract is to be performed;
 - e) it or persons having powers of representation, decision making or control over it have been the subject of a judgment which has the force of res judicata for fraud, corruption, involvement in a criminal organization or any other illegal activity, where such illegal activity is detrimental to the Union's financial interests;
 - f) is subject to an administrative penalty for being guilty of misrepresenting the information required by the contracting authority as a condition of participation in a grant award procedure or another procurement procedure or failing to supply this information or having been declared to be in serious breach of its obligations under contracts or grants covered by the Union's budget.
- Each partner declares that:
 - g) is not subject to a conflict of interest;
 - h) has not made false declarations in supplying the information required by the as a condition of participation in the AID4SME Open Call #2 or does not fail to supply this information;
 - i) is not in one of the situations of exclusion, referred to in the abovementioned points a) to f).
 - j) Is aware and fully accepts all AID4SME Open Call #2 conditions and rules as expressed in AID4SME Open Call #2 open call documents Annex 1, Annex 2 and Annex 3.
 - Each partner certifies that:
 - is committed to participate in the abovementioned project;
 - has stable and sufficient sources of funding to maintain its activity throughout its participation in the above-mentioned project and to provide any counterpart funding necessary;
 - has or will have the necessary resources as and when needed to carry out its involvement in the above-mentioned project.

Consortium leader

Company/organisation name	
Full address	
Country	
Name of legal representative	
Position in the company/organisation	
Project Total Costs share	_____ EUR
Maximum contribution requested share	_____ EUR
I have the power of legally binding the abovementioned company/organisation on submitting this proposal	
Legal representative signature and stamp (stamp if applicable)	
Done at (place) _____	
The (day) _____ (month) _____ (year) _____	

Consortium partner no. 2 (if applicable)

Company/organisation name	
Full address	
Country	
Name of legal representative	
Position in the company/organisation	
Project Total Costs share	_____ EUR
Maximum contribution requested share	_____ EUR
I have the power of legally binding the abovementioned company/organisation on submitting this proposal	
Legal representative signature and stamp (stamp if applicable)	
Done at (place) _____	
The (day) _____ (month) _____ (year) _____	

Annex 6. SME Declaration Template



AID4SME | Open Call #2

Annex 6. SME Declaration Template

Version 1.0 – 2026.05.13

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DECLARATION ON INFORMATION ON SME QUALIFICATION

Specific identification of the applicant enterprise:

Name or Business Name	
Address (or Registered office)	
Registration/ VAT number	
Names and titles of principal directors	

Type of enterprise (see explanatory note)

Select to indicate which case(s) applies to the applicant enterprise:

- ☐ **Autonomous enterprise** In this case the data filled in the box below result from the accounts of the applicant enterprise only. Fill in the declaration only, without annex.
- ☐ **Partner enterprise** Fill in and attach the annex (and any additional sheets), then complete the declaration by copying the results of the calculations into the box below.
- ☐ **Linked enterprise**

Data used to determine the category of enterprise

Calculated according to Article 6 of the Annex to the Commission Recommendation 2003/361/EC on the SME definition.

Reference period (*)		
Headcount (AWU)	Annual turnover (**)	Balance sheet total (**)

(*) All data must be related to the last approved accounting period and calculated on an annual basis. In the case of newly established enterprises whose accounts have not yet been approved, the data to apply shall be derived from a reliable estimate made over the financial year.

(**) EUR 1 000.

Important:

Compared to the previous accounting period, there is a change regarding the data, which could result in a change of category of the applicant enterprise (micro, small, medium-sized, or big enterprise).

☐ **No**

☐ **Yes** (in this case fill in and attach a declaration regarding the previous accounting period).

Signature

Name and position of the signatory, being authorised to represent the enterprise:

--

I declare on my honour the accuracy of this declaration and of any annexes thereto.

Done at: (place) on (day) (month) (year)

Signature:

EXPLANATORY NOTE ON THE TYPES OF ENTERPRISES TAKEN INTO ACCOUNT FOR CALCULATING THE HEADCOUNT AND THE FINANCIAL AMOUNTS

I. TYPES OF ENTERPRISES

The definition of an SME¹ distinguishes three types of enterprise, according to their relationship with other enterprises in terms of holdings of capital or voting rights or the right to exercise a dominant influence².

Type 1: Autonomous Enterprise

This is by far the most common type of enterprise. It applies to all enterprises which are not one of the two other types of enterprise (partner or linked). An applicant enterprise is autonomous if it:

- Does not have a holding of 25%³ or more in any other enterprise,
- And is not 25%³ or more owned by any enterprise or public body or jointly by several linked enterprises or public bodies, apart from some exceptions⁴,
- And does not draw up consolidated accounts and is not included in the accounts of an enterprise which draws up consolidated accounts and is thus not a linked enterprise⁵.

Type 2: Partner Enterprise

This type represents the situation of enterprises which establish major financial partnerships with other enterprises, without the one exercising effective direct or indirect control over the other. Partners are enterprises which are not autonomous, but which are not linked to one another.

The applicant enterprise is a partner of another enterprise if:

- It has a holding or voting rights equal to or greater than 25% in the other enterprise, or the other enterprise has a holding or voting rights equal to or greater than 25% in the applicant enterprise.

¹ Henceforth, the term "Definition" refers to the Annex to Commission Recommendation 2003/361/EC on the definition of SMEs.

² Definition, Article 3

³ In terms of the share of the capital or voting rights, whichever is higher is applied. To this percentage should be added the holding in that same enterprise of each enterprise that is linked to the holding company (Definition, Article 3 paragraph 2)

⁴ An enterprise may continue being considered as autonomous when this 25% threshold is reached or exceeded, if that percentage is held by the following categories of investors (provided that those are not linked with the applicant enterprise):

- a) public investment corporations, venture capital companies, individuals or groups of individuals with a regular venture capital investment activity who invest equity capital in unquoted businesses ("business angels"), provided the total investment of those business angels in the same enterprise is less than EUR 1 250 000,
- b) universities or non-profit research centres,
- c) institutional investors, including regional development funds,
- d) autonomous local authorities with an annual budget of less than EUR 10 million and less than 5000 inhabitants.

(Definition, Article 3 paragraph 2, second sub-paragraph)

⁵ - If the registered office of the enterprise is situated in a Member State which has provided for an exception to the requirement to draw up such accounts pursuant to the Seventh Council Directive 83/349/EEC of 13 June 1983, the enterprise should nevertheless check specifically whether it does not meet one or other of the conditions laid down in Article 3 paragraph 3 of the Definition.

- There are also some very rare cases in which an enterprise may be considered linked to another enterprise through a person or a group of natural persons acting jointly (Definition, Article 3 paragraph 3).

- Conversely, there are very few cases of enterprises drawing up consolidated accounts voluntarily, without being required to do so under the Seventh Directive. In that case, the enterprise is not necessarily linked and can consider itself only a partner.

To determine whether the enterprise is linked or not, in each of the three situations it should be checked whether or not the enterprise meets one or other of the conditions laid down in Article 3 paragraph 3 of the Definition, where applicable through a natural person or group of natural persons acting jointly.

- The enterprises are not linked enterprises within the meaning defined below, which means, among other things, that the voting rights of one in the other do not exceed 50%.
- And the applicant enterprise does not draw up consolidated accounts which include the other enterprise by consolidation and is not included by consolidation in the accounts of the other enterprise or of an enterprise linked to it⁵.

Type 3: Linked Enterprise

This type corresponds to the economic situation of enterprises which form a group through the direct or indirect control of most of the voting rights (including through agreements or, in certain cases, through natural persons as shareholders), or through the ability to exercise a dominant influence on an enterprise. Such cases are thus less frequent than the two preceding types.

To avoid difficulties of interpretation for enterprises, the EC has defined this type of enterprise by taking over – wherever they are suitable for the purposes of the Definition – the conditions set out in Article 1 of Council Directive 83/349/EEC on consolidated accounts⁶, which has been applied for many years.

An enterprise thus generally knows immediately that it is linked, since it is already required under that Directive to draw up consolidated accounts or is included by consolidation in the accounts of an enterprise which is required to draw up such consolidated accounts.

The only two cases, which are however not very frequent, in which an enterprise can be considered linked although it is not already required to draw up consolidated accounts, are described in the first two indents of endnote 5 of this explanatory note. In those cases, the enterprise should check whether it meets one or other of the conditions set out in Article 3 paragraph 3 of the Definition.

II. THE HEADCOUNT AND THE ANNUAL WORK UNITS⁷

The headcount of an enterprise corresponds to the number of annual work units (AWU).

Who is included in the headcount?

- The employees of the applicant enterprise
- persons working for the enterprise being subordinate to it and considered to be employees under national law
- owner-managers
- partners engaging in a regular activity in the enterprise and benefiting from financial advantages from the enterprise.

Apprentices or students engaged in vocational training with an apprenticeship or vocational training contract are not considered in the headcount.

How is the headcount calculated?

One AWU corresponds to one person who worked full-time in the enterprise in question or on its behalf during the entire reference year. The headcount is expressed in AWUs.

The work of persons, who did not work the entire year, or who worked part-time - regardless of its duration - and seasonal work is counted as fractions of AWU.

The duration of maternity or parental leaves is not counted.

⁶ Seventh Council Directive 83/349/EEC of 13 June 1983, based on Article 54(3)(g) of the Treaty and concerning consolidated accounts (OJ L 193 of 18.7.1983, p. 1), as last amended by Directive 2001/65/EC of the European Parliament and of the Council (OJ L 283 of 27.10.2001, p. 28).

⁷ Definition, Article 5.

ANNEX TO THE DECLARATION CALCULATION FOR THE PARTNER OR LINKED TYPE OF ENTREPRISE

Annexes to be enclosed if necessary

- **Annex A** if the applicant enterprise has at least one partner enterprise (and any additional sheets)
- **Annex B** if the applicant enterprise has at least one linked enterprise (and any additional sheets)

Calculation for the partner or linked type of enterprise⁸ (see explanatory note)

Reference period ⁹ :			
	Headcount (AWU)	Annual turnover (*)	Balance sheet total (*)
1. Data ⁹ of the applicant enterprise or consolidated accounts (copy data from box B(1) in annex B ¹⁰)			
2. Proportionally aggregated data ⁹ of all partner enterprises (if any) (copy data from box A in annex A)			
3. Added up data ⁹ of all linked enterprises (if any) – if not included by consolidation in line 1 (copy data from box B(2) in annex B)			
Total			
(*) EUR 1 000.			

NOTE: The data entered in the "Total" row of the above table should be entered in the box "Data used to determine the category of enterprise" in the declaration.

⁸ Definition, Article 6 paragraphs 2 and 3

⁹ All data must be relating to the last approved accounting period and calculated on an annual basis. In the case of newly-established enterprises whose accounts have not yet been approved, the data to apply shall be derived from a reliable estimate made in the course of the financial year (Definition, Article 4).

¹⁰ The data of the enterprise, including the headcount, are determined on the basis of the accounts and other data of the enterprise or, where they exist, the consolidated accounts of the enterprise, or the consolidated accounts in which the enterprise is included through consolidation.

ANNEX A

Partner enterprises

For each enterprise for which a 'partnership sheet' has been completed (one sheet for each partner enterprise of the applicant enterprise and for any partner enterprises of any linked enterprise, of which the data is not yet included in the consolidated accounts of that linked enterprise), the data in the 'partnership box' in question should be entered in the summary table below:

BOX A

Partner enterprise (name / identification)	Headcount (AWU)	Annual turnover (*)	Balance sheet total (*)
1.			
2.			
3.			
4.			
5.			
6.			
7.			
Total			

(*) EUR 1 000.

(attach sheets or expand the present table, if necessary)

Reminder:

This data is the result of a proportional calculation done on the 'partnership sheet' for each direct or indirect partner enterprise.

The data entered in the "Total" row of the above table should be entered in line 2 (regarding partner enterprises) of the table in the Annex to the declaration.

PARTNERSHIP SHEET

1. Specific identification of the applicant enterprise

Name or Business Name	
Address (or Registered office)	
Registration/ VAT number¹¹	
Names and titles of principal directors¹²	

2. Raw data regarding that partner enterprise

Reference period			
	Headcount (AWU)	Annual turnover (*)	Balance sheet total (*)
Raw data			
(*) EUR 1 000.			

Reminder: These raw data are derived from the accounts and other data of the partner enterprise, consolidated if they exist. To those are added 100% of the data of enterprises which are linked to this partner enterprise, unless the accounts data of those linked enterprises are already included through consolidation in the accounts of the partner enterprise¹³. If necessary, add “linkage sheets” for the enterprises which are not yet included through consolidation.

3. Proportional calculation

- a) Precisely indicate the holding¹⁴ of the enterprise drawing up the declaration (or of the linked enterprise via which the relation to the partner enterprise is established) in the partner enterprise to which this sheet relates:

Also indicate the holding of the partner enterprise to which this sheet relates in the enterprise drawing up the declaration (or in the linked enterprise):

- b) The higher of these two holding percentages should be applied to the raw data entered in the previous box. The results of this proportional calculation should be given in the following table:

‘Partnership box’

¹¹ To be determined by the Member State according to its needs

¹² Chairman (CEO), Director-General or equivalent.

¹³ Definition, Article 6 paragraph 3, first sub-paragraph

¹⁴ In terms of the share of the capital or voting rights, whichever is higher. To this holding should be added the holding of each linked enterprise in the same enterprise (Definition, Article 3 paragraph 2 first sub-paragraph).

Percentage:	Headcount (AWU)	Annual turnover (*)	Balance sheet total (*)
Proportional results			
(*) EUR 1 000.			

These data should be entered in Box A in Annex A.

TEMPLATE

ANNEX B

Linked enterprises

DETERMINE THE CASE APPLICABLE TO THE APPLICANT ENTERPRISE:

☐ **Case 1:** The applicant enterprise draws up consolidated accounts or is included by consolidation in the consolidated accounts of another enterprise. (Box B(1))

☐ **Case 2:** The applicant enterprise or one or more of the linked enterprises do not establish consolidated accounts or are not included in the consolidated accounts. (Box B(2)).

Please note: The data of the enterprises, which are linked to the applicant enterprise, are derived from their accounts and their other data, consolidated if they exist. To them are aggregated proportionally the data of any possible partner enterprise of that linked enterprise, situated immediately upstream or downstream from it, unless it has already been included through consolidation¹⁵.

CALCULATION METHODS FOR EACH CASE:

In case 1: The consolidated accounts serve as the basis for the calculation. Fill in Box B(1) below.

Box B(1)

	Headcount (*)	Annual turnover (**)	Balance sheet total (**)
Total			

(*) Where in the consolidated accounts no headcount data appears, the calculation of it is done by adding the data from the enterprises to which the enterprise in question is linked.

(**) EUR 1 000.

The data entered in the "Total" row of the above table should be entered in line 1 of the table in the Annex to the declaration.

Identification of the enterprises included through consolidation

Linked enterprise (name / identification)	Address (of registered office)	Registration / VAT number (*)	Names and titles of the principal director(s) (**)
1.			
2.			
3.			
4.			
5.			
6.			

¹⁵ Definition, Article 6 paragraph 3, second sub-paragraph

Identification of the enterprises included through consolidation			
Linked enterprise (name / identification)	Address (of registered office)	Registration / VAT number (*)	Names and titles of the principal director(s) (**)
7.			
Total			

(*) To be determined by the Member State according to its needs

(**) Chairman (CEO), Director-General or equivalent.

Important: Partner enterprises of such a linked enterprise, which are not yet included through consolidation, are treated like direct partners of the applicant enterprise. Their data and a 'partnership sheet' should therefore be added in Annex A.

In case 2: For each linked enterprise (including links via other linked enterprises), complete a "linkage sheet" and simply add together the accounts of all the linked enterprises by filling in Box B(2) below.

Box B(2)			
Enterprise No.:	Headcount (AWU)	Annual turnover (**)	Balance sheet total (**)
1. (*)			
2. (*)			
3. (*)			
Total			

(*) attach one "linkage sheet" per enterprise

(**) EUR 1 000.

The data entered in the "Total" row of the above table should be entered in line 3 (regarding linked enterprises) of the table in the Annex to the declaration.

LINKAGE SHEET

(only for linked enterprises not included by consolidation in Box B)

1. Precise identification of the applicant enterprise

Name or Business Name	
Address (or Registered office)	
Registration/ VAT number¹⁶	
Names and titles of principal directors¹⁷	

2. Data on enterprise

Reference period			
	Headcount (AWU)	Annual turnover (*)	Balance sheet total (*)
Total			
(*) EUR 1 000.			

These data should be entered in Box B(2) in Annex B.

Important: The data of the enterprises, which are linked to the applicant enterprise, are derived from their accounts and their other data, consolidated if they exist. To them are aggregated proportionally the data of any possible partner enterprise of that linked enterprise, situated immediately upstream or downstream from it, unless it has already been included through consolidation¹⁸.

Such partner enterprises are treated like direct partner enterprises of the applicant enterprise. Their data and a 'partnership sheet' have therefore to be added in Annex A.

¹⁶ To be determined by the Member State according to its needs

¹⁷ Chairman (CEO), Director-General or equivalent.

¹⁸ If the data of an enterprise are included in the consolidated accounts to a lesser proportion than the one determined under Article 6 paragraph 2, the percentage rate according to that article should be applied (Definition, Article 6 paragraph 3, second sub-paragraph).

Annex 7. Application Form Read-only



AID4SME | Open Call #2

Annex 7. Application Form Read-only

Version 1.0 – 2026.05.13

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AID4SME Open Call #2

The application form is part of the AID4SME Open Call #2 managed by the AID4SME Project.

The application form has the following compulsory sections:

- SECTION 1. Proposal Identification
- SECTION 2. Challenge
- SECTION 3. Applicants Information
- SECTION 4. Budget
- SECTION 5. Proposal
- SECTION 6. Requirements to Join the Programme

The call documentation kit can be consulted at <https://aid4sme.eu/open-call-2/>

Relevant files for the Submission Stage:

- Annex 1. Guidelines for Applicants
- Annex 1.1 Challenges Description
- Annex 2. Proposal Template
- Annex 7. Application form (read only)

Documents to be submitted during the Contracting Stage:

- Annex 3. Sub-grant agreement template (read only)
- Annex 4. Declaration of Honour template (read only)
- Annex 5. Consortium Declaration of Honour template (read only)
- Annex 6. Declaration of SME status template (read only)

If you have any questions, feel free to contact the AID4SME Helpdesk at aid4sme_ocs_helpdesk@f6s.com

Failure to provide the required information in all sections will result in disqualification.

All information included and submitted as part of this application is classified as sensitive information.

Note: Application form is automatically saved.

* mandatory

SECTION 1. PROPOSAL IDENTIFICATION

1. Proposal title*

2. Proposal acronym*

3. Proposal summary*

Note that if your proposal is selected for funding, the below summary will be published on the AID4SME website.

Maximum of 2000 characters

2000 characters

SECTION 2. CHALLENGE

4. Indicate the AID4SME Open Call #2 challenge that your application addresses*

Ensure that the selected challenge below matches the information available in the proposal template.

Further information is available in Annex 1.1 Challenges Description (<https://aid4sme.eu/open-call-2/>)

- C1.1 Augmented sensing solution
- C2.1 Product-production Digital Twins
- C2.2 Automated monitoring hygiene inspection for refurbishment
- C2.3 Energy system Digital Twin decision support tool
- C3.2 Automated machine selection for parts production
- C3.3 Battery production digitalwork instructions & skill capturing
- C3.4 Automated warehouse and internal logistics management
- C4.1 Smart energy management of unplanned machine downtime
- C4.3 Semi-automated EV battery disassembly for recycling
- C4.4 Co-bot refrigerator door assembly solutions

5. Describe how the proposed solution is aligned to the above selected challenge*

Note that the In/out challenge scope (section 5.2 In/out challenge scope check of the Guidelines for Applicants) will be performed based on the information below.

Maximum 5000 characters

5000 characters

SECTION 3. APPLICANT(S) INFORMATION

Applicant 1 - Lead Beneficiary (Coordinator)

A1 - Entity Details

6. A1 - Entity legal name*

Please provide the official legal name of the organization/entity

7. A1 - Type of organization*

As defined in section 4.1.1 and 4.1.2 of the Guidelines for Applicants. Note that only SMEs & Startups can lead the applications under the AID4SME Open Call #2.

- SME & Startup
- Industry organisations
- Integrators / engineering services
- Research institutions & research infrastructures
- Non-profit organisations and charitable (scientific) foundations
- Public research centres & university

8. A1 - VAT number***9. A1 - PIC number**

9-digit Participant Identification Code (PIC). If you don't have a PIC number you can register for one at <https://ec.europa.eu/info/funding-tenders/opportunities/portal/screen/how-to-participate/participant-register>

10. A1 - Country***11. A1 - Website****A1 - Main contact person****12. A1 - Title**

- Mr
- Mrs
- Ms
- Dr
- Prof

13. A1 - First Name*

14. A1 - Last Name*

15. A1 - Role in the entity*

16. A1 - Email address*

Applicant 2 - Beneficiary (if applicable)*If not applicable, reply NA***A2 - Entity Details**

17. A2 - Entity legal name*

Please provide the official legal name of the organization/entity

18. A2 - Type of organization*

As defined in section 4.1.1 and 4.1.2 of the Guidelines for Applicants. Note that only SMEs & Startups can apply for funding within the AID4SME Open Call #2.

- SME & Startup
- Industry organisations
- Integrators / engineering services
- Research institutions & research infrastructures
- Non-profit organisations and charitable (scientific) foundations
- Public research centres & university
- NA

19. A2 - VAT number*

20. A2 - PIC number

21. A2 - Country*

22. A2 - Website

A2 - Main contact person

23. A2 - Title*

- Mr
- Mrs
- Ms
- Dr
- Prof
- NA

24. A2 - First Name*

25. A2 - Last Name*

26. A2 - Role in the entity*

27. A2 - Email address*

SECTION 4. BUDGET**Applicant 1 - Lead Beneficiary**

28. A1 - Total project costs (EUR)*

29. A1 - Funding rate*

- 70%

30. A1 - Total contribution requested (EUR)*

*A1 Total Contribution Requested = A1 Total Project Costs * A1 Funding rate*

Applicant 2 - Beneficiary (if applicable)*If not applicable, reply NA*

31. A2 - Total project costs (EUR)*

32. A2 - Funding rate*

- 70%
- NA

33. A2 - Total contribution requested (EUR)*

*A2 Total Contribution Requested = A2 Total Project Costs * A2 Funding rate***Consortium**

34. Total project costs (EUR)

Total Project Costs = A1 Total Project Costs + A2 Total Project Costs (if applicable)

35. Total contribution requested (EUR)

*Total Contribution Requested = A1 Total Contribution Requested + A2 Total Contribution Requested (if applicable). Total maximum contribution requested per project cannot exceed EUR 200 000.00 as per Section 4.3 of the Guidelines for Applicants***SECTION 5 - PROPOSAL****36. Upload here your proposal in pdf format***

Use the mandatory AID4SME Open Call #2 Proposal template (Annex 2) available at <https://aid4sme.eu/open-call-2/>. Before submitting, check if you have: (1) Respected the formatting requirements, including the page limit; (2) Provided information for all the required sections.

Note: Proposals using another template will be disqualified. Any additional pages exceeding the defined limit will not be evaluated. Failure to meet the requirements will lead to proposal disqualification.

Upload file

SECTION 6. REQUIREMENTS TO JOIN THE PROGRAMME

37. By clicking, you ACCEPT the conditions of the programme (available at <https://aid4sme.eu/open-call-2/>) and confirm that you have read the privacy policy (available at <https://www.f6s.com/privacy-policy-participants>) and agree to the processing of your personal data for these purposes.

- I ACCEPT

38. DECLARATION OF HONOUR: By clicking, you CONFIRM that you accept all the conditions in the Declaration of Honour and information contained therein, and that it will be provided signed and stamped should this proposal be accepted for funding.*

- I CONFIRM

39. CONSORTIUM DECLARATION OF HONOUR: By clicking, you CONFIRM that you represent all consortium partners that accept all the conditions in the Consortium Declaration of Honour and information contained therein, and that it will be provided, signed and stamped by all partners should this proposal be accepted for funding.*

- I CONFIRM

40. SME DECLARATION: By clicking, you CONFIRM that the company(ies) involved in the proposal is(are) a valid SME following established EU rules, whose validity will be proved with a signed and stamped declaration to be provided should this proposal be accepted for funding.*

- I CONFIRM

41. By clicking, you ACCEPT that the information provided and submitted in this proposal can be shared by F6S with the AID4SME consortium for the purposes of managing the programme.*

- I ACCEPT

Annex 8. Frequently Asked Questions



AID4SME | Open Call #2

Frequently Asked Questions

Version 1.0 – 2026.05.15

Disclaimer

Funded by the European Union. Views and opinions expressed are however those of the author(s) only and do not necessarily reflect those of the European Union or European Commission. Neither the European Union nor the granting authority can be held responsible for them.

1. What is the AID4SME project?

AID4SME is a European project under the Horizon Europe Programme (HORIZON-CL4-2024-DIGITALEMERGING-01) – Grant Agreement no. 101189562. The 36-month project kicked-off in December 2024 and counts 16 partners from multiple sectors and European countries.

AID4SME aims to facilitate Small and Medium-sized Enterprises (SMEs) in developing combined Artificial Intelligence (AI) and data solutions for large scale resource optimisation challenges for industries that have significant impact on the objectives of the Green Deal.

2. What does the AID4SME Open Call #2 offer?

The Open Call is the competitive process by which eligible applicants apply to have access to the AID4SME programme.

The programme will select up to 12 innovative applications, each addressing one of the challenges/topics, providing a maximum contribution of EUR 200 000.00, to be paid in form of lump sums at the end of periods 1, 2 and 3 (30% + 40% + 30%).

The indicative budget for AID4SME - Open Call #2 is EUR 2 350 000.00.

3. What is the deadline for submitting applications for the AID4SME Open Call #2?

The deadline for the AID4SME Open Call #2 is Wednesday, 15 July 2026 at 17:00 Brussels time.

4. What is the maximum contribution a project may request under the AID4SME Open Call #2?

The maximum contribution a project may request is EUR 200 000.00. This amount must represent 70% (funding rate) of the total project costs.

5. Are SMEs and Start-ups focusing on technologies relevant to the AID4SME Open Call #2 eligible for this opportunity?

Yes, Start-ups, and Micro, small and medium-sized enterprises (SMEs) working on related technologies of the AID4SME Open Call #2 are eligible within this call. They may apply as a single entity project or within a consortium of up to 2 entities.

6. Is there any restriction on the consortium size for the AID4SME Open Call #2?

Yes, eligible applicants may apply to the AID4SME Open Call #2 as a single entity or within a consortium of up to 2 entities.

7. Are there any other type of entities that may apply to the AID4SME Open Call #2?

Yes, other entities may be part of a consortium led by a SME and/or startup, however without requesting financial support, such as:

- Industry organisations providing the SMEs / Start-ups use-cases and high-TRL playgrounds for solution testing and validation;

- Integrators/ engineering services that support the SMEs / Start-ups in integration of the solutions;
- Research institutions, research infrastructures, non-profit organisations and charitable (scientific) foundations and public research centres.

8. My entity was invited to participate as an Industry organisation, Integrators/ engineering services, or Research institutions, research infrastructures, non-profit organisations and charitable (scientific) foundations and public research centres. May I apply for financial support for the AID4SME Open Call #2?

No. Only SMEs & Startups may apply for financial support within the AID4SME Open Call #2. The AID4SME is mandated to only provide financial support to this type of organisation.

9. Can entities from Switzerland or the UK apply for the AID4SME Open Call #2?

No. Only Horizon Europe associated countries are eligible (*those that have signed an agreement producing legal effects with the EU as identified in the Horizon Europe Programme Guide*) according to the updated list published by the EC.

For the AID4SME project, the reference version is [v3.1 \(11-07-2024\)](#). At the time of signing the AID4SME GA (November 2024), the United Kingdom and Switzerland had not yet signed an association agreement producing legal effects.

10. Is it possible to submit more than one proposal to the AID4SME Open Call #2?

No. The AID4SME Open Call #2 accepts a maximum of 1 application per eligible entity. The limit applies whether the entity applies alone or in a consortium. However, research institutions, research infrastructures, non-profit organisations and charitable (scientific) foundations and public research centres may integrate more than 1 proposal.

In case an entity submits more than 1 application, only the application submitted last will be eligible. This also applies to entities that have submitted more than 1 application, however, addressing different challenges.

11. Which type of challenges have been launched within the AID4SME Open Call #2?

The AID4SME Open Call #2 invites potential applicants to submit proposals that addresses 1 of the 10 challenges within the following 4 domains:

- Domain 1: Combined AI and Data solutions for Data Collection
- Domain 2: Combined AI and Data solutions for creation of Insights
- Domain 3: Combined AI and Data solutions for Decision Support
- Domain 4: Combined AI and Data solutions for Automation

The full list of challenges is:

- C1.1 Augmented sensing solution
- C2.1 Product-production Digital Twins
- C2.2 Automated monitoring hygiene inspection for refurbishment
- C2.3 Energy system Digital Twin decision support tool

- C3.2 Automated machine selection for parts production
- C3.3 Battery production digitalwork instructions & skill capturing
- C3.4 Automated warehouse and internal logistics management
- C4.1 Smart energy management of unplanned machine downtime
- C4.3 Semi-automated EV battery disassembly for recycling
- C4.4 Co-bot refrigerator door assembly solutions

12. My innovative solution addresses multiple challenges within the AID4SME Open Call #2. May I apply to more than one challenge?

Each application must address only one of the AID4SME Open Call #2 challenges. Please note that multiple applications are not allowed, unless in specific circumstances as defined, in accordance with article 4.1.4. Multiple submissions of the Guidelines for Applicants.

13. Which costs can be considered in an application to the AID4SME Open Call #2?

The type of costs that may be reported include personnel costs, purchase costs (travel and subsistence, equipment - depreciation cost only -, and other direct costs), and indirect costs (25% of personnel and purchase costs).

14. Is it subcontracting allowed within the AID4SME Open Call #2?

No, subcontracting is not allowed.

15. What is the estimated duration of the AID4SME Programme #2?

The AID4SME Programme #2 will have a duration of 14 months, starting on 01 November 2026*. During this period, the selected project must complete four sprints:

- **Stage 1 - Plan in M1:** beneficiaries will discuss and fine-tune the project's action plan for next stages with mentors and playground owners according to the selected challenge.
- **Stage 2 - Development from M2 to M8:** beneficiaries will develop the innovative solutions and proceed with integrations at playground owners' sites.
- **Stage 3 - Testing & Validation from M9 to M10:** beneficiaries will test, validate and demonstrate the solution.
- **Stage 4 - Solution Assessment & Business Plan from M11 to M14:** beneficiaries will assess and develop a business plan and an exploitation roadmap.

* indicative

16. What other benefits are provided to selected entities of the AID4SME Open Call #2?

Each selected project will have at their disposal the following services, infra-structures and mentors from the AID4SME consortium:

- Technical support with expertise in the technologies, engineering integration, testing and validation, and by access to public reusable results

- Technical support with access to the independent testing and validation facilities, so-called low-TRL playgrounds, of the project's scientific partners with specialisations in AI & data technologies for 1) data collection, 2) creation of insights, 3) decision support, and 4) automation.
- Technical and business support from large industry partners that will provide real-life use-cases and will open up their experimental facilities and/or production facilities, so-called high-TRL playgrounds, for testing and validation of the solutions. The industry partners cover the automotive, whitegoods, battery and energy sector.
- An open platform that is flexible to bring in challenges from industries outside the consortium.
- Business support and mentoring to develop business plans and a roadmap to exploitation of the SME solutions.
- Business support with providing the SMEs and Start-ups and their solutions access to the project's connected industry network and DIH networks to increase their market reach, maximise their business opportunities and grow to successful enterprises.

17. Are there any mandatory deliverables as part of the AID4SME Programme #2?

Yes, each selected project must include in the final list of deliverables of their proposal description the following three reports:

- Intellectual Property Agreement established with playground owners at M4.
- Test & Validation Report at M10
- Business plan and exploitation roadmap at M14.

18. How the evaluation and selection process of the AID4SME Open Call #2 will be conducted?

The AID4SME Open Call #2 remote evaluation and selection processes will be composed of the following phases:

- Eligibility check to all submitted proposals within deadline to verify that eligibility criteria are met
- In/out challenge scope check to assess if eligible proposals are aligned with the scope of the selected challenge
- External expert evaluation based on the AID4SME Open Call #2 evaluation criteria. Each eligible and within the scope proposal will be evaluated by two external evaluators to the AID4SME consortium
- Online interview to the top 3 proposals per challenge based on the overall score from the expert evaluation

19. What are the evaluation criteria applied at the expert evaluation phase of the AID4SME Open Call #2?

Each eligible and within the scope application will be evaluated by two external evaluators based on the following criteria:

- Criterion 1 - Novelty & Innovation (30% weighting)
- Criterion 2 - Impact (30% weighting)
- Criterion 3 - Implementation (20% weighting)
- Criterion 4 - Team (20% weighting)

20. Is the same evaluation criterion applied to both expert evaluation and online interview phases within the AID4SME Open Call #2?

No. Different aspects of the innovative proposal will be assessed in each phase of the remote evaluation & selection stage of the AID4SME Open Call #2. While the external expert evaluation will focus on Novelty & Innovation, Impact, Implementation and Team aspects of the proposal, the online interview aims to understand the project concept and alignment to selected challenges, team skills, competence and expertise, and willingness to exploit the results. The three criteria under consideration are the following:

- Criterion 1 - Project concept & Alignment (40% weighting)
- Criterion 2 - Team (30% weighting)
- Criterion 3 - Exploitation plan & IPR (30% weighting)

21. Which scoring system is applied for assessing the criteria in the AID4SME Open Call #2?

The AID4SME Open Call #2 will apply the following scoring system:

- 0: Fail. The application fails to address the criterion under examination or cannot be judged due to missing or incomplete information.
- 1: Very poor. The criterion is addressed in an unsatisfactory manner.
- 2: Poor. There are serious inherent weaknesses.
- 3: Good. While the application broadly addresses the criterion, there are significant weaknesses that would need correcting.
- 4: Very Good. The application addresses the criterion well, although certain improvements are possible.
- 5: Excellent. The application successfully addresses all relevant aspects of the criterion in question. Any shortcomings are minor.

22. Is the maximum financial contribution in the AID4SME Open Call #2 granted through a lump sum model?

Yes. The AID4SME Open Call #2 distributes the maximum contribution in a lump sum model. This means that lump sums are defined up-front and included in the Sub-grant Agreement (*Annex 3 of the AID4SME Open Call #2 Documentation Pack*). They will be paid upon completion of the activities in the sprints.

23. What is the payment schedule for the AID4SME Open Call #2?

The AID4SME Open Call #2 has the following payment scheduled:

- Period 1 at M1: Payment of 30% of the maximum contribution grant.
- Period 2 at M8: Payment of 40% of the maximum contribution grant.
- Period 3 at M14: Payment of 30% of the maximum contribution grant.

Note that 10% of the calculated amount within Period 1 is provided as compensation for the work performed during M1, whereas 90% represents a pre-financing payment. The pre-financing amount remains the property of the AID4SME consortium until the final payment.