

# **D7.3 Report on the evaluation and selection of additional test cases.**

## **Open Call**

19/12/2023

Authors:  
Virginia Sáenz (CIDETEC)  
Jagoba Iturri (CIDETEC)



## Technical References

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<b>Project Coordinator</b>	Ulla Forsström VTT Technical Research Centre of Finland Ltd
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CO = Confidential, only for members of the consortium (including the Commission Services)

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## Summary

The INN-PRESSME Open Call has enabled SMEs and other companies to access the operating Open Innovation Test Bed (OITB), composed of 16 Pilot Lines and related services, as well as other technical and non-technical services, for the upscaling of innovative and sustainable products made of materials of bio-based origin. In such a process, the INN-PRESSME eco-system provides the needed support to cover the whole value chain from feedstock conversion to end products.

From the beginning of INN-PRESSME project, nine different Tests Cases have been employed to validate the optimal functioning of the OITB, by jointly developing a range of novel bio-based demonstrators, with application in 3 different markets, to replace fossil-based analogues. By means of the Open Call the goal was originally to select 7 to 8 SMEs and large companies from at least 6 European countries through two open calls but later targeting even around 12-15 small new Innovation Concepts, (considering both first and second waves together), which should move from TRL 4-5 up to TRL 6-7. These new Test Cases (TC) will have 9 months for the development of the corresponding project to a successful end.

Hence, this deliverable D7.3 details the steps defined for the evaluation and selection of the additional test cases in both cut-offs. Such steps have helped selecting from the received 23 proposals 11 new projects (almost the 50%) to be implemented in close collaboration between INN-PRESSME pilot lines and services and the end users.

## Acronym Table

Acronym	Meaning
SME	Small & Medium-sized Enterprises
OITB	Open Innovation Test Bed
OC, OC1, OC2	Open Call, 1 <sup>st</sup> Open Call, 2 <sup>nd</sup> Open Call
FW, SW	First Wave, Second wave
TC	Test Case
TRL	Technology Readiness Level
PLs	Pilot Lines
IER	Individual Evaluation Report
CR / CM	Consensus Report / Consensus Meeting
ESR	Evaluation Summary Report
CoI	Conflict of Interest
NDA	Non-Disclosure Agreement
DSA	Demonstration Support Agreement

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# 1 Introduction

## 1.1 Scope of the Deliverable

This document provides a stepwise description of the processes followed for the selection of new additional test cases in the frame of INNPRESSME Open Calls (in both first and second wave). The here explained step-sequence covers from the earliest proposal pre-submission stage down to final negotiations held with the respective applicant companies, which lead to the final decisions involving either acceptance for funding or rejection.

### Relation with other deliverables

While D7.3 includes all the steps defined for the evaluation of the proposals received in the Open Calls and selection of the new test cases, other deliverables within WP7 have also described important steps from the process. Indeed, D7.1 presented the selection criteria to be considered by potential applicants to the Open Call (taken as starting point of this deliverable), while deliverable D7.2, covered the Promotion Activities being held for its dissemination.

## 1.2 Structure of the document

*Section 2* of this Deliverable introduces the most relevant steps followed in the new TCs selection process, while *Section 3* is focused on the results obtained in both Open Calls 1 and 2. *Section 4* is devoted to some concluding remarks and *Annexes* section, at the end of the report, is used to include all the supportive material (document templates, email drafts, etc) that might contribute to expose the transparency of the process.

## 1.3 Task input and output

The deliverable is one of the outputs of Task 7.2 – Selection of additional test cases of *WP7 – Open Call*, led by STAM with the main support of VTT and CIDETEC. The collaboration of the rest of INNPRESSME partners has been pivotal for its proper functioning. The work done is inevitably linked to the previous validation of the Open Innovation Test Bed (OITB) performed over 24 months for 9 demonstrators, which has enabled the opening of the INN-PRESSME ecosystem to additional innovation concepts. In this selection process, at the expiration of the call, the applications were collected and evaluated by the Open Call Board (formed by the institutions above) in collaboration with INN-PRESSME Pilot Line owners and service providers, and a selection of external experts, to finally arrange a rank of eligible projects that would lead to acceptance/rejection decisions upon prior agreement. A detailed analysis of the implementation performed in these projects will be provided in D7.4 *Analytical report on implementation and output of open calls* with deadline in Month 46 (October 2024).

## 2 General Information OPEN CALLS

### 2.1 Proposal selection procedure

Following the main objective of WP7, two Open Calls have been organized along the third year of INN-PRESSME project: the 1<sup>st</sup> Wave Open Call (held on M24-M25) and 2<sup>nd</sup> Wave Open Call (M29-M30). It must be noted that a shifting to earlier beginning dates was jointly agreed for the entire time-plan of WP7, aiming at positively influencing its overall development and closing, by setting a “safety” gap with the overall end of the project (see the modified Gantt-Chart in **Figure 1**). Thus, the planned starting of activities for Month 25 (T7.1) took place on M23 instead. Same applied to tasks T7.2 and T7.3 which moved from M28 to M25 and from M35 to M33, respectively.

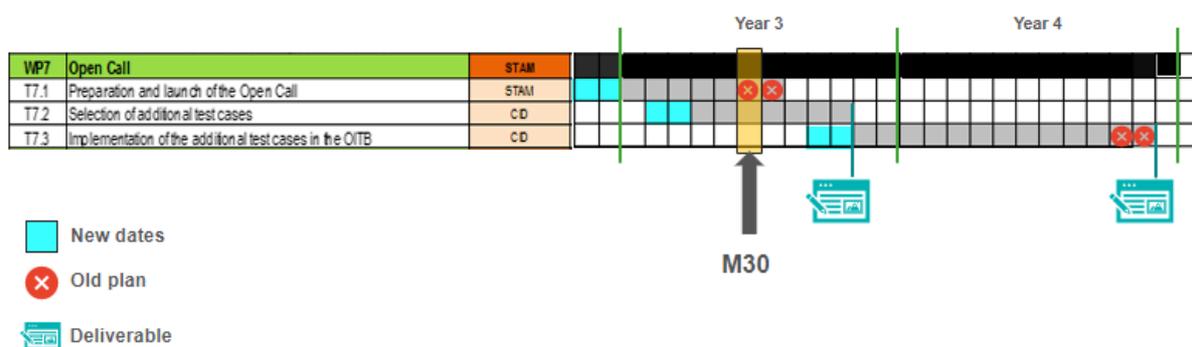


Figure 1. Adapted Gantt-Chart for WP7.

With this calendar change being applied, also the main deadlines of the process were directly affected and had to be finally re-arranged as follows:

Table 2-1. Final date arrangement for 1<sup>st</sup> and 2<sup>nd</sup> Wave calls.

	OC1	OC2
<b>Proposal submission</b>	01.12.2022 – 30.01.2023	02.05-15.06 2023
<b>Eligibility check</b>	15.02.2023	22.06.2023
<b>Evaluation period</b>	16.02-24.03 2023	30.06-11.08 2023
<b>Submission of letters</b>	31.03.2023	15.09.2023
<b>Contract Signature (upon joint agreement)</b>	30.06.2023	15.12.2023
<b>Start of experiments</b>	01.09.2023	02.01.2024
<b>End of experiments</b>	30.06.2024	30.09.2024

Prior to the respective call openings, an informative Webinar was held (November 16<sup>th</sup>, 2022, and April 27<sup>th</sup>, 2023) to provide potential applicants with general information about the process, including most relevant deadlines. These webinars (as shown in **Figure 2**) were hosted by representatives from Geonardo (as event organizers), with the relevant participation of VTT, STAM and CIDETEC, as main contributing partners (in the role of speakers) to the following topics:

- General presentation of the project and pilot lines (VTT, Ulla Forsström)

- b) General aim of the Open Calls (STAM, Riccardo Capolla)
- c) Selection criteria (CIDETEC, Jaime Ochoa -1<sup>st</sup> webinar- and Elena Jubete -2<sup>nd</sup> webinar-)

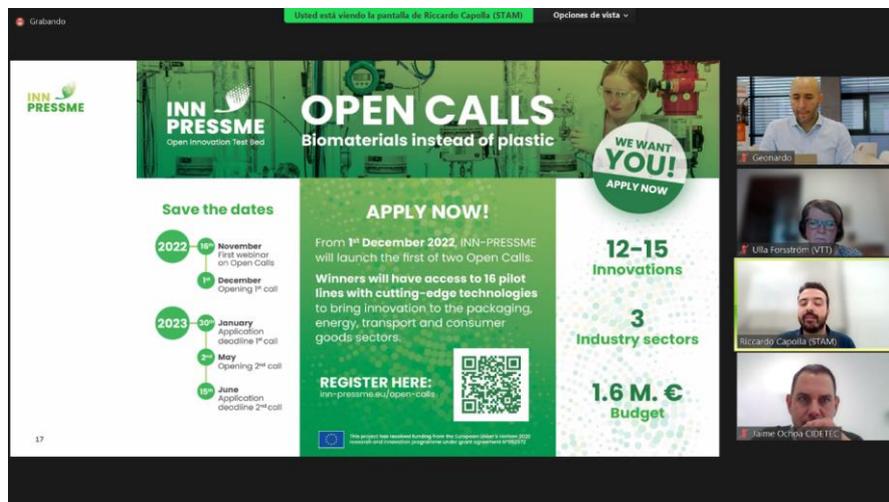


Figure 2. Screenshot from the Open Call webinar on November 16<sup>th</sup>, 2023.

These events figuratively gave green flag to the beginning of each process. Both waves have consisted of two distinguishable parts, namely, the proposal application and the ulterior selection process. While the former basically involved SMEs and large companies (with some guidance from INNPRESSME partners not involved in the evaluation process and if requested), the latter did require a dedicated contribution from diverse participants - both internal and external - and the so-called Open Call Board: CIDETEC (as task leader), STAM (as WP7 leader) and VTT (as project coordinator). Although the deliverable D7.3 will mostly focus on the second part of the process, the initial part might be also mentioned in the text either to provide a context or to help defining reference dates for the different steps followed.

The timeline of each call appears schematically represented in **Figure 3**. It shows how the selection process started immediately at the closing date for Innovation Concepts submission and lasted for 8 and 12 weeks for the 1<sup>st</sup> and 2<sup>nd</sup> wave, respectively. The longer duration of the selection process during the second wave is explained by the lack of activity at most of the institutions involved over the summer break (July/August 2023).

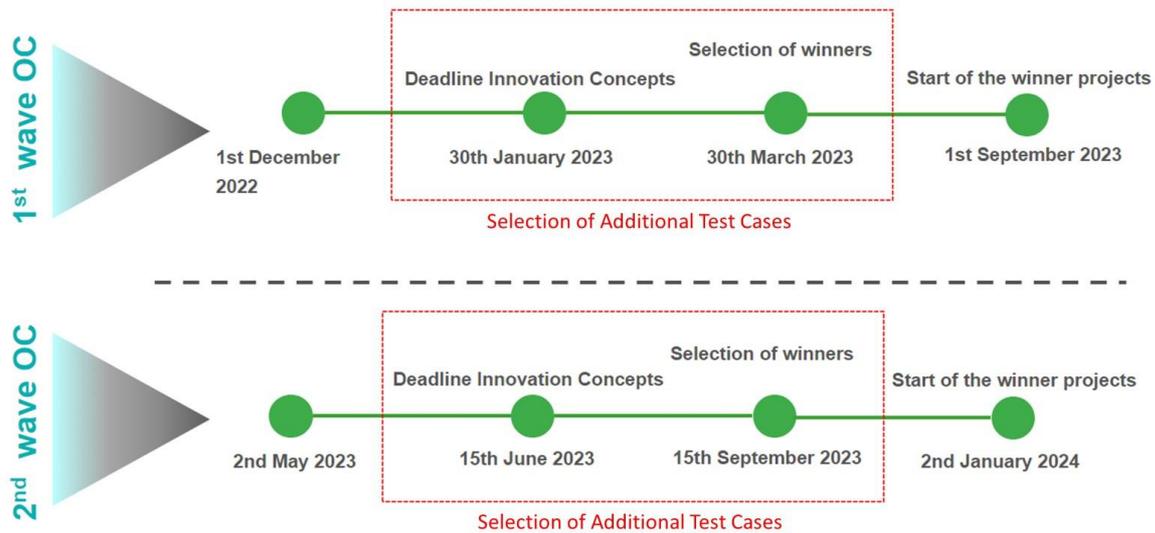


Figure 3. Schematic timeline of both OC1 and OC2. The dashed box corresponds to the period between the closing of the call and the announcement of winning proposals.

Overall, and as a consequence of the successful promotion activities detailed in deliverable D7.2, a total of 23 proposals were received between the two Waves, which have resulted in the selection of 11 new Innovations Concepts. These have been subsidized at the end of the respective processes for accessing INN-PRESSME’s facilities and services to perform scaling-up tests. Despite the apparent linearity of the scheme above (**Figure 3**), the selection of additional Test Cases has followed a much more intricate path, with several steps being needed from the closing of the call until official winner announcement took place. A more accurate description of the process is shown in **Figure 4**, with the key elements of the procedure being included in the dashed area of the diagram. These helped defining a proposal ranking in each call, which subsequently allowed announcing the top-ranked “winner” proposal and opening the negotiation phase of the respective projects. Although the latter would, in principle, seem to fall out of the core procedure, it has become critical in the final decision made, due to either technical- or contractual-based disagreements leading to final dropping of proposals.

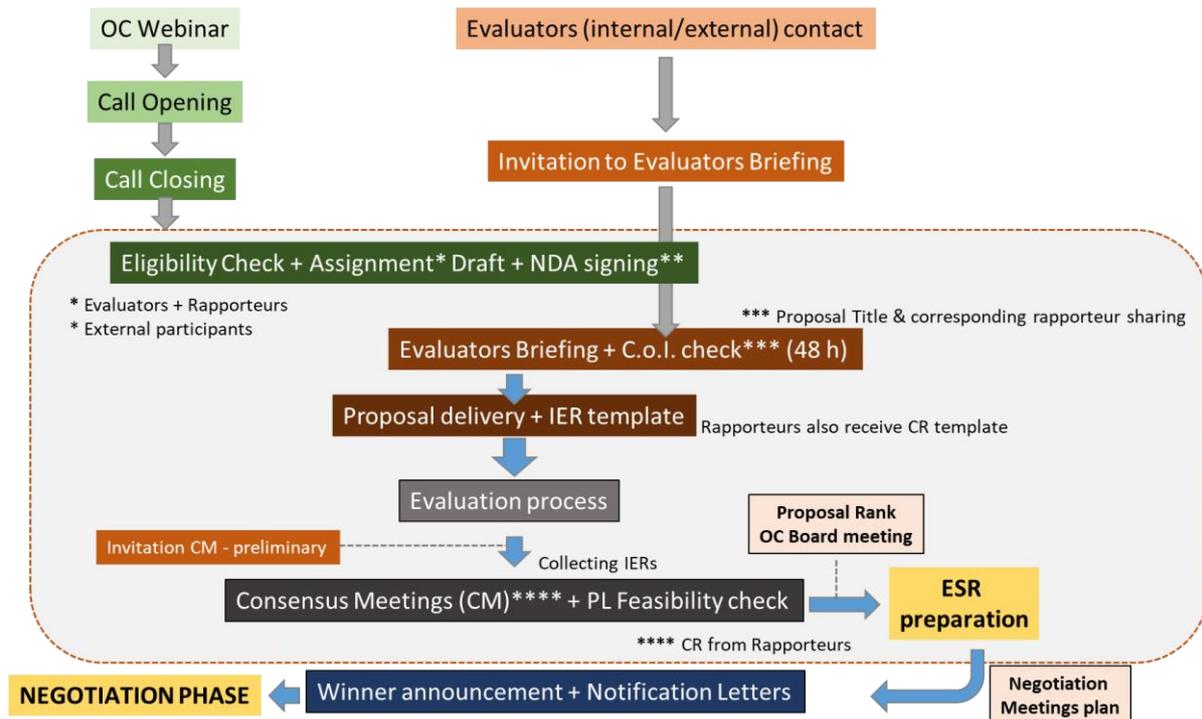


Figure 4. Cascade scheme of the different steps building the selection process. The dashed area covers the period indicated in Figure 3 above.

Each of the selection-related elements will be detailed along section 2.1 (Proposal selection procedure) in the following subsection distribution:

- 2.1.1 Eligibility Check
- 2.1.2 Evaluation
- 2.1.3 Consensus Meetings & Feasibility Check
- 2.1.4 Proposal Rank and ESR preparation
- 2.1.5 Winner announcement and notification letter
- 2.1.6 Negotiation Phase

## 2.1.1 STEP 1: Eligibility Check

The Eligibility Check consisted of two parts, taking place at different stages:

### A) Pre-proposal submission

Prior to the proposal submission, several aspects detailed in the “Guide for Applicants”, available on the project website, had to be considered (also included in D7.1). A summary of the aspects fulfill is:

- The Open call was mainly oriented to SMEs, start-ups, Mid-caps, and larger industrial companies.
- Beneficiaries could apply either as individual partners or as a consortium of maximum 2 industrial partners.
- Beneficiaries were encouraged to check the INN-PRESSME pilot-lines and technologies portfolio on the project website.

- Proposals had to be focused on small scale collaborative projects for development, testing, demonstration and/or verification of a new bio-based material, technology of product, with enhanced properties.
- The proposals should aim at reaching Technology Readiness Level (TRL) 6-7, starting from TRL 4-5.

In this initial step, which acted as the first filter to enter the selection process, candidates were given the opportunity to contact the OC Board to get their doubts solved and confirm their potential eligibility, attending to the general rules. As the applicants were confirmed as potential beneficiaries, they registered to participate in the Open Call through the dedicated platform (<https://www.inn-pressme.eu/open-calls-innovations/>). After registration, participants could download, complete, and submit the Application Form.

#### B) Post-submission

At the closing of the Open Calls, the eligibility of all applications submitted was checked for a second time during the initial 72 h by means of a thorough analysis by the OC Board, focused on 3 types of factors:

- (1) the type of **company** (country, size, number of employees...) and economic conditions (economic situation according to D&B Hoovers and annual turnover).
- (2) assessment of the **innovation** of the proposal (target market, compound, techniques, INN-PRESSME PLs involved). In terms of the services requested, it had to be confirmed that the implementation plan would involve at least two INN-PRESSME partners, since otherwise it would have been considered a direct contract, which would have fallen out of the scope of the Call.
- (3) The **budget** proposed for both the applicant and INN-PRESSME, for the development of the proposal. In this last case, proposals had to meet a specific cost coverage (all in in-kind contribution) distribution in which the 70% corresponded to the Consortium as provided services (person months to use the facilities of OITB members) with a maximum budget of 100 k€, while the remaining 30% had to be covered by the company.

As indicated in the scheme depicted in **Figure 5**, those proposals making it through were directly sent to the next level of the process, the Evaluation step.



Figure 5. Eligibility check scheme involving three major categories.

## 2.1.2 STEP 2: Evaluation

Evaluation of the proposals turned a pivotal segment in the Selection process, since it allowed getting an objective overview on the different projects based on the opinion from experts in the field of bio-based materials (both technical and market perspectives). The feedback thus received led to crucial filtering between projects which could be either potentially funded (or at least sent to the subsequent stage of the process) or directly rejected.

### A) Evaluators recruitment and Briefing webinar

The first step in the evaluation process was the recruitment of the Evaluation Board, considering a total of 4-5 evaluators were required for each proposal being evaluated. An example of contact email is included in Annexes section (**Annex 1**). Selected evaluators had to be both internal (INN-PRESSME partners) and external, being one out of the internal evaluators appointed as a rapporteur in each proposal. Such a rapporteur has acted as the responsible person for collecting the Individual Evaluation Reports of the pre-assigned proposal (including their own evaluation) and preparing the draft of the Consensus Report used in the Consensus Meetings (as will be explained further below, in Section 2.1.3). In summary, selected evaluators were experts in the topics covered in this Call (bio-based, sustainable, materials), with experience in research and innovation or business, and with experience in proposal evaluation. From these, internal experts could be directly selected from the pool of INN-PRESSME partners who volunteered to contribute to this process. In turn, the selection of external evaluators, was performed both through collaboration with analog projects with active Open Calls being held (i.e. Flex Function 2 Sustain, FF2S), which agreed in going for an exchange of evaluators, and also from additional partner institutions with participation in diverse EU projects. During OC1, evaluators were confirmed to be members of the final pool by February 6<sup>th</sup> 2023; during OC2 confirmation took place by June 16<sup>th</sup>, 2023.

Before the evaluation of proposals could start, evaluators were invited to attend a virtual briefing event, in which the main aspects and considerations of the evaluation procedure were disclosed. This briefing was organized by CIDETEC (being leader of the task), on

February 20<sup>th</sup> for OC1 and June 22<sup>nd</sup> for OC2, and focused on the following topics: (1) overview, general information and timeline of the Open Calls; (2) Evaluation criteria, steps of the evaluation process and structure of the proposal; (3) Individual Evaluation Report (IER) Template; (5) Scoring,; and finally, (6) reference to possible conflicts of interest that may arise in the assignment of proposals to evaluators.

As a part of this webinar's content a listing of recommendations that needed to be taken into account was also provided to participants for the completion of their IERs, in order to impact the evaluation process in the most positive manner. These points were:

- Write meaningful comments and do not leave room for interpretation.
- Explain positive as well as negative aspects of the proposal.
- Keep the evaluation brief and focus on the main aspects.
- Use the additional comments / closing remarks box to justify the final score and highlight the main strengths and weaknesses.
- Maintain a high degree of confidentiality.
- Inform as soon as you become aware of a Conflict of Interest.
- To Avoid:
  - comments not related to the (sub)criterion in question;
  - comments that are too short or too long or use inappropriate language;
  - categorical statements that have not been properly verified;
  - scores that don't match the comments.

Furthermore, special relevance was given to the identification of Conflicts of Interest (Col), which would arise when impartial and objective exercise of the functions of the Evaluator are compromised for reasons involving family, emotional life, political or national affinity, economic interest or any other direct or indirect personal interest or any similar cases. The most evident Col factors were considered by the OC Board to prepare a preliminary assignment of proposals, which helped defining the final list of selected experts.

#### B) NDA signature, preliminary assignment and Col check

Immediately at the closing the briefing webinar, and before evaluation process would have begun, the list of selected evaluators was contacted by email to check whether the preliminarily assigned proposals could originate any Conflict of Interest from their side or not. With such a purpose, the information provided was the acronym of the proposal, the name of the applicant company, the involved INN-PRESSME partners and the assigned rapporteur in each case, and they were given a period (24-48 h) for confirming the lack of eventual Col involved.

Before sharing such information, external evaluators were requested to sign an NDA (see Annexes) while for Internal evaluators (INN-PRESSME partners) confidentiality claims of the INN-PRESSME consortium agreement applied and, therefore, they did not need to sign a separate document.

Upon receipt of the confirmation of acceptance of the proposal by the experts, the INN-PRESSME Open Call team proceeded to send the pdf files of the assigned proposals, together with the template of the Individual Evaluation Report (IER) required for the evaluation (see Annex 2). Additionally, those internal partners appointed as Rapporteurs on each proposal also received the Consensus Report template (see Annex 3) needed to fill in with the IERs gathered from other evaluators in the evaluation team (including their own), before the Consensus Meeting would be held.

The final evaluator selection would summarize as follows:



Figure 6. Nationality of Institutions involved in the evaluation of proposals.

Table 2-2. Evaluation Board summary.

	<b>OC1</b>		<b>OC2</b>
N° reviewers	12		20
Ratio Internal:External	1:1		3:1
Nationalities	8		
Proposals / evaluator	2-4		2-4
Total evaluations / proposal	5		4
Rapporteurs/team	1		1

### C) Evaluation process

(Evaluation period: OC1, February 24<sup>th</sup> to March 7<sup>th</sup>, 2023; OC2, 23<sup>rd</sup> June to August 11<sup>th</sup>, 2023.)

For the evaluation process, the experts evaluated the proposals based on the guidelines attached in the IER template. In summary, the template covered the three main sections (with the corresponding subsections) that applicant companies had to complete in their Applications Form: Excellence, Impact, and Quality and Efficiency of the Implementation. In the exhaustive evaluation, additional relevance had to be given to some fundamental aspects, such as:

- Innovativeness of the proposal
- IPR on technology
- Concept fitting with the OITB's assets (e.g., pilot lines) and services
- Starting TRL (best between 4-5) and TRL implementation of 1-2 levels
- Feasibility of the activity according to pilot lines' capacity
- 30% from the beneficiary as provided materials, additional characterizations...

The score for each of the sections above ranged between 0 and 5, according to the next criteria:

*Table 2-3. Descriptive scoring criteria.*

Value	Comment
0	Very Poor, proposal fails to address the criterion or cannot be assessed due to missing or incomplete information.
1	Poor, criterion is inadequately addressed or there are serious inherent weaknesses.
2	Fair, proposal broadly addresses the criterion, but there are significant weaknesses.
3	Good, proposal addresses the criterion well, but a number of shortcomings are present.
4	Very good, proposal addresses the criterion very well, but a small number of shortcomings are present.
5	Excellent, proposal successfully addressed all relevant aspects of the criterion. Any shortcomings are minor.

As main variation, from OC1 to OC2 the allowance to score with half points was approved, being the maximum overall score 15. The threshold scoring for Excellence, Impact and Implementation criteria was set in 3 points, while the overall scoring threshold was of 10 points. At the Consortium Meeting (explained below), where score averages are jointly agreed, proposals failing to achieve such threshold score either per individual criteria or as global value, were directly rejected.

### 2.1.3 STEP 3: Consensus Meetings + Feasibility check

Along the evaluation period, and until the preset deadlines, evaluators sent their IER to the corresponding Rapporteur, who was responsible for gathering and transferring the impressions from every IER into the Consensus Report (CR) draft, to be presented during the Consensus Meeting (CM). These consensus meetings were attended by the rapporteur, the evaluators (both internal and external) and members of the Open Call team, as supervisors of the process. The Consensus Report would emphasize the most critical points from the proposal and thus provide a starting point for joint discussion about the pros/cons of the proposal, until an agreement on the final score was reached. This decision would consequently have an impact on whether the proposal could be taken to next step (Feasibility check) or directly rejected, instead.

The updated versions of the CRs, including latest comments from evaluators and the final score, were then shared with the OC Board with deadlines on March 15<sup>th</sup> (OC1) and September 8<sup>th</sup> (OC2), 2023. The complete schedule of Consensus Meetings held for both Open calls is provided in Section 3 (**Table 3-2**). The summarized situation, after experts agreed decision, was the following for both Open Calls at the end of the CMs:

Table 2-4. Results summary (in numbers) after Consensus Meetings

Open Call	Proposals	
	Next stage	Rejected
1 <sup>st</sup> Open Call	6	1
2 <sup>nd</sup> Open Call	9	7

The pdf file of those projects with a score above the threshold and considered as potentially eligible for funding (6 from 7 in OC1, and 9 out of 16 in OC2) were subsequently sent to the pilot line owners and/or service providers whom proposals requested services from. These had to perform a feasibility check (see **Annex 4**) based on what applicants described in the proposal and, if technical difficulties were found, had to comment on eventual alternatives to adapt the technical process in a way that potential weaknesses could be mitigated. Attending to the level of difficulty transmitted, feasibility feedback evaluations were classified as traffic-light colors as: fully feasible (green), feasible with remarks (yellow), not feasible (red). It must be noted that, at this point, none of the proposals was withdrawn because of non-feasibility.

### 2.1.4 STEP 4: Proposal Rank and ESR

The feedback received from the PL owners upon their feasibility check, together with the comments in the Consensus Report of the corresponding proposal, were also considered for the arrangement of a tentative proposal rank within each OC wave. The final version was decided in the course of extraordinary Open Call Board meetings (on March 30<sup>th</sup> and September 8<sup>th</sup>, 2023, for OC1 and OC2, respectively), attending to the following concepts:

- The order of the rank followed the scoring value received after the Consensus Meeting.
- For proposals with equal scoring, priority was given to those with better feasibility feedback.
- During OC2, when similar equal scoring situation occurred, additional priority was given to proposals including Pilot Lines that had not been selected in OC1.
- Also, in OC2, the proposal rank split the projects in two categories: accepted and/or reserve list. The latter would be activated if any of the higher-ranked projects dropped during the subsequent negotiations.

Once the different categories were established, notification letters were prepared accordingly. These were used to inform applicants about the category they had been included in, as explained in section 2.1.5. (see **Annex 5**)

In parallel, both evaluators' comments and feasibility check analyses (when applied) were jointly employed for the preparation of the Evaluation Summary Report (ESR) of each proposal. (see ESR template in **Annex 6**). This ESR was attached to the notification letter, to provide companies with a detailed justification of the outcome. Furthermore, those candidates reaching negotiation phase could work on the most critical comments from the ESR document to build the discussion with PL owners and service providers. Tables 3-3, 3-4 and 3-5 show the rank established for proposals in both OC1 and OC2.

## 2.1.5 STEP 5: Winner proposals announcement

On April 30<sup>th</sup> (OC1) and September 15<sup>th</sup> (OC2) 2023, companies received by email the official announcement about their resulting final position (winner, reserve list or rejected), together with the corresponding ESR document. Winning (top-ranked) proposals were transferred to Step 6 of the selection process, the negotiation phase. Annexes section includes a copy of the letters shared (Annex 5).

Applicants in reserve list were invited to wait for updates that may result from eventual drops in the course of the first round of negotiations and, finally, rejected applicants could only be acknowledged for their participation.

## 2.1.6 STEP 6: Negotiation phase & Contract signing

The final step regarded the Negotiation between applicant companies and INN-PRESSME PL owners and service providers to define the respective contributions, workflow and budget. The respective negotiation opening rounds were held on May 4<sup>th</sup> (OC1) and October 17<sup>th</sup> (OC2), 2023. However, most of the projects required undergoing through several rounds before common agreement could be reached. The complete arrangement of the first round of Negotiation Meetings is shown in Table 3-6.

Before meetings were arranged, the OC board discussed the preliminary calendar, and an informative email was sent to all parts involved in each project to officially communicate the decision made (Annex 7). This email additionally included an invitation to complete a doodle poll, and, upon date / time agreement, a Technical Coordinator was assigned to each project from INN-PRESSME participants, to act as a spokesperson and to guide the technical discussion (Annex 8). For such a purpose, the technical coordinator received the corresponding ESR, to better understand the comments from the rest of the partners and to focus the discussion on the most critical ones.

In parallel, and together with the invitation to the meeting (Annex 9) the applicant company(-ies) received the Demonstration Support Agreement (DSA) template and was (were) enabled to analyze in detail the terms and conditions of the contract, with the help of their legal services. It must be highlighted that the draft of such document was initially prepared attending to Horizon Europe rules, and under legal supervision of several institutions from INN-PRESSME consortium (Annex 10). During OC2, the official agenda of the negotiation meeting included a devoted section to DSA validation, in which applicants could expose their comments and questions over the contract content. These originated doubts were then forwarded to the project coordinator and INN-PRESSME's legal advisory board. Agreement on this document by beneficiary companies became of great importance, since only upon validation the discussion with PLs over technical aspects could proceed. The relevance of this procedure was reflected in the fact that 4 proposals (1 from OC1 and 3 from OC2) finally dropped from the selection process because of the lack of agreement with several terms (mostly those referring to IPR).

For proposals with straightforward validation of the DSA, the focus was set on polishing the technical contribution from the respective parts, according to the budget available, and on establishing a proper workflow and Gantt-Chart. All these were subsequently included in the "Budget disclosure" document (see Annex 11), annexed to the DSA. Then, OC beneficiaries were asked to sign the Demonstration Support Agreement together with those INN-PRESSME partners involved in the implementation.

The selected proposals from both OC1 and OC2 is shown in table 3-7. The content of this list was shared with the OC Board and INN-PRESSME project coordination, with

Greenovate! Europe as dissemination partners (to officially announce the selected proposals) and with Incotec, for the preparation of Deliverable 10.6.

As previously shown in Table 2-1, Technical implementation start was officially scheduled for September 2023 and January 2024 for proposals selected in the frame of 1<sup>st</sup> and 2<sup>nd</sup> Wave, respectively.

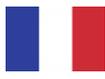
### 3 Results

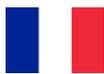
The following pages of this deliverable will schematically collect the overall results derived from each of the steps explained above for both 1<sup>st</sup> and 2<sup>nd</sup> Waves of the open Call.

#### STEP 1: Eligibility Check

Table 3-1 below shows the list of proposals received in the frame of both FW and SW that were validated to enter the evaluation process.

Table 3-1. List of proposals enabled to access the evaluation process.

Open Call	N° of eligible proposals	Country	Proposal ACRONYM	Company Size	Market
Open Call 1	7		SEABIO-FILM	SME	Food Packaging
			OPTIMA-PACK	SME	Food Packaging
			BIOMETHA	Midcap	Waste Management
			BioPrint	SME	Biomedical
			LUVBioWood	Midcap	Coatings
			CEC4BAA	SME	Consumer Goods
			PackPHA	SME	Food Packaging
Open Call 2	16		BioGuard	SME	Global NFC
			HARDPAK	SME	Cosmetics Packaging
			NOTPLA RIGID	SME	Plastic Cutlery and Packaging
			SEQUINS	SME	Fashion / Textile
			PULPEX	SME	Packaging (Bottles)
			SEAFLEX	SME	Packaging
			BIOTOY	RTO	Toy
			PIBER	SME	Insects Farms
			CEC4BAA	SME	Insoles / Footwear
			BEAT	SEM	Global Battery Energy Storage

			PHARAON	SME	Packaging / Bank Cards
			FIRAFLAX	SME	Panels
			ELASTHOME	SME	Insoles / Footwear
			NAMBAT	Large Enterprise	Batteries
			WOODFOAM	SME	Packaging
			CELLUCIRCLE	SME	Textile recycling

### STEP 2 & 3: Evaluation and Consensus Meetings

At the closing of the evaluation period and upon reception of all the IERs, the respective Consensus Meetings were organized. Attendance was limited to the evaluation team (including the Rapporteur) and a representative person from the OC Board, to supervise the discussion and impartiality of the decision made therein. Each proposal received an own slot to ensure confidentiality.

Table 3-2. Calendar of Consensus Meetings held in both OC1 and OC2.

1 <sup>st</sup> Open Call			2 <sup>nd</sup> Open Call					
Date	Time slot	Proposal name	Date	Time slot	Proposal name	Date	Time slot	Proposal name
09.03.2023	13:00 – 14:00	BIOPRINT	23.08.2023	10:00 – 11:00	PIBER	30.08.2023	10:00 – 11:00	PHARAON
	14:00 – 15:00	LUVBioWOOD		11:00 – 12:00	SEAFLEX		12:00 – 13:00	CELLUCIRCLE
	15:00 – 16:00	CEC4BAA		10:00 – 11:00	BIOTOY		10:00 – 11:00	CEC4BAA
	16:00 – 17:00	BIOMETHA	24.08.2023	11:00 – 12:00	FIRAFLAX	31.08.2023	11:00 – 12:00	NOTPLA RIGID
	11:00 – 12:00	PackPHA		12:00 – 13:00	HARDBAK		10:00 – 11:00	BEAT
13.03.2023	9:00 – 10:00	OPTIMA PACK	25.08.2023	10:00 – 11:00	NAMBAT	05.09.2023	11:00 – 12:00	WOODFOAM
14.03.2023	13:00 – 14:00	Serbio-Film		11:00 – 12:00	ELASTHOME		06.09.2023	10:00 – 11:00
				12:00 – 13:00	PULPEX	11:00 – 12:00		SEQUINS

During OC2, at the end of the corresponding CMs the following proposals failed in reaching a score above the requested threshold: **PIBER, BIOTOY, FIRAFLAX, PULPEX, NOTPLA RIGID, BEAT and SEQUINS**. These proposals were declared as “rejected” and withdrawn from the selection process. In turn, all proposals evaluated during OC1 reached the minimum and were directly transferred to feasibility check.

### STEPS 4 & 5: Proposal Rank (including Feasibility Check)

All proposals from OC1 reached the negotiation phase. In turn, only the top-ranked 7 proposals from OC2 could reach such negotiation level to match the overall budget (Table 3-4). The remaining two proposals, BioGuard and PHARAON, were initially classified as Reserve list (Table 3-5).

Plasco Pilot Line from VTT, covering blown extrusion facilities, has finally participated in several projects although it was not included in the official list of available INN-PRESSME PLs.

Table 3-3. Proposal rank from OC1.

1 <sup>st</sup> Open Call						
	Optima-Pack	LUVBioWood	BIOMETHA	SEABIO-FILM	BioPrint	Pack-PHA
<b>Country</b>	France	Turkey	France	Norway	Sweden	Netherlands
<b>Rank</b>	1 <sup>st</sup>	2 <sup>nd</sup>			5 <sup>th</sup>	6 <sup>th</sup>
<b>Average (score)</b>	11.5	11	11	11	10.5	10
<b>PLs involved</b>	PL2, PL10, PL VTT (Plasco), PL15	PL4, PL10	PL9, PL VTT (Blown extrusion)	PL8, PL9	PL8, PL9, PL14, PL16	PL10, PL11, PL15
<b>INN-PRESSME Services</b>	AIMPLAS	IRES	AIMPLAS	-	-	AIMPLAS
<b>Feasibility Check</b>						

Table 3-4. Proposal rank from OC2.

2 <sup>nd</sup> Open Call							
	SeaFlex	ELASTHOME	WOODFOAM	NAMBAT	CELLUCIRCLE	CEC4BAA	HARDPAK
<b>Country</b>	UK	France	Finland	Austria	Sweden	Cyprus	UK
<b>Rank</b>	1 <sup>st</sup>		3 <sup>rd</sup>	4 <sup>th</sup>		6 <sup>th</sup>	7 <sup>th</sup>
<b>Average (score)</b>	12.5	12.5	12	11.5	11.5	11	10.5
<b>PLs involved</b>	PL VTT (Plasco), PL9/PL15	PL1, PL2, PL4, PL8, PL11	PL3, PL14, PL VTT (Plasco)	PL12	PL1, PL2, PL8, PL9/PL15	PL9 / PL15, PL16 + PL 7	PL1, PL2, PL4, PL8, PL9 / PL15
<b>services</b>	AIMPLAS	AIMPLAS	KCL, AIMPLAS	INCOTEC	-	-	AIMPLAS
<b>Feasibility Check</b>							

Table 3-5. OC2 Reserve List.

2 <sup>nd</sup> Open Call		
	BioGuard	PHARAON
<b>Country</b>	UK	France
<b>Rank</b>	8 <sup>th</sup>	9 <sup>th</sup>
<b>Average (score)</b>	10	10
<b>PLs involved</b>	PL5, PL13	PL9/15, PL VTT (Blown extrusion)
<b>services</b>	-	IRES, AIMPLAS
<b>Feasibility Check</b>		

**STEP 6: Negotiation Phase of Winner proposals**

Top-ranked proposals accessed the negotiation phase, as indicated by the calendar below in Table 3-6. From this first panel, some of the projects required several extra rounds (even up to 5) to finish polishing details until final agreement was reached.

*Table 3-6. Negotiation Calendar (Round 1).*

1 <sup>st</sup> Open Call			2 <sup>nd</sup> Open Call		
Date	Time slot	Proposal name	Date	Time slot	Proposal name
04.05.2023	10:30 – 11:30	LUVBioWOOD	17.10.2023	10:00 – 11:00	NAMBAT
	12:00 – 13:00	BIOMETHA		11:00 – 12:00	CELLUCIRCLE
	11:00 – 12:00	SeaBiofilm		18.10.2023	09:00 – 10:00
13:00 – 14:00	PackPHA	10:00 – 11:00	ELASTHOME		
10.05.2023	10:00 – 11:00	BioPrint	19.10.2023	09:00 – 10:00	CEC4BAA
12.05.2023	12:00 – 13:00	OPTIMA PACK	24.10.2023	11:00 – 12:00	HARDPAK
			26.10.2023	10:00 – 11:00	SEAFLEX
			09.11.2023	11:00 – 12:00	BioGuard
			10.11.2023	13:00 – 14:00	PHARAON

Throughout these negotiations, BioPrint proposal dropped during OC1, same as happened for ELASTHOME, HARDPAK and SEAFLEX proposals in OC2. This led to the activation of both projects in Reserve list (BioGuard and PHARAON), which are indicated in the table by green coloured boxes.

### Final results: Selected projects

Those projects agreeing in both the DSA terms and the respective technical contributions, activated the collective signing of documents as well as the preparation of the budget disclosure annex. The list of Selected new Cases is shown in Table 3-7. The TC number assignment is merely indicative.

Table 3-7. List of Selected new Test Cases.

OCTC number	ACRONYM	Company(-ies)	INN-PRESSME Partners	TC leader
OC1-TC10	Optima-PACK	SeaBird (France)	IPC, AIMPLAS, FISC, VTT	IPC
OC1-TC11	LUVBioWOOD	Kayalar Kimya (Turkey)	FISC, IWN, IRES	FISC
OC1-TC12	BIOMETHA	Groupe Barbier (France)	IPC, VTT, AIMPLAS	IPC
OC1-TC13	SeaBiofilm	B'zeos (Norway)	CEA, IPC	CEA
OC1-TC14	PackPHA	Helian Polymers (Netherlands)	FICT, FISC, IPC, AIMPLAS	IPC
OC2-TC15	WOODFOAM	Woamy Oy (Finland)	VTT, Polymar, KCL, AIMPLAS	VTT
OC2-TC16	NAMBAT	Delfortgroup AG (Austria)	CIDETEC, INCOTEC	CIDETEC
OC2-TC17	CELLUCIRCLE	CelluCircle AB (Sweden)	RISE, VTT, CEA, IPC	RISE
OC2-TC18	CEC4BAA	ecorbio Ltd./CyRIC Ltd. (Cyprus)	CEA, VTT, IPC, AITIIP	CEA
OC2-TC19	BioGuard	Cambridge Graphene Ltd. (UK)	CEA, CIDETEC	CEA
OC2-TC20	PHARAON	NaturePlast SAS (France)	VTT, IPC, IRES, AIMPLAS	IPC

## 4 Conclusion

This Deliverable D7.3 has described the stepwise procedure followed along the Selection of additional Innovation Concepts that has been organized in the frame of INN-PRESSME Open Calls. The eleven (11) projects from nine countries across Europe were selected to test OITB pilots and other services and will have 9 months to take the implementation to a successful end. Fifteen from sixteen INN-PRESSME pilot lines and some additional laboratory facilities and pilot lines from OITB partners will be involved in the implementation of the new projects. Other services from OITB partners are also involved in several projects. The project selection was the key event from WP7, under Task 7.2, and will be the feeding source for Task 7.3, Implementation of new Test Cases. This implementation will be reported in Deliverable D7.4., the last volume of this series of documents. These Open Call projects will be used as references to make the INN-PRESSME Ecosystem more widely known and as a validation mean for services and procedures of the OITB business.

## 5 Annexes

### Annex 1: Recruitment email for Internal Evaluators (Example OC1)

Dear INN-PRESSME colleagues,

As you probably know, December 1<sup>st</sup> will set the starting flag to the first wave of the INN-PRESSME project's Open Call. Consequently, we need to urgently establish a pool of potential evaluators among consortium partners that contribute to the process of proposal selection. We thought that your organization could provide an expert evaluator, given your experience and activity in European programmes. The time dedicated to this activity will be eligible within the project expenses and will be linked to the WP7 activities.

For a better coverage of the areas of expertise that might be involved in the submitted documents, we aim at having a rather broad range of participating profiles and points of view. Hence, we have considered building an evaluating committee composed of both internal and external evaluators, in a 3:2 ratio. The latter would ideally, but not exclusively, come from other partner OITBs like **FlexFunction2Sustain** (FF2S), whose evaluation of the 2<sup>nd</sup> Open Call will run in parallel with our first evaluation. Therefore, we kindly ask for 5-6 volunteers among INNPRESSME partners to evaluate proposals from both calls so, in exchange their expert evaluators could also agree in reviewing ours. We believe that such an exchange will have a positive impact on the overall networking between both OITBs in mid- and long-term activities. Some of the general terms shared by both INN-PRESSME and FF2S evaluations are the following:

- **Dates:** Call closing, end of January. Evaluation, along first half of February 2023.
- **Read** (and evaluate) proposals (up to five-pages, max.).
- **Score** the quality of the proposal(s) in sections "Excellence, Impact, Implementation" (1-5 points).
- **Write** a short ( $\leq \frac{1}{2}$  page) evaluation summary about the strengths and weaknesses of the proposal(s).

Looking much forward your positive feedback no later than the 2<sup>nd</sup> of December.

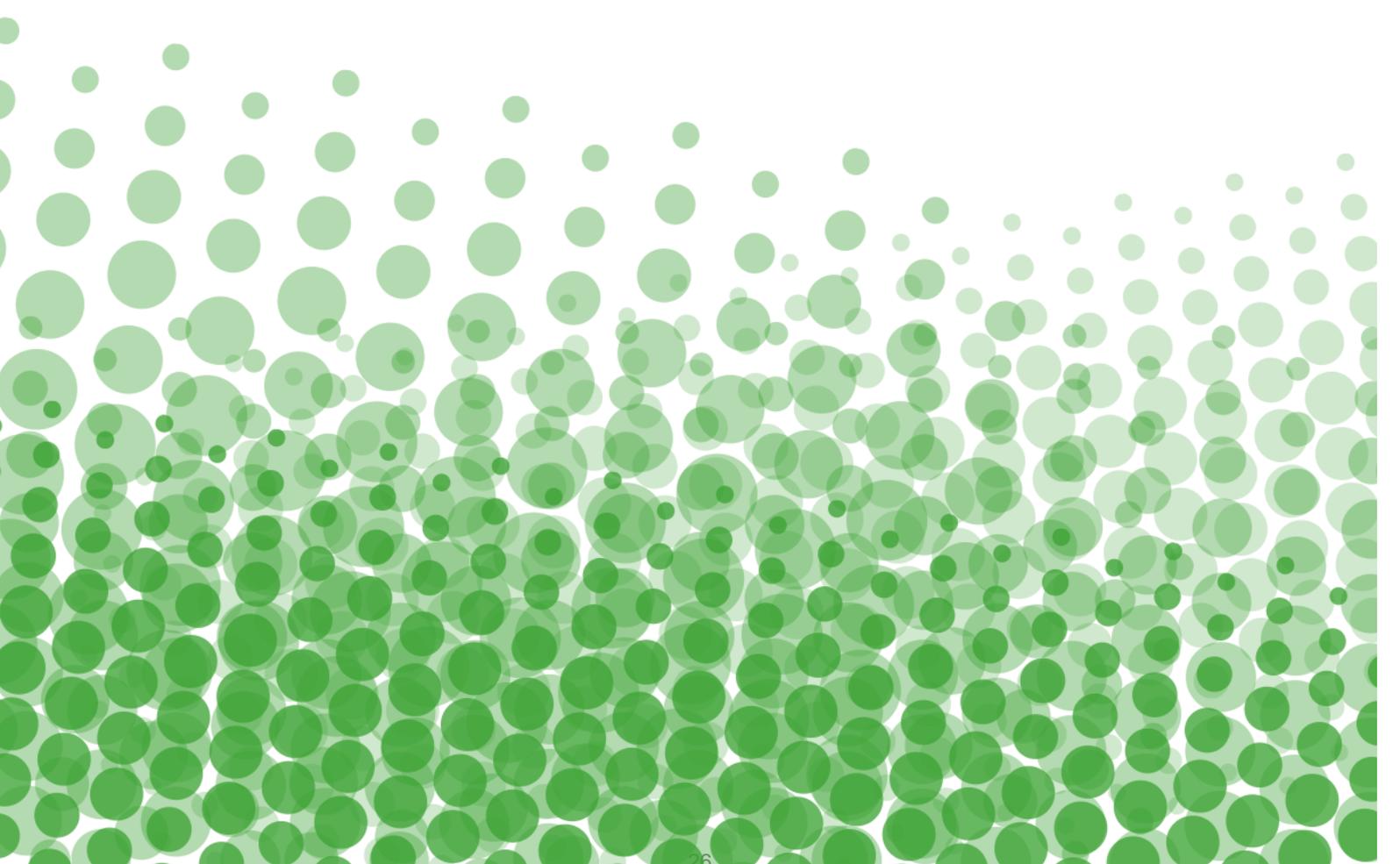
Kind regards,

## **Annex 2: Individual Evaluation Report**

# **INN-PRESSME**

# **Open Call**

**Individual Evaluation Report**  
**XX.XX.2023**



## Contact details (Evaluator)

**FIRST (GIVEN) NAME:** *Name*

**FAMILY NAME:** *Family Name*

**COMPANY:** *Company*

**PROPOSAL TITLE:** *Title*

**APPLICANT:** *Company*

## Preface: About Evaluation Scoring

Dear evaluator,

As stated in the *INN-PRESSME Open Call Guide for Applicants* document, proposal evaluation and ranking will follow a score-based assignment (see below) by which candidates will be given acceptance to funding or not. Scoring will have to, additionally, follow several threshold-setting rules to ensure roundness of the document and fulfilment of the requested quality criteria. Please, support the assignment of the selected score with a concise description of the specifications related to each of the sections (Excellence, Impact, and Implementation Quality and Efficiency).

Scoring value definition:

**0 - Very Poor**, proposal fails to address the criterion or cannot be assessed due to missing or incomplete information.

**1 - Poor**, criterion is inadequately addressed or there are serious inherent weaknesses.

**2 - Fair**, proposal broadly addresses the criterion, but there are significant weaknesses.

**3 - Good**, proposal addresses the criterion well, but several shortcomings are present.

**4 - Very good**, proposal addresses the criterion very well, but a small number of shortcomings are present.

**5 - Excellent**, proposal successfully addresses all relevant aspects of the criterion. Any shortcomings are minor.

Threshold agreements (Over a max. overall score of 15 points):

- **Individual** section threshold is **3**. (3/5)
- **Overall** threshold is **10**. (10/15)

Proposals failing to achieve these thresholds **will be rejected**.

Many thanks for your kind collaboration.

## Section 1: Excellence

Within this section, evaluators should value the following points:

- **Ambition:** problem to overcome and/or challenges to be addressed. Does the proposed project go beyond the state of the art?

[Insert **Comments** here] Max. 500 characters. Arial, 11.

- **Innovation:** value the description of the final part to be developed in collaboration with the INNPRESSME project (including a characterization of the functionality, size, etc). How will challenges above be solved? How will INNPRESSME services help to it?

[Insert **Comments** here] Max. 500 characters. Arial, 11.

- **Regulation, standardization, and certification issues:** Will the final prototype part/demonstrator be subjected to any policies and/or regulatory requirements? Is the need for standardization or certification related matters described?

[Insert **Comments** here] Max. 500 characters. Arial, 11.

- **Soundness** of the approach: is the soundness and credibility of the proposed methodology optimally demonstrated?

[Insert **Comments** here] Max. 500 characters. Arial, 11.

**Additional comments / Closing remarks:**

[Insert **Comments** here] Max. 1000 characters. Arial, 11.

**SECTION SCORE (0-5):** Select

## Section 2: Impact

Within this section, evaluators should value the following points:

- **Market opportunity and competition:** is it clearly shown what the applicant wants to do, the target market/s and the market potential of the new/improved product? Do applicant(s) provide a solid description of the competitive advantage of the proposed solution in comparison with those from competitors?

[Insert **Comments** here] Max. 500 characters. Arial, 11.

- **Commercial strategy and scaling up potential:** How will the applicant/s penetrate the target market(s)? (channels, resources and tools used for it and the time required). Are the expected exploitable results properly identified?

[Insert **Comments** here] Max. 500 characters. Arial, 11.

- Do applicant/s have background knowledge including **Intellectual Property Rights** related to this final demo part?

[Insert **Comments** here] Max. 500 characters. Arial, 11.

- **Return of Investment (RoI)** and the global economic value creation description.

[Insert **Comments** here] Max. 500 characters. Arial, 11.

- **Other expected impacts:** Societal, environmental, and economic impacts outside the company itself.

[Insert **Comments** here] Max. 500 characters. Arial, 11.

**Additional comments / Closing remarks:**

[Insert **Comments** here] Max. 1000 characters. Arial, 11.

**SECTION SCORE (0-5):** Select

## Section 3: Implementation Quality and Efficiency

Within this section, evaluators should value the following points, among others:

- **Work plan description:** Is there a description of the proposed work plan (key inputs, deliverables, tasks titles and time schedule, together with the role that the INN-PRESSME pilot lines will play in it)?

[Insert **Comments** here] Max. 500 characters. Arial, 11.

- **Team:** Are the management and leadership skills of the applicant(s) (plus the ability to bring new concepts and ideas into the market) properly demonstrated?

[Insert **Comments** here] Max. 500 characters. Arial, 11.

- **Budget estimation:** Is there an accurate description of the dedication to the project (person-month or number of hours and the related final cost) by the team described above? Do applicants describe which other internal resources will be allocated to the Innovation Concept project (e.g. expenses in consumables, travel costs)? If the proposal contains the participation of two companies, is the budget distribution between both and the resource allocation to fulfil the described tasks properly explained?

[Insert **Comments** here] Max. 500 characters. Arial, 11.

- **TRL level:** description of the TRL positioning of the proposed solution and the change from current state during the project (e.g. from a laboratory verified component – TRL4 – to demonstration in relevant industrial environment – TRL7).

[Insert **Comments** here] Max. 500 characters. Arial, 11.

- **Risk management:** description of most relevant techno-economic and management risks, together with a proposal of suitable mitigation strategies.

[Insert **Comments** here] Max. 500 characters. Arial, 11.

**Additional comments / Closing remarks:**

[Insert **Comments** here] Max. 1000 characters. Arial, 11.

**SECTION SCORE (0-5):** Select

## Evaluation

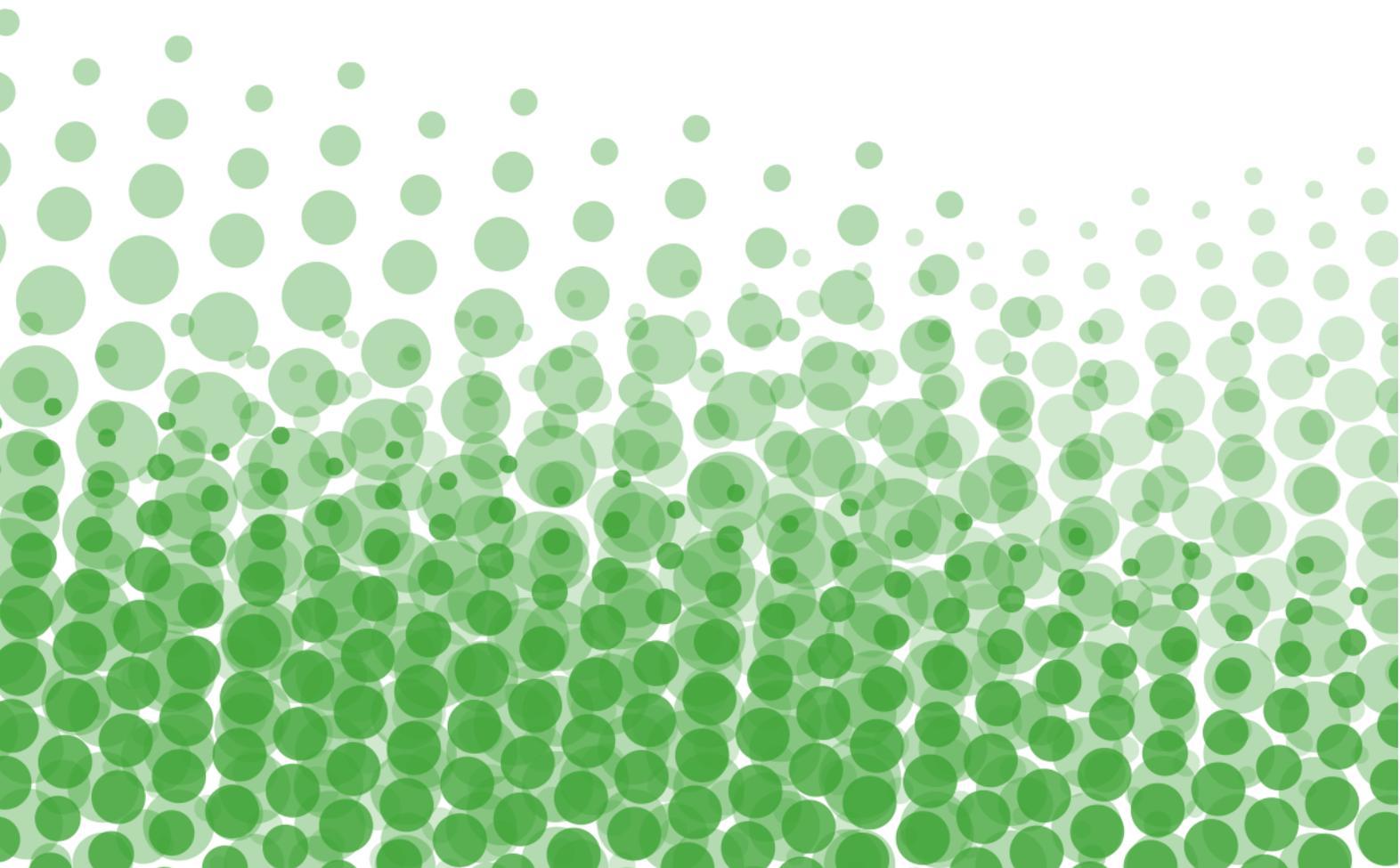
Section	Value	Comment
<b>EXCELLENCE</b> (min. 3/5)		Individual threshold Score achieved (Y/N):
<b>IMPACT</b> (min. 3/5)		Individual threshold Score achieved (Y/N):
<b>QUALITY and EFFICIENCY</b> (min. 3-5)		Individual threshold Score achieved (Y/N):
<b>OVERALL SCORE</b> (min. 10/15)		Overall threshold Score achieved (Y/N):

**Acceptance Decision:**

## **Annex 3: Consensus Report (CR)**

# **INN-PRESSME Open Call**

**Consensus Report (ESR)**  
**XX.XX.2023**



## Contact details (Rapporteur)

**FIRST (GIVEN) NAME:** *Name*  
**FAMILY NAME:** *Family Name*

**COMPANY:** *Company*

**PROPOSAL TITLE:** *Title*  
**APPLICANT:** *Company*

## Summary

	Eval 1	Eval 2	Eval 3	Eval 4	Eval 5	Consensus Meeting Score
Excellence						
Impact						
Quality and efficiency of the Implementation						
Proposal score						

## Section 1: Excellence

Collect the most relevant comments from the Individual Evaluation Reports (IERs) within this section.

### Comments:

[Insert **Comments** here]. Arial, 11.

## Excellence Section - Average Scoring

	Eval 1	Eval 2	Eval 3	Eval 4	Eval 5	Consensus Meeting Score
Excellence						

## Section 2: Impact

Collect the most relevant comments from the Individual Evaluation Reports (IERs) within this section.

### Comments:

[Insert **Comments** here]. Arial, 11.

### Impact Section - Average Scoring

	Eval 1	Eval 2	Eval 3	Eval 4	Eval 5	Consensus Meeting Score
Impact						

## Section 3: Implementation Quality and Efficiency

Collect the most relevant comments from the Individual Evaluation Reports (IERs) within this section.

### Comments:

[Insert **Comments** here]. Arial, 11.

### Quality & Efficiency Section - Average Scoring

	Eval 1	Eval 2	Eval 3	Eval 4	Eval 5	Consensus Meeting Score
Quality and efficiency of the implementation						

## Global Evaluation

Section	Value	Comment
<b>EXCELLENCE</b> (min. 3/5)		Individual threshold Score achieved (Y/N):
<b>IMPACT</b> (min. 3/5)		Individual threshold Score achieved (Y/N):
<b>QUALITY and EFFICIENCY</b> (min. 3-5)		Individual threshold Score achieved (Y/N):
<b>OVERALL SCORE</b> (min. 10/15)		Overall threshold Score achieved (Y/N):

**Acceptance Decision:**

## Annex 4: Feasibility Check request email (Example OC2)

Dear colleagues,

I get in contact you, on behalf of the Open Call team, regarding the proposal attached (PROPOSAL NAME), which has been presented in the frame of the 2<sup>nd</sup> cut-off of the call. After evaluation and subsequent agreement in the Consensus Meetings held, the project **has been considered as potentially eligible** for funding.

Before a final decision is made, we would need that, in your role as PL owners and/or service providers involved in the development of this project, a feasibility check is performed considering your own resources and the planned tasks. Subsequently, confirm us whether you are in line with it or not. In your description, please identify any potential issues foreseen and, in such case, comment on alternatives that might be applied to adapt the technical process and to make it feasible.

The deadline for receiving the feasibility check is set on **DATE** (although an early response would be much appreciated) and it should be sent via our general email address: [opencall@inn-pressme.eu](mailto:opencall@inn-pressme.eu).

Many thanks in advance,

## Annex 5: Notification letters

### a) Letter for winners

Name (Contact person)

Company

Address

COUNTRY

#### **Subject:**

**INN-PRESSME Open Call, evaluation results presentation**

**Proposal:** Title (ACRONYM)

Dear Madam/Sir,

We are writing in relation with your proposal for the above-mentioned call. Having completed the evaluation, we are pleased to inform that your proposal has passed this phase and that we would now like to start contract agreement preparation between your company and INN-PRESSME. The evaluation summary report (ESR) of your proposal will be shared in the next days. This ESR is based on the opinion of independent experts and Pilot Line owners that helped in the evaluation and feasibility analysis, respectively. The document will be used as a guide during the next stage.

Then, a meeting will take place remotely in **MONTH** to give you more details on this Contract preparation phase. You will shortly receive a dedicated invitation with an agenda, registration link and the list of participants.

We would like to remind you that INN-PRESSME Open Call team ([opencall@inn-pressme.eu](mailto:opencall@inn-pressme.eu)) remains at your disposal as main interlocutor for any query you may have on this process, and we invite to contact us for any issues you may have during that preparatory phase.

Yours faithfully,

b) Letter for proposals in Reserve List

Name (Contact person)

Company

Address

COUNTRY

**Subject:**

**INN-PRESSME Open Call, evaluation results presentation**

**Proposal:** Title (ACRONYM)

Dear Madam/Sir,

We are writing in relation with your proposal for the above-mentioned call.

Having completed the evaluation, we would like to inform that the score of your proposal is unfortunately not high enough to be selected. Although it received an evaluation score above the threshold, it is not among the top-ranked proposals.

Therefore, your proposal has been put on the reserve list (proposals that might be invited to contract agreement if higher ranked proposals drop out or additional resources become available). In such a case, we would contact you and invite you for contract preparation.

The evaluation summary report (ESR) of your proposal will be shared in the next days. Please consider the comments received in the enclosed Evaluation Summary Report (ESR) based on the opinion of independent experts and Pilot Line owners that helped in the evaluation and feasibility analysis, respectively. It might positively contribute to a fruitful negotiation in case your proposal is invited to contract agreement.

Yours faithfully,

c) Letter for Rejected proposals

Name (Contact person)

Company

Address

COUNTRY

**Subject:**

**INN-PRESSME Open Call, evaluation results presentation**

**Proposal:** Title (ACRONYM)

Dear Madam/Sir,

We are writing in relation with your proposal for the above-mentioned call.

Having completed the evaluation, we would like to inform that, unfortunately, your proposal has not reached the selection threshold and it is, therefore, rejected.

Thank you for your confidence in INN-PRESSME.

Yours faithfully,

## Annex 6: Evaluation Summary Report (ESR)

Information about Applicant and Proposal:	
Acronym/title of the idea:	
Proposer name:	
Type of company:	

### Evaluation Summary Report (ESR) – OPEN CALL N°

Evaluation result:
Total score: <u>X</u> (Threshold: 10)

Information about the evaluation process:
<p>The proposal was evaluated by an Evaluation Board composed of 5 independent expert evaluators, both internal (selected within INN-PRESSME partners*) and external, with experience in evaluation processes. Partners owning one of the Pilot lines involved in this proposal, and those confirming Conflicts of Interest, were excluded from the evaluation board.</p> <p>The next criteria have been evaluated:</p> <p>1) Excellence:</p> <ul style="list-style-type: none"> <li>- <b>Ambition:</b> problem to overcome and/or challenges to be addressed. Does the proposed project go beyond the state of the art?</li> <li>- <b>Innovation:</b> description of the final part to be developed in collaboration with the INNPRESSME project (including a characterization of the functionality, size, etc). How will challenges be solved? How will INNPRESSME services help to it? Do applicant/s have background knowledge including Intellectual Property Rights related to this final demo part?</li> <li>- <b>Regulation, standardization, and certification issues:</b> Will the final prototype part/ demonstrator be subjected to any policies and/or regulatory requirements? Is the need for standardization or certification related matters described?</li> <li>- <b>Soundness of the approach:</b> is the soundness and credibility of the proposed methodology optimally demonstrated?</li> </ul> <p>2) Impact:</p> <ul style="list-style-type: none"> <li>- <b>Market opportunity and competition:</b> is it clearly shown what the applicant wants to do, the target market/s and the market potential of the new/improved product? Do applicant(s) provide a solid description of the competitive advantage of the proposed solution in comparison with those from competitors?</li> <li>- <b>Commercial strategy and scaling up potential:</b> How will the applicant/s penetrate the target market(s)? (channels, resources and tools used for it and the time required). Are the expected exploitable results properly identified?</li> <li>- <b>Return of Investment (RoI)</b> and the global economic value creation description.</li> <li>- <b>Other expected impacts:</b> Societal, environmental, and economic impacts outside the company itself.</li> </ul>

3) Implementation Quality and Efficiency:

- **Work plan description:** Is there a description of the proposed work plan (key inputs, deliverables, tasks titles and time schedule, together with the role that the INN-PRESSME pilot lines will play in it)?
- **Team:** Are the management and leadership skills of the applicant(s) (plus the ability to bring new concepts and ideas into the market) properly demonstrated?
- **Budget estimation:** description of the dedication to the project (person-month or number of hours and the related final cost) by the team described above? Do applicants describe which other internal resources will be allocated to the Innovation Concept project (e.g. expenses in consumables, travel costs)? If the proposal contains the participation of two companies, is the budget distribution between both and the resource allocation to fulfil the described tasks properly explained?
- **TRL level:** description of the TRL positioning of the proposed solution and the change from current state during the project (e.g. from a laboratory verified component – TRL4 – to demonstration in relevant industrial environment – TRL7).
- **Risk management:** description of most relevant techno-economic and management risks, together with a proposal of suitable mitigation strategies.

Score ranges from 0 to 5 in each criterion. Interpretation of score:

**0 - Very Poor**, proposal fails to address the criterion or cannot be assessed due to missing or incomplete information.

**1 - Poor**, criterion is inadequately addressed or there are serious inherent weaknesses.

**2 - Fair**, proposal broadly addresses the criterion, but there are significant weaknesses.

**3 - Good**, proposal addresses the criterion well, but several shortcomings are present.

**4 - Very good**, proposal addresses the criterion very well, but a small number of shortcomings are present.

**5 - Excellent**, proposal successfully addresses all relevant aspects of the criterion. Any shortcomings are minor. The lowest and highest ratings given by evaluators were discarded to determine the final score per criteria.

Threshold agreements (Over a max. overall score of 15 points):

- **Individual** section threshold is **3**. (3/5)
- **Overall** threshold is **10**. (10/15)

Proposals failing to achieve these thresholds **will be rejected**. Those succeeding to stay above, are ranked in descending order according to the overall scores, and subsequently sent to the involved PL owners for a feasibility check.

**Criterion 1 - Excellence:**

Score: **X** (Threshold: 3/5)

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<b>Criterion 2 - Impact:</b>
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Score: <u>Y</u> (Threshold: 3/5)
----------------------------------

<b>Criterion 3 - Implementation Quality and Efficiency:</b>
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Score: <u>Z</u> (Threshold: 3/5)
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<b>Feasibility Check – PL owners:</b>
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<b>Total Score calculation:</b>
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Excellence: X
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Impact: Y
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Implementation: Z
-------------------

<b>TOTAL Score: XX</b>
------------------------

<b>PL owner comment: Feasible. / Feasible with adjustments / Not feasible</b>
---

<b>DECISION: Accept / Accept with comments / Reject</b>
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## Annex 7: Communication pre-negotiation (Example OC2)

Dear all,

Please, let us use this email as first contact between **NAME1** and **NAME2** INNPRESSME partners and **COMPANY NAME** applicant company, after proposal **PROPOSAL NAME** was selected as a potential candidate for implementation in the frame of our 2<sup>nd</sup> Open Call.

As you might already know, the next step in this process will involve a negotiation phase between all the contributing parts. These negotiations will be based on the feasibility comments from PL owners, which the company already received as part of the corresponding Evaluation Summary Report, and that will offer a starting point for discussion before a final agreement is reached.

The first round of meetings for all winner proposals is planned for **DAY1 & DAY2 of October**, in one hour-lasting slots **-between 9.00 and 13.00 h (CET)**. Therefore, before going for final schedule arrangement, we would kindly ask you to confirm your availability for the proposed dates. Upon reception of this feedback and validation, an invitation email will follow.

Many thanks in advance, and congratulations!

Kind regards

## Annex 8: Technical Coordinator contact (Example OC2)

Dear PL owner(s),

I would like to kindly inform you about the OC Board's decision to appoint you as chairperson(s) that should moderate the discussion between **PARTNER1**, **PARTNER2** and **PARTNER3** INNPRESSME partners and **COMPANY NAME** applicant company, during the negotiation meeting of **PROPOSAL NAME** proposal.

In order to perform this role appropriately, the **Evaluation Summary Report (ESR)** of the proposal is shared with you enclosed to this email. This ESR includes the comments from evaluators as well as all the feasibility checks from INNPRESSME PLs and services involved in the implementation, including yours. This document should offer a reference kick-off point for the negotiation. The agenda of the meeting will be shared as part of the invitation email that will be distributed in the incoming dates.

It must be said that being selected as chairperson does not necessarily mean that you will be finally appointed as TC leader, since this decision will rely on the final work distribution and the budget available.

Many thanks in advance for your support!

Kind regards

## Annex 9: Invitation to negotiation (Example OC2)

Dear all,

By this email we would like to invite you to the negotiation meeting that will be held on **DAY** at **TIME**, for **PROPOSAL NAME** proposal discussion between **COMPANY** applicant company and the owners of the Pilot Lines participating in the implementation. This meeting aims at defining the objectives of the project, as well as solving/polishing the most critical or limiting aspects of the proposal, so an agreement is reached between all the parts involved.

From INN-PRESSME side, attendant partners will be: **PARTNER1**, **PARTNER2** and **PARTNER3**, being **PARTNER1** the partner leading the negotiations.

**COMPANY NAME** will be represented by: **PARTICIPANT NAME**.

The **agenda** of the meeting (duration: 60 min) will be the following:

- Welcoming.
  - Company & Project presentation (Applicant, 10-15 min)
  - Demonstration Support Agreement, validation + questions (Applicant, 10 min)
  - ESR discussion (PLs, 20-25 min):
    - Feasibility issues
    - Alternative / mitigation measures
    - Work plan design + quantities
  - Closing summary (5min)
- 
- PL owners + Board ONLY for decision making (10 min)

In case of further comments or questions before the meeting, the Open Call team will remain at your disposal.

Regards,

## Annex 10: Demonstration Support Agreement (DSA) template



### DEMONSTRATION SUPPORT AGREEMENT for the company chosen through INN-PRESSME Open Calls

Version:	Date:	Beneficiary	Author
0.1	2023-05-xx-	VTT	Jutta Suksi, Ulla Forsström
0.2	2023-05-26	Fraunhofer, IRES, IPC, VTT	
1.0	2023-06-08	xxx	

#### BACKGROUND:

INN-PRESSME project is aiming to develop Open Innovation Test Bed (OITB) services along the entire value chain to help the integration of sustainable biomaterials into industrial processes. The project aims to set up a European OITB allowing companies to scale up nano-enabled biobased materials from lab scale (TRL4-5) to pre-industrial scale (TRL7) by improving processes and material characteristics (formulation, composition...). The OITB will also enhance industrial and market uptake of bio-based materials increasing their circularity and sustainability. The INN-PRESSME project, coordinated by VTT (Finland), gathers 27 partners, including 8 early-adopters, to implement a sustainable OITB to upscale biomaterials (both conversion of feedstocks and bio-resources and formulation of nano-enabled biomaterials) and processes from TRL 4-5 to 6-7.

INN-PRESSME OITB is an integrated ecosystem based on 16 pilot lines (PLs) offering a wide and flexible range of possibilities for feedstock conversion, materials development and upgrading as well as product processing/transformation suitable for final application in sectors such as packaging transport/automotive, and consumer goods. Complementarily, technical and market-oriented services will be available in order to secure the smooth transition of the new material concepts to the market. Technical services will cover the fields of eco-design and circular economy assessment (major emphasis in 2<sup>nd</sup> life use, recyclability and biodegradability studies), fast-accurate and reliable characterisation and nanosafety studies, among others; market-oriented services will provide support in innovation management, market replication and training, together with Support for funding (easing SMEs' access to funding) and Product certification advise (consortium counts on partners' experts in this field for packaging, automotive, and consumer goods).

This contract agreement establishes:  
the scope of the tasks as pilot line trials and other technical or nontechnical support to be provided to the Open Call winner;  
rights relating to the results of the tasks and  
the mutual non-disclosure agreement.

THIS CONTRACT AGREEMENT IS MADE ON **THE xxx OF , 2023**

BETWEEN:

(1) **[company details]**, hereinafter referred to as “Company”;

and

(2) the INN-PRESSME project participants involved in the implementation of this Demonstration Support Agreement:

**xxxx**

**yyyy**

**zzzz**

hereinafter individually referred to as “*INN-PRESSME demonstration support participant*” or collectively referred to as “*INN-PRESSME demonstration support participants*”

and (2) hereinafter, individually referred to as “*Party*” or collectively referred to as “*Parties*”.

AGREED TERMS

## 1. SCOPE, TASKS, RESULTS AND BACKGROUND

1.1.- The purpose of this Agreement is to define the scope of the demonstration and scaling-up tasks and support to be provided to the Company and the rules for the collaboration and dissemination.

1.2.- The INN-PRESSME demonstration support participants will co-operate as part of the INN-PRESSME project to validate the technical viability of the pilot lines to scale up novel biobased materials and the Company gives permission to use its name as a reference case of INN-PRESSME OITB

1.3.- Company will provide the information and materials necessary for the execution of the pilot scale trials.

1.4.-The Parties shall use reasonable efforts to carry out the tasks identified in Attachment 1. No payments or remuneration will be made to the Company for implementing its tasks under this Agreement. The costs of the INN-PRESSME demonstration support participants are covered by the INN-PRESSME project as identified in its Grant Agreement and Attachment 1.

1.5 Results means any (tangible or intangible) output of the tasks implemented hereunder such as data, knowledge, software, report or information — whatever its form or nature, whether it can be protected or not — that is generated in the tasks implemented, as well as any rights attached to it, including intellectual property rights.

1.6 Background means

regarding the INN-PRESSME demonstration support participants: any data, know-how or information – whatever its form or nature (tangible or intangible) is, including any rights such as intellectual property rights – that (a) is held by an INN-PRESSME demonstration support participant before the effective date of the this Agreement, and (b) is needed by another INN-PRESSME demonstration support participant to implement its own tasks under this Agreement or to exploit its own Results, whereas in case of planned exploitation, the use of the Background is subject to Fair and Reasonable conditions, but solely to the extent that such data, information, know-how and/or intellectual property rights are introduced as the basis of the tasks by the owning INN-PRESSME demonstration support participant.

Background means

regarding the COMPANY: any data, know-how or information – whatever its form or nature (tangible or intangible) is, including any rights such as intellectual property rights – that (a) is held by the COMPANY before the effective date of the this Agreement, and (b) is needed by another INN-PRESSME demonstration support participant to implement its own tasks under this Agreement or to exploit its own Results, but solely to the extent that such data, information, know-how and/or intellectual property rights are introduced as the basis of the tasks by the owning Company.

1.7 Results are owned by the INN-PRESSME demonstration support participant that generates them.

1.8 Where Results are generated from tasks carried out jointly by the INN-PRESSME demonstration support participants to this Agreement and it is not possible to separate such joint invention, design or work for the purpose of applying for, obtaining and/or maintaining the relevant patent protection or any other intellectual property right, the respective INN-PRESSME demonstration support participants shall have joint ownership of this work. The joint owners shall, within a six (6) month period as from the date of the generation of such Results, establish a written separate joint ownership agreement regarding the allocation of ownership and terms of exercising, protecting and exploiting such jointly owned Results and the division of related costs on a case-by-case basis. However, until the time a joint ownership agreement has been concluded and as long as such rights are in force, such Results shall be jointly owned in shares according to their share of contribution (such share to be determined by taking into account in particular, but not limited to, the contribution of a joint owner to an inventive step, the person months or costs spent on the respective work etc.) to the Results by the joint owners concerned. The joint owners shall agree on all protection measures and the division of related cost in advance. Unless otherwise agreed, each of the joint owners shall be entitled to use their jointly owned Results only for internal non-commercial research activities on a royalty-free basis. The joint owners shall be entitled use and exploit the jointly owned Results otherwise only subject to separate agreement and fair and reasonable compensation.

1.9 Background shall remain in the ownership of the Party or INN-PRESSME demonstration support participant that held such Background.

1.10 The Parties shall grant to each other a non-exclusive, royalty-free and non-transferable right to use the Results for implementing the tasks hereunder. In addition, INN-PRESSME demonstration support participant shall grant to each other a non-exclusive, royalty-free and non-transferable right to use the Background, if needed, for implementing the tasks hereunder. For the avoidance of doubt, any grant of access rights not covered by the above clause shall be at the absolute discretion of the owner and subject to such terms and conditions as may be agreed between the Parties concerned.

## 2. NON-DISCLOSURE OF INFORMATION AND DISSEMINATION

### 2.1.- Confidential Information:

As used in this Agreement, the term “*Confidential Information*” shall mean any confidential commercial, financial, technical or operational information, and information that has been or may be disclosed or otherwise made available in whole or in part to a Recipient in any form or medium. Such information may include technical data, manufacturing processes, know-how, design concepts, documents, plans, software and any other information possessed by the Parties relating to the purpose of this Agreement. Documents containing confidential information have to be marked as ‘confidential’ by the disclosing party, oral information has to be identified as confidential at the time of disclosure and has to be confirmed and designated in writing within 15 calendar days from oral disclosure at the latest as confidential information by the disclosing party

2.2.- The Parties may, subject to their discretion, disclose certain Confidential Information and agree to protect the Confidential Information disclosed to them. The Parties receiving Confidential Information are defined to be Recipients and the Parties disclosing Confidential Information are defined as Disclosing Parties. The Parties hereby undertake for the period identified in Section 4:

Not to use Confidential Information of which it is the Recipient, otherwise than for the purpose for which it was disclosed;

Not to disclose Confidential Information to any third party without the prior written consent of the Disclosing Party, excluding however disclosures to the European Commission in case requested by the European Commission;

To ensure that internal distribution of Confidential Information by a Recipient shall take place on a strict need-to-know basis; and

On demand, to return to the Disclosing Party all Confidential Information which has been supplied to the Recipients including all copies thereof and/or to delete all information stored in a machine-readable form. If needed for the recording of on-going obligations, the Recipients may however keep a copy for archival purposes only but have to ensure that the confidentiality obligations contained in this agreement are complied with for as long as the copy is retained.

2.3.-The Parties shall be responsible for the fulfillment of the above obligations on the part of their employees and shall ensure that their employees remain so obliged, as far as legally possible, during and after the end of the work and/or after the termination of employment or the relevant contract of engagement.

2.4.-The above shall not apply for disclosure or use of Confidential Information, if and in so far as the Party can show that:

The Confidential Information is or becomes publicly available by means other than a breach of the Party's confidentiality obligations;

The Disclosing Party subsequently informs the Recipient that the Confidential Information is no longer confidential;

The Confidential Information is or has been communicated to the Recipient without any obligation of confidence by a third party who to the Recipient's understanding is in lawful possession thereof and under no obligation of confidence to the Disclosing Party;

The Confidential Information, is already known by the Recipient without restrictions on its disclosure by the Disclosing Party or, at any time, was developed by the Recipient completely independently of any such disclosure by the Disclosing Party, whereas in the latter case, written proof has to be submitted by the Recipient; or  
The Confidential Information was required to be disclosed by law or by a court or administrative order.

2.5.-The Recipient shall apply the same degree of care with regard to the Confidential Information disclosed as with its own confidential and/or proprietary information, but in no case less than reasonable care.

2.6.-Each Party shall promptly advise the other Party in writing of any unauthorized disclosure, misappropriation or misuse by any person of Confidential Information as soon as practicable after it becomes aware of such unauthorized disclosure, misappropriation or misuse.

2.7.-If any Party becomes aware that it will be required, or is likely to be required, to disclose Confidential Information in order to comply with applicable laws or regulations or with a court or administrative order, it shall, to the extent it is lawfully able to do so, prior to any such disclosure notify the Disclosing Party in sufficient time to allow the Disclosing Party to seek an order for protective relief, and comply with the Disclosing Party's reasonable instructions to protect the confidentiality of the information.

2.8 For the avoidance of doubt, Results (including but not limited to all data and reports obtained during the execution of the work) shall be considered Confidential Information of the Party that generates such data and/or reports and is thus strictly confidential.

2.9. All Confidential Information is provided on an "as is" basis, without any warranty whatsoever, whether express, implied or otherwise, regarding its accuracy, completeness, performance, fitness for a particular purpose, non-infringement of third party rights, or otherwise, and the recipient agrees that the disclosing party shall have no liability whatsoever resulting from recipient's use of Confidential Information.

### 3. PROMOTION OF THE ACTION AND DISSEMINATION OF RESULTS

#### 3.1.- Communication activities by Parties

Parties must promote this demonstration action chosen through open call and its Results, by providing targeted general information without details to multiple audiences (including the media and the public) in a strategic and effective manner.

This does not change the confidentiality obligations in Article 2.

Any communication activity related to this demo call action (including in electronic form, via social media, etc.) and any infrastructure, equipment and major Results must include the following text: “*This project has received funding from the European Union’s Horizon 2020 research and innovation programme under grant agreement No 952972*”.

Any communication activity related to this demo call action must indicate that it reflects only the author's view and that the Agency and the European Commission are not responsible for any use that may be made of the information it contains.

### 3.2- Dissemination of Results

During the term of Demonstration support agreement, an INN-PRESSME demonstration support participant that intends to disseminate its Results generated under this Agreement must give advance notice to the other Parties of — unless agreed otherwise — at least 45 days, together with sufficient information on the Results it will disseminate.

Any other Party may object within — unless agreed otherwise — 21 days of receiving notification, if it can show that its legitimate interests in relation to such Results or Background would be significantly harmed. In such cases, the dissemination may not take place unless appropriate steps are taken to safeguard these legitimate interests.

## 4. ENTRY INTO FORCE / TERM

This Agreement will enter into force upon its signature and has a term of twelve (12) months. The obligations set forth under Section 2 and Section 3 will remain binding for five (5) years after the term of this Agreement.

## 5. MISCELLANEOUS

### 5.1 Liability

With the exception of the duty of Confidentiality, the liability between the Company and INN-PRESSME demonstration support participants for damages is limited to direct damage, but does not extend to indirect damage or consequential losses, such as interruptions in production or other operating losses, loss of revenue or profit, or other indirect losses, provided such damage was not caused by a wilful act or gross negligence. The total aggregated liability between the COMPANY and each INN-PRESSME demonstration support participant hereunder is limited to the amount of twenty thousand (20 000) euros, provided such damage was not caused by a wilful act or gross negligence. The terms of this Agreement shall not be construed to amend or limit any Company’s or INN-PRESSME demonstration support participants’ statutory liability.

The liability between INN-PRESSME demonstration support participants is covered by the terms of the Consortium Agreement and Grant Agreement of the INN-PRESSME project.

### 5.2 No Warranty

In addition to what is stated in Section 2.9, in respect of any information or materials (including Results and Background) supplied under this Agreement, no warranty or representation of any kind is made, given or implied as to the sufficiency, accuracy or fitness for purpose nor as to the absence of any infringement of any proprietary rights of third parties. Therefore, the recipient, shall in all cases be entirely and solely liable for the use to which it puts such information and materials (including Results and Background), and there is no liability in case of infringement of proprietary rights of a third party resulting from any access rights that may be granted hereunder.

### 5.3 Notices and other communications

Any formal notice in connection with this Agreement shall be signed by an authorised representative of the sending Party, or sent by mail with recorded delivery or telefax with receipt acknowledgement.

Other non-legal communications between the Parties may also be effected by other means such as e-mail with acknowledgement of receipt (e.g. minutes).

For information or documents to be transferred by electronic means, the following addresses shall be used:

[insert contact details]

For reporting in INN-PRESSME project required by the European Commission the xxx folder under Teams/Sharepoint folder Open Call Implementation will be used.

Any change of persons or contact details shall be notified immediately by the respective Party to the authorised representative of the other Party. The address list shall be accessible to all concerned. The change of the contact persons list does not require the signature of an amendment of the Agreement by all Parties hereto.

#### 5.4 Language

This Agreement is drawn up in English, which language shall govern all documents, notices, meetings, arbitral proceedings and processes relative thereto.

#### 5.5 Applicable law

This Agreement shall be construed in accordance with and governed by the laws of the Kingdom of Belgium excluding its conflict of law provisions.

#### 5.6 Settlement of disputes

All disputes arising out of or in connection with this Agreement, which cannot be solved amicably within 60 days of notification of the dispute to the other Party, shall be finally settled under the Rules of Arbitration of the International Chamber of Commerce by one or three (1 or 3) arbitrators appointed in accordance with said Rules. The place of arbitration shall be Brussels, Belgium. The award of the arbitration will be final and binding upon the Parties.

### 6. SIGNATURES

AS WITNESS:

The Parties have caused this Contract Agreement to be duly signed by the undersigned authorised representatives in separate signature pages the day and year first above written.

For and on behalf of [Party]

Signature of legal representative

Date:

For and on behalf of [Party]

Signature of legal representative

Date:

For and on behalf of [Party]

Signature of legal representative

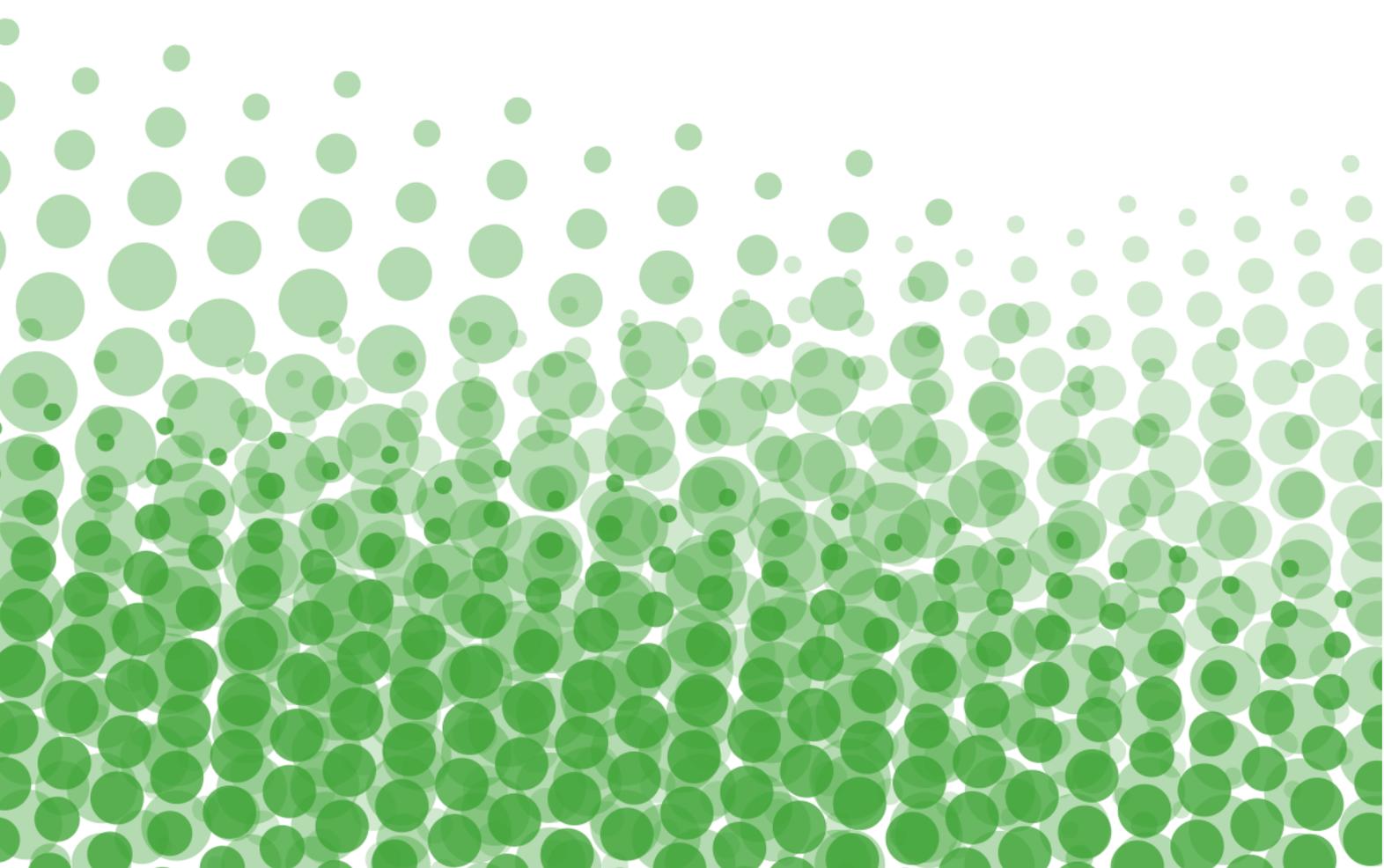
Date:

## **Annex 11: Budget Disclosure template**

# **INN-PRESSME**

## **Open Call 2**

**Annex - Budget disclosure**  
**XX.12.2023**



## Details

**Applicant Company:  
Representative:**

**PROPOSAL TITLE (+Acronym):**

**INN-PRESSME partners involved:**

**Technical Coordinator:**

## Summary Budget

PARTNER	PM	Other costs	Total

### Partner 1

- Comments on Tasks and materials needed/to be delivered.
- Estimated Budget: PM dedication + indirect costs. TOTAL: XX k€

### Partner 2

- Comments on Tasks and materials needed/to be delivered.
- Estimated Budget: PM dedication + indirect costs. TOTAL: XX k€

### Partner 3

- Comments on Tasks and materials needed/to be delivered.
- Estimated Budget: PM dedication + indirect costs. TOTAL: XX k€

### Partner 4

- Comments on Tasks and materials needed/to be delivered.
- Estimated Budget: PM dedication + indirect costs. TOTAL: XX k€

Below, add any **Work Plan Diagram / Gantt Chart**