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Document History

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¹ Integers correspond to submitted versions
EXECUTIVE SUMMARY

This deliverable presents the Call Announcement and the Guide for Applicants that have been created for Change2Twin and are part of WP4 “Financial support to third parties”.

The Call Announcement contains all the details regarding the Change2Twin Assessment voucher first open call, providing the necessary information to be published on the Horizon 2020 Funding and Tenders Portal.

The Guide for Applicants establishes the general terms and conditions to participate on the Change2Twin Assessment voucher first open call providing a detailed description of the evaluation criteria. The overall objective of the Guide for Applicants is to help applicants understand the selection process and at the same time, specify correctly what type of candidates Change2Twin is looking for. The Guide for Applicants is available on the website dedicated to for this open call in the FundingBox platform.
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CALL ANNOUNCEMENT

Announcement of an open call for recipients of financial support

Project **acronym**: Change2Twin  
Project **grant agreement number**: 951956  
Project **full name**: Create and Harvest Offerings to support Manufacturing SMEs to become Digital Twin Champions

The Change2Twin project is co-funded from the European Union’s Horizon 2020 Research and Innovation Programme under Grant Agreement No 951956.

The main purpose of Change2Twin is to provide assessment and guidance to European manufacturing companies to boost their digitization potential by adopting digital twin technology.

For this First Open call, we are looking for SMEs and mid-caps interested in addressing the development and implementation of technology and systems applicable to digital twins. Up to 25 manufacturing SMEs and midcaps will be selected to receive a detailed analysis of their situation and 3 different “recipes” from a certified Digital Innovation Hub who they choose to work with, containing the list of different technologies fitting the use case and details of an integrator willing to implement them. Both the report and the recipe are of value to the manufacturing company on their own – providing both the external, expert insights as well as a custom-tailored, ready to implement solution.

The ideal use case should use digital twin technology for one or several of the following purposes:

**Virtual Design**: Model-based system engineering, including analysis and design, ensuring that requirements are met and providing for seamless integration, test, verification and validation.

**Customer Engagement**: Interactive display of the system and its capabilities, for customers to understand how it meets their needs and how they will use it.

**Commissioning**: Checking the on-site implementation of a system against its design as captured in the digital twin to detect commissioning faults or anomalies.

**Feedback to Engineering**: Capturing usage characteristics with the digital twin to inform engineering of needs to change designs, or for future designs, or of operational risks.

**Monitoring**: Monitoring of a system's operation by the digital twin that is then able to, e.g., detect anomalies, performance degradation, etc.

**Optimization & Best Quality**: Process control with the digital twin to optimize a systems operation for best performance and efficiency.

**Scheduling**: Organization of workflows based on actual data and insights provided by the digital twin.

**Diagnosis**: Investigation of the cause or nature of a fault condition, situation, or problem in the physical system by reasoning on live data within the digital twin.

**Preventive Maintenance**: Maintenance and service of a physical system that lessens the likelihood of failures based on the observed and inferred system state as visible in the digital twin.

**Smart Logistics**: Logistic processes that adapt to live data of needs and options as visible in the digital twin.

**Smart Systems**: Systems that adapt to their dynamic environment, state, or tasks and potentially learn how to do that best. The digital twin is then a core part of the system's control.
The beneficiaries will receive up to **10 000 Euro as a lump sum** to cover the costs of the services provided by the certified Digital Innovation Hub of choice.

Applicants can submit a proposal through the following website: [https://change2twin-av-opencall.fundingbox.com](https://change2twin-av-opencall.fundingbox.com)

Submission starts: 28/01/2020 - 09:00 CET (Brussels time)
Deadline: 29/03/2020 - 17:00 CEST (Brussels time)
Maximum amount of financial support for each third party: Up to 10 000 Euro
Call identifier: C2T-AV1
Language in which the proposal should be submitted: English
A more complete overview of the call text and proposal guidelines can be found on the official web site: [https://www.change2twin.eu/](https://www.change2twin.eu/)
Email address for further information: opencalls@change2twin.eu
# GUIDE FOR APPLICANTS

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1 INTRODUCTION

Change2Twin is a European project financed by the European Commission looking for end-user SMEs and mid-caps from the manufacturing sector willing to develop and implement digital twin technology. If you are a manufacturing SME or mid-cap from the EU or associated countries, Change2Twin offers you a unique opportunity to digitize your business with a digital twin and thus become more competitive in the market. In cooperation with certified Digital Innovation Hubs (DIH), Change2Twin provides you with an individual assessment and a ready-to-use recipe for your digital twin deployment. Your individual solution may be composed of elements from several technology providers from all over Europe to best address your needs.

For this purpose, you can apply for an Assessment voucher worth up to 10 000 Euro in this open call. Afterwards, for the actual deployment of the digital twin and for the execution of application experiments, you will be able to apply for a Deployment voucher worth up to 90 000 Euro, available in two other open calls. You are free to choose if you will apply just for one of the two vouchers or both.

The Change2Twin Consortium is led by SINTEF AS and is composed of 18 partners from 9 European countries (Norway, Austria, Poland, Netherlands, Italy, Switzerland, France, Germany, and Spain).

2 WHAT DO WE OFFER?

Change2Twin will competitively award 2 380 000 Euro worth of grants.

In this call you will be able to apply for an Assessment voucher. We will select up to 25 applications who will receive up to 10 000 Euro as a lump sum to cover the costs of contracting a certified DIH of choice to perform a thorough analysis of their digitalization potential which identifies both the aspects which can deliver the highest impact and the technologies needed to digitize them. The final result, delivered to the manufacturing SME by the DIH, includes a report detailing improvements achievable with digital twin technologies together with a complete recipe for their deployment. Both the report and the recipe are added value to the manufacturing company – providing both the external expert insights as well as a custom-tailored, ready to implement solution. Moreover, you will be able to use them as a basis to apply for the second instrument of Change2Twin – the Deployment voucher, in which you may receive support to implement one of these solutions.

You will be required to name the DIH that you want to work with in the application form. If you do not have any previous contacts with DIHs please choose one that is geographically close to you from the list of certified DIHs available in the Change2Twin website. If selected, applicants will be asked to confirm the choice of DIH and will be able to modify this choice if for some reason that DIH is not able to provide the assessment. In this scenario, the Change2Twin consortium may help selected applicants find the DIH that best fits their needs. If the new DIH to be selected is from a different country than the original DIH, you will be allowed to modify your budget.

Applicants can submit a proposal through the following website: https://change2twin-av-opencall.fundingbox.com/. The call will open on the 28th of January 2021 at 09:00 CET and will close on the 29th of March 2021 at 17:00 CEST.
3 ELIGIBILITY CRITERIA

3.1 WHO ARE WE LOOKING FOR?

We are looking for manufacturing² SMEs³ and mid-caps⁴ located in the Member States of the European Union and its Overseas Countries and Territories (OCT), in Associated Countries to H2020, or in the UK.

Companies applying to this open call will ideally have already reached a digitisation level⁵ of 3, which means that they preferably already use dashboards and data from important business processes, such as production, are made available by the use of sensors. The minimum level of digitization for companies that apply to the open call is 2, in which digital systems in the organisation are largely connected to each other and exchange data to provide business application and software with relevant information. For more information on digitization levels please read the FAQs.

For UK applicants: EC and UK have entered into a Withdrawal Agreement as well as a Trade and Cooperation Agreement which allows UK entities to participate in the Change2Twin Project.

3.2 WHAT TYPES OF ACTIVITIES ARE WE FUNDING?

The Assessment voucher will be used to contract a certified DIH of your choice to conduct a thorough analysis of the digitalization potential of your business, and provide 3 ready-to-use recipes for implementation, containing the list of different technologies fitting the use case and details of an integrator willing to implement them.

Some of the activities covered by the Assessment voucher and that will be carried out by the selected DIH will be:

- Assessment of the business potential of the end user digital twin challenges.
- Selection of the most impactful challenges.
- Delivery of targeted implementation plans based on secure offerings of solution providers in both the local and EU marketplace.
- Analysis of the implication for running a more profitable business.
- Analysis of other funding opportunities.

Footnotes:
²Manufacturing companies refers to SMEs or mid-Caps registered, under national law, to perform business activities under a Code related with the manufacturing sectors.
³An SME will be considered as such if it complies with the European Commission’s Recommendation 2003/361/EC. As a summary, the criteria defining an SME are:
- Headcount in Annual Work Unit (AWU) less than 250;
- Annual turnover less or equal to €50 million or annual balance sheet total less or equal to €43 million.
Note that the figures of partners and linked enterprises should also be considered as stated in the SME user guide.
⁴‘Middle-capitalization company’ or ‘mid-cap’ means an enterprise that is not a SME and that has up to 3 000 employees, knowing that the staff headcount is calculated in accordance with Articles 3 to 6 of the Annex to Commission Recommendation 2003/361/EC.
⁵Change2Twin applies the Acatech Industrie 4.0 Maturity Index to assess the digitalization level of companies.
3.3 IDEAL USE CASE

Even though you will not be asked to provide a concrete plan for implementation at this stage, the final goal of your use case must be the development and implementation of technology and systems applicable to digital twins for manufacturing.

The digital twinning solutions can embrace different technologies and architectures. Some examples include:

- The solutions can start from a single component to a full manufacturing line based on the hierarchy of a whole system.
- They can also start from newly built products at the start of their lifecycle.
- The projects can be based on business strategy and potential position in the ecosystem of stakeholders and might include linking to digital twins that already exist or are in development.

The digital twinning technology should be used for one or more of the following purposes:

- **Virtual Design**: Model-based system engineering, including analysis and design, ensuring that requirements are met and providing for seamless integration, test, verification and validation.
- **Customer Engagement**: Interactive display of the system and its capabilities, for customers to understand how it meets their needs and how they will use it.
- **Commissioning**: Checking the on-site implementation of a system against its design as captured in the digital twin to detect commissioning faults or anomalies.
- **Feedback to Engineering**: Capturing usage characteristics with the digital twin to inform engineering of needs to change designs, or for future designs, or of operational risks.
- **Monitoring**: Monitoring of a system's operation by the digital twin that is then able to, e.g., detect anomalies, performance degradation, etc.
- **Optimization & Best Quality**: Process control with the digital twin to optimize a system's operation for best performance and efficiency.
- **Scheduling**: Organization of workflows based on actual data and insights provided by the digital twin.
- **Diagnosis**: Investigation of the cause or nature of a fault condition, situation, or problem in the physical system by reasoning on live data within the digital twin.
- **Preventive Maintenance**: Maintenance and service of a physical system that lessens the likelihood of failures based on the observed and inferred system state as visible in the digital twin.
- **Smart Logistics**: Logistic processes that adapt to live data of needs and options as visible in the digital twin.
- **Smart Systems**: Systems that adapt to their dynamic environment, state, or tasks and potentially learn how to do that best. The digital twin is then a core part of the system's control.

3.4 HOW TO APPLY?

When applying to Change2Twin open call, please consider the following conditions:
● We will only evaluate proposals submitted through the online form [https://change2twin-av-opencall.fundingbox.com](https://change2twin-av-opencall.fundingbox.com) before the **deadline** (29 March 2021, 17:00 CEST Brussels time). Upon receipt of each proposal, the system will send you a confirmation of your submission.

● The application form must include a simple budget. More information on how to complete the budget is provided in the FAQs.

● You have to verify the completeness of the form, as it won’t be possible to add any further information after the deadline. However, after submitting the application you will be able to modify the form until the deadline.

● **You can submit only one proposal** to this open call. If more than one proposal is identified, only the last proposal which has been submitted in order of time will be evaluated.

● Your proposal must be written in **English** in all mandatory parts in order to be eligible. Only parts written in English will be evaluated.

● All mandatory sections of your proposal must be completed. The data provided should be actual, true, complete and should allow assessment of the proposal. Additional material, not specifically requested in the online application form, will not be considered for the evaluation. We will check all the information provided in your application during the external evaluation phase and Sub-Grant Agreement (SGA) preparation phase.

● We will take into consideration the existence of potential **conflict of interest** among you and one or more consortium partners. Consortium partners, their affiliated entities, employees and permanent collaborators cannot take part in the Change2Twin programme. All cases of potential conflict of interest will be assessed case by case.

● Entities participating should have **not received more than 100 000 Euro via open calls** (FSTP) from H2020 I4MS and SAE projects. Each applicant will be asked to provide information confirming the previous funding.

● We don’t accept entities that are under liquidation or are an enterprise under difficulty according to the Commission Regulation No 651/2014, art. 2.18, or that are excluded from the possibility of obtaining EU funding under the provisions of both national and EU law, or by a decision of both national or EU authority.

### 4 HOW WILL WE EVALUATE YOUR PROPOSAL?

Our evaluation process is transparent, fair and equal to all our participants. We will evaluate your project through the following phases.

#### 4.1 ELIGIBILITY CHECK

The eligibility check will be done on all proposals submitted before the deadline. All criteria are listed in Section 3 in this Guide for Applicants. The projects that do not comply with those criteria will be excluded and marked as ineligible.
4.2 EXTERNAL EVALUATION

All projects will be evaluated by two external and independent evaluators with complementary profiles and backgrounds, appointed according to the specific characteristics of each project. Your project will be evaluated within the following awarding criteria:

(1). EXCELLENCE will evaluate:
Ambition. Applicants should explain why they are applying to this Open Call. Why do they want to implement a digital twin and how does it connect to their business and its KPIs. This information will be used to evaluate your project’s alignment with Change2Twin’s goals.

Innovation. The applicants should provide information about the current production process(es) that they want to improve. In addition, they will be asked to perform a self-assessment of their current level of digitization following the definitions provided in the FAQs. Other questions to address in this section are:
- Which systems or services need to become smart and why?
- Do you aim at autonomous behaviour or at supporting human operators or users?

(2). IMPACT:
Applicants should explain the potential impact of having an operational digital twin on their business. The questions to address in this section are:
Business impact:
- Which parts of your business will benefit most and why?
- How essential is the envisioned digital twin technology to (future) core processes or products?
- Do you aim at an improvement of existing products or services or at new market opportunities, e.g., with the introduction of smart systems?

Time-critical information use:
- Where are the envisioned advantages of near real-time insights provided by envisioned digital twins?
- Are your business processes and people prepared to act on live data or near real-time insights?
- How costly is any failure to act in time and who bears these costs?

(3). IMPLEMENTATION will consider:
Team and experience. Applicants should explain the adequateness of competences and skills to fulfil the assessment. In particular, they should refer to relevant past experiences in digitization projects and describe the skills and experience of the team that will work with the Digital Innovation Hub, including sufficient management and leadership qualities. The team should at least include one person responsible for production and one person from the business side.

SCORING
Each evaluator will rank the application assigning a score from 0 to 5 for each criterion. The evaluation will be done under the following criteria:
- 0 = 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 addresses all relevant aspects of the criterion. Any shortcomings are minor.

The threshold for individual criteria will be 3.
The overall threshold, applying to the sum of the three individual scores, will be 10.
If scores on a project show significant divergence between the two reviewers, a third reviewer will be involved to provide an additional independent assessment of this proposal.
Ties will be solved using the following criteria, in order:
1º. Impact score.
2º. Implementation score.
3º. Excellence score.
4º. Gender balance.
5º. Date of submission: earlier submitted proposals go first.

Once all the individual evaluations are done, the final score will be calculated as an average of the individual assessments provided by the evaluators.
All proposals obtaining a score above the threshold, will be passed to the next phase.

**EXTRA POINTS**
Companies that are operating in sectors where digital technologies are underexploited will be given 1 additional point in their overall score. For the purpose of this open call, these sectors are: construction; basic metals & fabricated metal products; textiles, wearing apparel, leather; and beverages and food.\(^6\)

**GENDER BALANCE**
Beneficiaries must take all reasonable measures to promote equal opportunities between men and women in the implementation of the action. They must aim, to the extent possible, for a gender balance at all levels of personnel assigned to the action, including at supervisory and managerial level.

### 4.3 CONSENSUS MEETING

The Application Experiment (AE) Management Board, formed by the 10 core partners of Change2Twin\(^7\) and two external experts will decide by consensus (\(\frac{2}{3}\) majority votes will be considered consensus too) the ‘List of finalists’. The discussion will be based on the ranking obtained as a result of the External Evaluation.

Whilst normally the highest ranked proposals will be selected for funding, the AE Management Board might have fair reasons for objecting to a specific third party, like the alignment with Change2Twin goals and

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\(^7\)The complete composition of the ‘AE Management Board’ is listed in the Annex 2 of this Guide for Applicants.
scope, the ability to achieve the highest impact possible, commercial competition, as well as the existence of significant ethical concerns or a potential conflict of interest. In this case, the choice may pass to the next-ranked proposal.

The exact number of proposals approved will be decided based on the overall quality of the proposals.

After the consensus meeting phase, we will communicate the results to the applicants.

4.4 WHAT’S NEXT? SUB-GRANT AGREEMENT SIGNATURE

Before your participation in the Change2Twin support programme starts, we will ask you to sign the Sub-Grant Agreement with the Change2Twin consortium. To do so, we will ask you to provide documents regarding your formal status (for the details please check our Frequently Asked Questions Document). Please do it within the deadlines that will be communicated to you. If you fail to deliver the requested documents on time, without clear and reasonable justification, we will exclude you from the further formal assessment and you will be replaced with a company from the reserve list.

5 OUR SUPPORT PROGRAMME AND PAYMENT ARRANGEMENTS

The beneficiaries of the Assessment voucher will receive a lump sum up to 10 000 Euro per project. You need to specify in your application’s budget that the grant obtained will be equal to 70% of the costs estimated for the execution of the project. Taking into account the financial support limit (10 000 Euro) a total cost over 14 285 Euro will not be taken into consideration when calculating the 10 000 Euro lump sum.

The lump sum is a simplified method of settling expenses in projects financed from Horizon 2020 funds. It means that grantee is not required to present strictly defined accounting documents to prove the cost incurred (e.g. invoices), but is obliged to demonstrate the implementation of the project in line with the milestones set in the Sub-Grant Agreement.

In order to receive the financial support, you will need to provide the first draft of the assessment performed by the certified DIH. The Mentoring Committee will then verify that the deliverable meets the quality standards and that it has been submitted within the required deadline. The AE Management Board will review and validate the Mentoring Committee’s proposal, putting special attention to the ‘under threshold’ cases, if any, by taking into consideration all possible objective reasons for underperformance (i.e. external factors which might have influenced the beneficiaries’ performance). The AE Management Board will take the final decision, and approve the payments.

The lump sum does not release you from the obligation to collect documentation to confirm the costs under fiscal regulation. For a more detailed payment schedule please check the FAQ.
6 CONTACT US

How can we help you?
If you have extra questions regarding our Open Call process you can post your questions at our Helpdesk space or you can send us a message to opencalls@change2twin.eu

In case of any technical issues or problems, please include the following information in your message:
- your username, telephone number and your email address,
- details of the specific problem (error messages you encountered, bugs descriptions, i.e. if a dropdown list isn’t working, etc.), and
- screenshots of the problem.

Complaints
If, after receiving the results of one of the evaluation phases (when foreseen), you consider that a mistake has been made, you can send us your complaint. To do so please send us your complaint in English by email to opencalls@change2twin.eu including the following information:
- your contact details (including email address),
- the subject of the complaint,
- information and evidence regarding the alleged breach.

You have 3 calendar days to submit your complaint starting from the day of becoming aware of the grounds for the rejection. We will review your complaint within no more than seven calendar days from its reception. If we need more time to assess your complaint, we will inform you by email about the extension. We will not review anonymous complaints as well as complaints with incomplete information.

Please take into account that the evaluation is run by experts, and we do not interfere with their assessment, therefore we will not evaluate complaints related to the results of the evaluation other than related to the mistakes in the evaluation of the eligibility criteria.

7 LAST BUT NOT LEAST - FINAL PROVISIONS

Any matters not covered by this Guide will be governed by Polish law and rules related to the H2020 and EU grants.

Please take into account that we make our best effort to keep all provided data confidential; however, for the avoidance of doubt, you are solely responsible to indicate your confidential information as such.

The Change2Twin consortium might cancel the call at any time, change its provisions or extend it. In such a case we will inform all applicants about such change. Signature of the Sub-Grant Agreement is an initial condition to establish any obligations among applicants and any consortium partners (with respect to the obligation of confidentiality of the application).

Did not find what you were looking for? You may want to check our FAQ.
## 1 ANNEX 1: INFORMATION CLAUSE

The data controller is FundingBox Accelerator sp. z o.o. (Al. Jerozolimskie 136, 02-305 Warsaw, Poland).

In all matters regarding personal data, you can contact us using the following email address: privacy@fundingbox.com

### PURPOSES, LEGAL BASIS AND PROCESSING PERIOD

<table>
<thead>
<tr>
<th>The purpose and legitimate interest of processing</th>
<th>Legal basis for processing</th>
<th>Period</th>
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<tbody>
<tr>
<td>To run an Open Call and collect data necessary to evaluate applications submitted in the Open Call</td>
<td>Legitimate interest of Funding Box (based on Article 6, paragraph 1 (f) of GDPR) which is fulfilling the obligations and our other interests related to this purposes</td>
<td>6 years from the end of the year in which the Change2Twin Project ended.</td>
</tr>
<tr>
<td>To realize the Project goals described in the Grant Agreement (communication, reporting, collaborating with other project partners)</td>
<td></td>
<td></td>
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<tr>
<td>In order to consider potential complaints</td>
<td></td>
<td></td>
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<tr>
<td>In order to possibly establish and enforce claims or defend against them</td>
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### DATA RECEIVERS

Data controller will transfer personal data only to trusted recipients such as entities belonging to the FundingBox’s capital group, evaluators, IT service providers, accountants, law firms, postal and courier companies (who process personal data on the controller’s behalf).

Due to the fact that we use the services of Google LLC, your data may be transferred to the USA. We have concluded an agreement with Google LLC - the so-called Standard Contractual Clauses. This means that in accordance with the decision of the European Commission No. 2010/87 / EU of February 5, 2010, your personal data may be processed by this company in the USA. More information about the decision at: https://eur-lex.europa.eu/legal-content/PL/TXT/?uri=celex%3A32010D0087
To realize the Project data can be transferred also to Project Partners (complete list of the project partners is available at the email address: privacy@fundingbox.com), European Commission and other affiliated entities.

**RIGHTS OF DATA SUBJECT**

Due to the fact that we process your personal data, you have the right to:

1) request access to your personal data,
2) demand the rectification of your personal data,
3) request to remove or limit the processing of your personal data,
4) complain with the supervisory authority (The President of the Personal Data Protection Office, Warsaw, Poland, [https://uodo.gov.pl/en](https://uodo.gov.pl/en)).

You also have a right to object to processing of your personal data (according to the Article 21 of GDPR).

**INFORMATION ABOUT VOLUNTARY OR OBLIGATORY DATA PROVISION**

Providing data is voluntary, although it is necessary to participate in the Open Call. Without providing your data, it is not possible to contact you and evaluate the application.
2 ANNEX 2: GLOSSARY

**Application Experiment (AE) Management Board**: Committee responsible for selecting the best proposals in the ‘Consensus Meeting’, as well as authorising payments to beneficiaries after validating the quality of deliverables. It is composed by the 10 core partners of Change2Twin: SINTEF, TTECH-IND, Jotne, FBA, TNO, BOC, UNIBO, CLOUDBROKER, IR and PSNC.

**Financial Support to Third Parties (FSTP)**: mechanism of distributing financial support to beneficiaries (such as SMEs or individuals) under the conditions established in Regulation (EU, Euroatom) No 1268/2012 and Regulation (EU) No 1268/2012. Detailed rules for granting support are set out in the Grant Agreement concluded between the financial support provider and the European Commission.

**Mentoring Committee**: Committee in charge of evaluating the quality of the deliverables, proposing the project's valuation in terms of up/under threshold, to be finally approved by the ‘AE Management Board’. It is composed by the Technical Mentors.

**Sub-Grant Agreement**: legal contract signed between FundingBox Accelerator sp. z o.o. (as responsible for the organization of the Open Calls and management of the funds for third parties) and the applicants selected to enter the Change2Twin Support Programme. The contracts include detailed information about the rules of the grant, obligations and applicable legal requirements. More information can be found in Section 4.4 of this Guide.