PHOENIX

Requests for proposal 2
Annex 2 - Guide for Applicants

Contents

1. Introduction

This document contains a guide for applicants with the necessary information to apply to the Request for Proposals 2 of PHOENIX, including the eligibility criteria, instructions to apply, an overview of the evaluation process, funding and relevant legal information, and the use-case template (Link) that applicants must fill to apply.

1.1 About PHOENIX

Under the Energy Performance of Buildings Directive (EPBD) of 2010, the EU developed the first strategy to increase the energy efficiency of buildings, which consist in the creation of Energy Performance Certificates (EPCs) for buildings that are being constructed, sold, or rented. An EPC provides information to the customers about the energy performance rating of the building and recommendations for cost-effective improvements. One step further has been taken by the EU in the 2018 revision of the EPBD, which aims to further promote smart building technologies, through the establishment of a Smart Readiness Indicator (SRI) for buildings. The SRI shall provide information on the technological readiness of buildings for interacting with their occupants and the energy grids, and their capabilities for more efficient operation and better performance through ICT technologies in the form of services. Therefore, the SRI should accelerate the transformation of the European Building Stock from standard and manually managed buildings to smart buildings. Smart buildings integrate cutting edge ICT-based solutions for energy efficiency and energy flexibility for their daily operation. Such smart capabilities can effectively assist in creating healthier and more comfortable buildings with lower energy consumption and lower carbon footprint.

The realisation of smart buildings depends mainly on the digital transformation with ICT technologies (i.e. Internet of Things - IoT, Artificial Intelligence – AI and Data Analytics) that is inundating all sectors (such as health care with the e-Health or industry with the Industry 4.0). In the case of buildings, this transformation is expected to have a large impact whose consequences will be highly beneficial for society when carried out in an adequate way.

The digital transformation of the existing European building stock requires an ICT-based solution, which covers from the technological improvements of equipment to the business exploitation of the innovations born in this project. The architecture that PHOENIX will use to increase the smartness of existing buildings is compound by six layers: physical asset, seamless integration, building knowledge, security & privacy, smart services and business exploitation (i.e. building end-users and grid stakeholders).

In existing buildings, different equipment is already installed and need to be either upgraded or replaced to provide new services that will benefit both users and the grid. However, the number of existing systems and appliances is huge and without a proper classification, significant efforts would be made to increase the smartness of some equipment that could bring few benefits. Furthermore, multiple Plug-&-Play IoT gateways, sensors, actuators and communication systems need to be used to monitor and control the operation of these systems and appliances. All these devices will produce a large amount of data in different formats and also they might communicate using different communications protocols. An inappropriate homogenisation of the communications protocols and data formats will not allow a successful upgrade of the most important legacy systems and appliances. The aforementioned problems are addressed in the asset and integration layers.

Data by itself does not give intelligence to the building, but the data analytics and control strategies can do it. In the knowledge layer, all data gathered by different sources need to be

properly analysed to support decision-making of individuals (occupants, managers, energy utilities agents) and/or artificial intelligence related to the operation of the systems and appliances in the building. The major threats that data and communication systems face are potential security and privacy risks to the end-users, which include unauthorised access and abuse of sensitive information. This may result in a significantly reduction of end-user's confidence in ICT technologies and therefore impede its full realisation. These security, privacy and trust issues will be properly addressed in the vertical (Protection) layer.

The final destination of these innovations in existing buildings is the creation of new services to occupants and the grid, which includes energy efficiency. Most of current automation technologies in existing buildings, if any of these exist in the building, focus on the improvement of the energy efficiency in the buildings. However, the energy-driven automated operation of systems and appliances have created human-related problems such as health issues, uncomfortable workplaces, overall dissatisfaction with automation, etc. Therefore, new user-centric services need to be created to meet the people's requirements. Services for grid flexibility (e.g. demand response) has been studied for many years, however, their application at distribution level has been limited. Thus, new services for the grid need to be created to successfully apply these flexibility requirements. All these services are covered in the function layer. Finally, the business layer will focus on the exploitation of all technological innovation and new services born in PHOENIX.

Vision: PHOENIX aims at changing the role of buildings from unorganised energy consumers to active agents orchestrating and optimising their energy consumption, production and storage, with the goal of increasing energy performance, maximising occupants' benefit, and facilitating grid operation.

PHOENIX's goals are well aligned with the challenges summarized earlier. The project will design a portfolio of ICT solutions covering all aspects from hardware and software upgrades needed in legacy equipment and optimal deployment of sensors, to data analytics and services for both building users and energy utilities. PHOENIX will take advantage of artificial intelligence technologies, as well as edge/cloud computing methods, to provide the highest level of smartness to existing buildings. The tools that will result from the different work packages will offer the possibility of establishing a new framework that will enable the optimisation of the energy use and infrastructure exploitation, while at the same time facilitate the creation of new SMEs and Start-Up ideas to exploit new revenue streams and business opportunities. To achieve this ambitious goal, PHOENIX relies on a consortium which has the technological knowledge and expertise to understand the social and technical requirements and translate them into ICT innovations (i.e. IoT, AI and Data Analytics) for the integration and smartness upgrading of existing buildings with legacy equipment and systems. To demonstrate the real impact and replicability, the proposed solution with ICT innovations and cost-effective services will be validated in 4 different pilot countries at European level (i.e. Ireland, Greece, Sweden and Spain). Moreover, the consortia have high expertise and business capacities to disseminate and exploit the PHOENIX results.

Mission: PHOENIX will provide a portfolio of ICT solutions to increase the smartness of legacy systems and appliances in existing buildings which will increase the SRI of existing buildings. These improvements will translate in human-centric new services for users and an improvement on both execution of demand response actions and communication of data.

Key Objectives

1. Allow Adapt-&-Play seamless integration of domestic appliances, legacy equipment and building systems.

2. Create building knowledge with innovative techniques to upgrade the smartness of existing buildings.
3. Enable real-time communication with energy stakeholders to optimise the grid operation.
4. Provide cost-effective services for building end-users to maximize the energy efficiency and the overall performance.
5. Allow security and privacy of building data regarding the revised EPBD and the GDPR law.
6. Create suitable business models and exploitation strategies to target the broad market of smart buildings.
7. Develop human-centric approach and training/awareness activities to prepare citizens for smart buildings.

1.2 Concept

Energy efficiency in buildings (EEB) is a complex domain due to the high variety of legacy equipment (i.e. fridge, dryer, HVAC, lighting, etc.), smart devices (i.e. metering) and ICT-based systems employing many different technologies for communications, sensing, and data processing. To facilitate the digital transformation of traditional buildings towards smartness and energy-efficient environments, standardization organizations have come forth to establish guidelines and standards. Among these organizations are the Industrial Internet Consortium (IIC) that has worked with multiple stakeholders and academicians to define new cross-domain reference architectures such as Industrial Internet Reference Architecture (IIRA). The IIRA architecture defines multiple layers (business, functional, information, communication, integration and asset - adopted from ISO/IEC/IEEE 42010:2011) with key system characteristics (i.e. security, privacy and resilience). Moreover, in compliance with IIRA, FIWARE and IDSA (Industrial Data Space Association) proposes a similar five-layers structure expressing various stakeholders' concerns and viewpoints at different levels of granularity that can be adapted to different sizes of buildings. FIWARE and IDS are creating a secure and trustworthy data exchange which addresses interoperability with many different equipment and devices used in EEB scenarios.

Based on previous reference architectures (i.e. IIRA, IDS and FIWARE), we propose a PHOENIX architecture divided into five horizontal layers and a security vertical layer in order to develop, integrate and deploy a secure interoperable ecosystem for heterogeneous EEB scenarios as well as the interactions with non-technical end-users and stakeholders. The PHOENIX architecture is depicted in Figure 1 using a high-level conceptual design based on the flow of generating data, information and knowledge from the building assets to the services and business opportunities through the following layers:

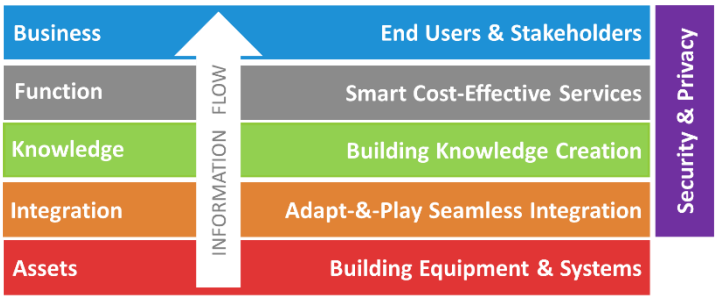

Figure 1: Conceptual Architecture of PHOENIX.

- Business layer represents the point of views and the interactions with the end-users (e.g. building owners) and stakeholders (e.g. ESCO, Aggregators, etc) based on an active democratic participation.
- Function layer includes multiple smart cost-effective services offered to the end users to optimize the energy saving, the occupants' satisfaction, the overall performance of the buildings and the grid operations.
- Knowledge layer enables modular tools for creating building knowledge, based on homogenized data through data processing and analytic to upgrade the smartness of the buildings.
- Integration layer provides the mechanisms for the remote control and data monitoring from different building equipment, systems and external data sources (i.e. weather predictions) with heterogeneous protocols and technologies.
- Asset layer consists of heterogeneous legacy equipment and systems already deployed in the buildings that must be integrated and managed intelligently.
- Protection layer provides the techniques and protocols to ensure the security, privacy and trust of the data exchange in all the horizontal layers.

The PHOENIX architecture will be developed with open & secure API interfaces to enable deep integration of existing building systems, the incorporation of new mechanisms or tools by third-parties as well as the development of new services and business opportunities between multiple actors. The PHOENIX architecture will be based on standardized protocols (e.g. HTTPS) for a secure data exchange made up of trusted partners. PHOENIX will build an interoperable architecture with advanced capacity to incorporate and process all kinds of building data and knowledge to improve the intelligence of services offered to end-users and stakeholders. PHOENIX will develop user-friendly services for inexpert users (i.e. building owners and occupants) to facilitate the easy use as well as to maximize the occupants comfort. Moreover, PHOENIX services will be implemented based on a cost-effective principle to minimize the costs of installation and maintenance as well as to maximize the energy savings. More details about the PHOENIX layers including their main components and their interactions are described below (see Figure 2).

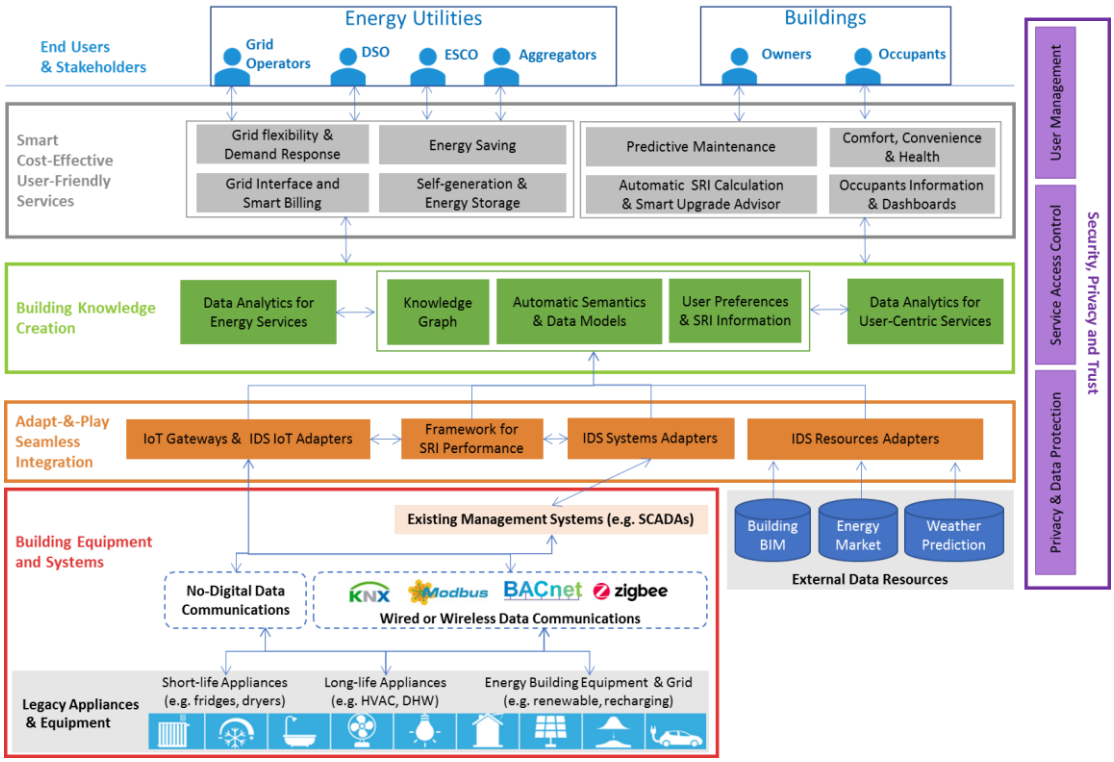

Figure 2. ICT architecture proposed in PHOENIX to form the Building Smartness Hub.

1.3 Request for Proposal Overview

The project will use the request for proposal mechanism to open up the applicability of the PHOENIX platform at the same time that we get to know the developments by third parties. The stakeholder that achieves the funding of the request will bring new views to the developments and will add functionalities and/or robustness to the solution.

PHOENIX will organize four requests for proposal to widen the use-cases addressed by the project, to robust the collection of planning engines, and to increase the number of technologies integrated. Different proposals are expected on the five different requests. As an example, the following list show potential topics that are welcome, but the requests should not be limited to them.

1. **Evaluation and testing of APIs and connections**.
2. **Proposals request for the development of new services.**
3. **Evaluation of small-size external pilots.**
4. **One instance of business catapult.**

The first opening has been issued early in the project so stakeholders can have their inputs at the early stages of the development of the solution providing developments that will be of great use for subsequent requests. The diagram behind explains the way in which the proposals will be managed:

RFP Release: This is a fixed date RFP. All submittals will be kept as they are received as soon as the objectives fit within the request requirements. The submission will include the template (Link) filled with all the necessary information. Proposals without the information requested will be dismissed.
Project Down-Select Notice: Projects selected for further consideration after the submission will be notified and presented with details of PHOENIX proposed non-binding offer.
Negotiations: Within 7 days of Project Down-Select Notice, Respondents will provide notification of its desire to enter negotiations and further consideration, as well as a schedule for due diligence deliverables (which will be no later than 30 days after PHOENIX notification).
Closing and Funding: PHOENIX and the Respondent will work as promptly as practicable to finalize definitive documents, approvals, and to establish the final closing and funding terms.

Within the project, the funding to third parties aims to upgrade and extend PHOENIX technology offer beyond consortium partners and enlarge the outreach of the project deployments. For this purpose, the consortium has planned to devote a budget for the cascade funding across a total of up to five projects in total to select third-party developments;

Table 2: Requests for Proposal Briefing.

Proposal request rounds				
Rounds	**Desired topic (not limiting)**	**#projects**	**#months**	**Total**
1	Validation of APIs and connectivity	1	4	40,000
2	New services	2	4	80,000
3	Small size pilots	1	4	40,000
4	Valorisation	1	4	40,000
		5	**16**	**200,000**

This request for proposal document is specifically dedicated to the second request for proposals and outlines the application for this request. The winners of the opening will be given the opportunity to contribute to the platform. It has been considered that projects for the development of two new services based on a multidevice app (mobile/tablet) for direct communication for the PHOENIX solution, push up of notifications and immediate feedback, and the second service will consist on the development of a repository data with a list of devices, with their respective brands and models whose technical characteristics make them compatible with the PHOENIX platform, and will also be connected to the automatic SRI, therefore it will serve both to give proposals and recommendations to the user on the installation of devices of specific brands and models that allow increasing the SRI score in a certain domain.

Participants are invited to suggest other lines that can be beneficial to the services defined above.

The participants will have to consider that the project will follow **the principles of open innovation** and that this philosophy will be of great importance for the projection of the requests.

Applicants are encouraged to submit applications that involve developing the following two services and that there is coherence in the integration of these new services and their operability with PHOENIX solution. Special attention should be paid to the multidevice app service for having a simple but clear interface for the user to receive notifications, give feedback, have a FAQ section, etc. as well as its integration with other services already developed. In addition, the repository data will contain brands and models of devices to give suggestions and proposals to the user and improve the SRI score, therefore, it will be of great importance that this service is compatible with the automatic SRI system being developed in PHOENIX and therefore the proper integration with the PHOENIX platform.

2. Eligibility Criteria

To be considered eligible, all applicants must meet all of the requirements outlined in this section.

2.1 What types of projects will be eligible?

Projects must clearly address the PHOENIX technology and fit within the objectives of the project, as presented above in section 1.1. Moreover, the participants should demonstrate their long-term commitment to the PHOENIX research and innovation agenda. The new participants will work to provide the developments and demonstrate that the suggested solution advances from the beginning of the project, reaching a higher maturity level and take-up by the end of the action. Thus, third-party projects must demonstrate a substantial progress with a particular focus on the sustainability of the outcomes.

2.2 Type of Applicants

The target applicants are:

- Single organisations.

The application of groups of organisations is not eligible for this call.

The participating organisations shall not have been declared bankrupt or have initiated bankruptcy procedures.

The organisations applying shall not have convictions for fraudulent behaviour, other financial irregularities, and unethical or illegal business practices.

The organisations applying shall not be under liquidation or be an enterprise under difficulty accordingly to the Commission. Regulation No 651/2014, art. 2.18.

2.3 Eligible Countries

Only Applicants legally established/resident in any of the following countries (from now identified as the "Eligible Countries") are eligible:

- The Member States (MS) of the European Union (EU), including their outermost regions (https://european-union.europa.eu/principles-countries-history/country-profiles_en?page=0)

- The Overseas Countries and Territories (OCT) linked to the Member States (https://ec.europa.eu/international-partnerships/where-we-work/overseas-countries-and-territories_en)

- H2020 associated countries (those which signed an agreement with the Union as identified in Article 7 of the Horizon 2020 Regulation): according to the updated list published by the EC

(https://ec.europa.eu/research/participants/data/ref/h2020/grants_manual/hi/3cpart/h2020-hi-list-ac_en.pdf)

- The UK applicants are eligible under the conditions set by the EC for H2020 participation at the time of the deadline of the call.

2.4 Language

English is the official language for PHOENIX requests for proposals. Submissions done in any other language will be disregarded and not evaluated.

English is also the only official language during the whole execution of the PHOENIX program. Therefore, all submissions of reports or/and other documentation will be done in English in order to be eligible.

2.5 Conflict of Interest

Applicants shall not have any actual or/and potential conflict of interest with the PHOENIX selection process and during the whole programme. All cases of conflict of interest will be assessed case by case. In particular, applicants cannot be PHOENIX's consortium partners or affiliated entities nor their employees or co-operators under a contractual agreement.

If a conflict of interest is discovered and confirmed at the time of the evaluation process, the proposal will be considered as non-eligible and will not be evaluated.

2.6 Other

All applicants must confirm:

- Their project is based on original works and any future developments are either free of third-party right or explicitly declared.

- They are not 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.

2.7 Admissibility and Eligibility Check

The request for proposals period will be of one (1) month. Admissibility and eligibility criteria for each proposal are checked by the PHOENIX Consortium. A proposal may be declared ineligible or inadmissible at any stage.

Applicants should fill a form and attach the requested documents via the project platform. A full list of candidates will be drafted containing their basic information for statistical purposes and clarity, in compliance with the GDPR.

To be considered admissible, a proposal must be:

- Submitted electronically before the call's deadline.
- Readable, accessible and printable.
- Complete and according to the guidelines.

Proposals will only be considered eligible if their content meets the eligibility criteria outlined in the relevant sections of this guide. An eligibility filter enables the creation of a short list of proposals to be evaluated.

2.7.1 Eligibility filter

An automatic filtering to discard non-eligible use-cases will follow the short list. Eligibility criteria check will verify:

- The applicant is a natural person or an organization.
- The existence of a legal entity (for organisations) in an eligible country.
- The uniqueness of the proposal (one proposal per company or per individual).
- The use-case template has been duly filled and uploaded.
- Applicant has submitted a completed application before the deadline.
- Use-Case proposals are in English.

3. Preparation and Submission of the Use-Case Proposal

- Applicants should access the project website to apply.

- Participants are requested to carefully read and follow the instructions in the form. Evaluators will be instructed not to consider extra material in the evaluation.

- On the website, follow the guidelines indicated (included in Annex 1). The submission will be done through email which is directly linked with the PHOENIX consortium.

- Applicants are required to register to the portal to be able to submit a proposal.

- Applicants are requested to answer all mandatory questions (with no exception) of the portal.

- Applicants are requested to upload the proposal according to the template. The project must strictly adhere to the guidelines provided by the PHOENIX consortium in the project website.

- Additional material, which has not been specifically requested in the online application form, will not be considered for the evaluation of the call. Data not included in the proposal will not be taken into account.

- It is strongly recommended not to wait until the last minute to submit the proposal. Failure of the proposal to arrive on time for any reason, including communication delays, will lead to automatic rejection. The time of receipt of the message as recorded by the submission system will be definitive.

- PHOENIX offers a dedicated support channel available for proposers at request4proposal@eu-phoenix.eu for requests or inquiries about the submission system or the call itself. Those received after the closure time of the call will neither be considered nor answered.

- The information provided shall be actual, true and complete and shall allow the assessment of the use- case.

- The preparation and submission of the project and other actions that follow this procedure (such as withdrawal) fall under the final responsibility of the applicant.

3.1 Multiple Submission

This call is competitive, and applicants should focus on one specific topic, therefore only one use-case per applicant or one use-case per organisation may be submitted to this call.

Additional proposals submitted by the same applicant, or the same organization, will be declared non-eligible and will not be evaluated.

3.2 Confidentiality and Deadline

Any information regarding the third-party proposal will be treated in a strictly confidential manner.
Only proposals submitted before the deadline will be accepted. No additions or modifications to received proposals will be considered after the closure of the call.

3.3 What happens after the proposals are submitted?

Proposals must be submitted before their deadline. To avoid missing the deadline, you are encouraged to submit your proposal as soon as possible.

Immediately after the submission deadline is over, the evaluation process will begin. Experts will evaluate the proposals and score them adequately, according to the quality of the content presented.

3.4 Evaluation Process

3.4.1 Proposal Evaluation and Access to the PHOENIX funding

Proposals are submitted in a single stage through the platform and evaluated as presented in figure 2 of the request for proposals text document.

4. Agreement Signature of the Request for proposals

All the legal issues are accurately covered by the planned contracts with the granted beneficiaries. A written grantee agreement will be signed with successful applicants. It will foresee, the special clauses derived from H2020 in cascading granting, the payment schedule, the conditions (milestones) and general legal text issues of rights and obligations by the PHOENIX consortium and each grantee, including IPR and audit procedures.

The grantee agreement will also have a set of annexes like technical description of the project to be done (form submitted), bank account information form, guidelines of the call, status information and any other document required by PHOENIX to assure the correct execution of the granted projects.

4.1 Scientific Misconduct and Research Integrity

Issues of scientific misconduct and research integrity are taken very seriously. In line with the Horizon 2020 Rules for Participation, appropriate action, will be taken against any applicants/beneficiaries found to have misrepresented, fabricated or plagiarised any part of their proposal.

4.2 The Negotiation Process

The objective of the negotiations is to fulfil the legal requirements between the PHOENIX consortium and each selected project of the call. It covers essentially the status information of the beneficiaries. The legal requirements for legal entities are provided in the table hereafter.

Table 2: Legal Requirements for legal entities.

For Legal Entities (Organisations)
A legal existence: Company Register, Official Journal and so forth, showing the name of the organization, the legal address and registration number and, if applicable, a copy of a document proving VAT registration (in case the VAT number does not show on the registration extract or its equivalent)

Specifically, for organisations:

Applicants will need a proof of their organisation condition:

- If the applicant has been fully validated as an organisation on the Beneficiary Register of the H2020 Participant Portal, the PIC number must be provided.
- If the applicant has not been fully validated as an organisation on the H2020 Participant Portal, the following documents will be required to prove the status:

(i) In the event the beneficiary declares being non- autonomous, the balance sheet and profit and loss account (with annexes) for the last period for upstream and downstream organizations is required.

(ii) Status Information Form. It includes the headcount (AWU), balance, profit & loss accounts of the latest closed financial year and the relation, upstream and downstream, of any linked or partner company.

(iii) Supporting documents. In cases where either the number of employees or the ownership is not clearly identified: any other supporting documents which demonstrate headcount and ownership such as payroll details, annual reports, national regional, association records, etc.

The information request, by the PHOENIX consortium will be done including deadlines. Failure to meet the stated deadlines will result to the termination of the negotiation process.

5. Financial Support of Provided

The financial support to third parties within the call will be in the form of a grant awarded.

5.1 Indicative Distribution of the funds

PHOENIX foresees the following budget distribution in Call 1 and Call 2:

Call proposals				
Call #	Budget	# projects	# months	Total
1	40,000€	1	4	40,000€
2	80,000€	2	4	80,000€

Table 3: Budget Distribution - Call 1 and Call 2.

5.2 Origin of the Funds

The selected candidate will sign a dedicated Grant Agreement with the PHOENIX project coordinator (on behalf of the PHOENIX Consortium). The funds attached to the Grantee Funding Agreement come directly from the funds of the European Project PHOENIX, and the consortium is managing the funds according to the Grant Agreement Number 893079 signed with the European Commission.

As it will be indicated in the Grant Agreement, the relation between the sub-grants and the European Commission through PHOENIX project carries a set of obligations to the grants recipients with the European Commission. It is the task of the grantees to accomplish them, and of the PHOENIX consortium partners to inform about them.

5.3 Third-Party Activities after the Sub-Grant Agreement Signature.

The selected grantees will engage with PHOENIX consortia as third parties during the length of the project. Owners will be invited to attend at least one webinar and one workshop during this period. The goal of these activities is to engage the selected stakeholders from the request for proposals in the project objectives & activities, as well as to guide them through the process of detailing their proposal for publication on the upcoming call for innovators.

For this purpose, the selected third parties will enter a process that comprises of the following activities:

(i) A request for proposals workshop: 1-day meeting between selected requests for proposals providers and project partners, aiming to work together on the detailed description of the challenge for the call.

(ii) Due to Covid-19, the workshops will be online. The payment is conditioned to sub-grantee agreement and the participation in the workshop.

6. Applicants Communication Flow

6.1 General Communication Procedure

Following the review procedure, the applicants will be notified whether they passed or failed. In case of failure, the applicants will receive information explaining the reasons for their exclusion.

6.2 Appeal Procedure

If the applicant considers that a mistake was made during the assessment process, or that the evaluators acted unfairly or have failed to comply with the rules of this PHOENIX Request for proposals, and thus their interests have been prejudiced, the following appeal procedures are available:

A complaint should be drawn up in English and submitted by email to request4proposal@eu-phoenix.eu. Any complaint made shall include:

- Contact details.
- The subject of the complaint.
- Information and evidence regarding the alleged breach.

Anonymous complaints or those not providing the mentioned information will not be considered.

Complaints shall also be sent within five natural days of the applicants' receipt of the evaluation results.

As a general rule, the PHOENIX team will examine complaints with the goal of issuing a formal notice or closing the case within twenty days from the date of reception of the complaint, assuming that the complainant has submitted all the required information. Whenever this time limit is surpassed, the PHOENIX Consortium will inform the complainant by email explaining the reasons for the unforeseen delay and the next steps.

7. Intellectual Property Rights (IPR)

With respect to IPR, the principles that will be used are those of the PHOENIX project. The acceleration programme does not affect the ownership of any intellectual property in any background or in any other technology, design, work, invention, software, data, technique, know-how, or materials. The intellectual property will remain the property of the third-party that contributes with PHOENIX.

8. Support for the Applicants

For more information about the PHOENIX Request for proposals, please check the Request for proposals section included at the documentation, where you will find the application material and instructions on how to apply.

9. Specific important points of the subcontracting

The subcontracting of third parties has requirements that have to be fulfilled.

1. The consortium will award the subcontracts ensuring the best value for money or, if appropriate, the lowest price. In doing so, they will avoid any conflict of interests (key elements to appreciate the respect of this principle are the award of the subcontract to the bid offering best price-quality ratio, under conditions of transparency and equal treatment).

2. Agreements between the consortium and the subcontractor shall be signed.

3. Evidence that the services are provided by the subcontractor shall be provided.

4. All subcontracts have to be supported by signed agreements between the consortium and the subcontractor.

5. Evidence that the services were provided by the subcontractors shall be presented.

6. All documents of the Subcontracting procedures will have to be kept.

10. Indicative Timetable

The table below presents the indicative dates during which each phase of Call 2 will take place.

Description	Indicative Dates
Call Announcement and Launch	20th October 2022
Call Closure and Submission Deadline	7th December 2022

Table 3: Timetable - Requests for proposal

11. Checklist

- Does your planned work fit with the Requests for proposal? Check that your proposed work does indeed address the AI Planning technology.

- Is your proposal eligible? The eligibility criteria are given in section 2. Eligibility Criteria. In particular, make sure that you satisfy the minimum participation requirements.

- Budgetary limits. Check that you comply with any budgetary limits as expressed in chapter 6. Proposals that do not meet the eligibility requirements will be considered ineligible and will not be evaluated.

- Does your proposal fulfil questions requests/comments? Proposals should be precise, concise and must answer to requested questions, which are designed to correspond to the applied evaluation. Omitting requested information may lead to lower scores and possible rejection.

- Have you prepared the proposal description according to the guidelines during your application?

- Have you maximised your chances? There will be a great deal of competition. Therefore, edit your proposal to strengthen or eliminate weak points.

- Have you submitted your proposal before the deadline? It is strongly recommended not to wait until the last minute to submit the proposal

- Do you need further advice and support during the proposal phase? You are strongly advised to communicate this with the PHOENIX team.

- Do not forget that it is mandatory for the applicant organisation to have a valid VAT number during negotiation time.

12. Points of Contact

The PHOENIX consortium will also provide information to the applicants via the project website, so that the information (question and answer), is visible to all participants.