



AI REDGIO 5.0 OPEN CALL 1

Guide for applicants

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Abbreviations and Acronyms:	
ICT	information and communication technologies
AI	Artificial Intelligence
SME	Small-medium enterprise
EC	European Commission
EU	European Union
FSTP	Financial Support to Third Parties
SAE	Smart Anything Everywhere
I4MS	ICT innovation for Manufacturing SMEs
EMS	Evaluation Management System
ESR	Evaluation Summary Report
KPI	Key Performance Indicator
CV	Curriculum Vitae

1. Introduction to AI REDGIO 5.0

AI REDGIO 5.0. aims at reinforcing the alliance between Vanguard European regions and EDIH for the adoption of AI-at-the-Edge by European manufacturing SMEs. This project gravitates towards the fulfilment of three main goals:

- Enabling the evolution of Manufacturing SMEs towards Industry 5.0.
- Evolution of cloud AI Technologies to AI-at-the-Edge procedures.
- Evolution and adaptation of H2020 programme into Horizon and Digital Europe programmes.

In order to achieve these goals, AI REDGIO 5.0. leans on the outcomes of the H2020 I4MS AI REGIO programme, adapting it to the requirements of the Industry 5.0. and implementing a competitive AI-at-the-Edge Digital Transformation for Small and Medium Enterprises. The [AI REGIO](#) project had a three-year duration and played an instrumental and successful role in the adoption of AI in the manufacturing sector by helping both providers and users of AI solutions. 36 partners from 12 different countries took part in this project, which involved more than 20 SME experiments about AI-driven transformations to build the factories of the future.

AI REDGIO 5.0 will maintain the momentum of AI technology adoption in Manufacturing SMEs, while bringing in depth and breakthrough changes to the ongoing efforts. In particular, the project considers the following aspects:

- Conceptual framework and reference architecture for AI-at-the-edge Industry 5.0 applications and experimentations.
- Secure and trustworthy edge-to-cloud continuum data and computational space for highly distributed AI applications.
- Interoperability by design with the pan-EU AI-on-demand platform and its ecosystem of H2020 and Horizon Europe innovation actions.
- Transition from regional DIHs to a network of EDIHs.
- Test-before-invest experiments in AI Didactic Factories and TEF (Testing and Experimentation Facilities) for SME-driven applications.
- Support the transition towards sustainability, through the ecosystem development and replication to SMEs.

2. AI REDGIO 5.0 1st Open Call for experiments

This section presents the objective of the call, who can apply and the eligibility criteria.

2.1. Objective

The objective for the first open call of AI REDGIO 5.0 project is to select up to **10 SME-driven experiments** focused on the implementation of AI at the Edge and Industry 5.0 systems with the aim of improving existing solutions, products or processes in the manufacturing area. Additionally, the open call will contribute to extend the domains of AI REDGIO 5.0 and benefit directly manufacturing SMEs and small mid-caps.

We expect 3 topics to be covered by experiments. At least 2 experiments will be selected for each of the topics.



Technological topics:

1. TOPIC 1: AI at the Edge applications and edge-to-cloud continuum

AI plays a significant role for almost any industry and the same is a reality for manufacturing. In AI REDGIO 5.0 the main goal is to showcase the advantages AI can bring to manufacturing enterprises when this is performed at the edge, making use of the edge-to-cloud continuum, capitalising on the capabilities that are today offered by novel cloud-to-edge execution frameworks and infrastructures, as well as AI models and libraries that are in a position to realise local execution. Using such approaches manufacturing industries and SMEs are able to grasp all the benefits that accompany this approach (e.g., low latency, minimal data transfer, data sovereignty and privacy, etc.).

Experiments to be selected should demonstrate the above-mentioned approach, with providing real-life use cases that call for AI execution at the edge, or using hybrid cloud-edge infrastructures, and building the necessary services and AI models to realise this target. Experiments shall design the necessary AI pipelines to execute their use cases, and local execution of the AI models should be performed on edge computing environments, such as the one specified by the [AI-REDGIO Open Hardware](#) or similar, which applicants have to deploy. Moreover, the re-use (and at a later experiment stage the publication) of AI models to the [AI-on-Demand platform](#) is strongly encouraged.

Applications of interest include, but are not limited to, the use of AI for predictive and prescriptive maintenance, automation, manufacturing operations planning and scheduling, waste reduction, energy efficiency, resource optimisation, quality control, circularity, resource optimisation, etc.

In all experiments, applicants should clearly showcase how Human-AI teaming can be achieved in their use case, where AI and human interaction are blended to benefit both the AI system, as well as human operators.

2. TOPIC 2: Industry 5.0 and human-centric, resilient and sustainable manufacturing

Whereas Industry 4.0 advocates the fostering of industrial activity that transcends technical and economic objectives such as productivity and efficiency, Industry 5.0 seeks to promote other purposes that are also essential for the future of the sector, i.e., human well-being, sustainability, and resilience. Industry 5.0 is a model of the next level of industrialization characterized by the return of manpower to factories, distributed production, intelligent supply chains, and hyper customization, all aimed to deliver a tailored customer experience time after time.

Experiments to be selected should explore how Industry 5.0 and human-centred digitalization can contribute to the flexibility and adaptability of small and medium-sized enterprise (SME) production processes, resulting in more resilient and sustainable systems. The goal is to explain on real use cases the relationship between digital technologies and production system features through progressively more human-centric stages of a digitalized manufacturing system. Experiments should focus on measurable benefits in Industry 5.0 context, such as improving well-being of workers, creating safer workspace, improved ability to adapt to adverse situations with positive results, reducing negative environmental aspects in the entire product life cycle.

Applicants are encouraged to adopt AI REDGIO 5.0 reference architecture (RA) for providing end-to-end solutions. Proposals in this topic shall provide clear business scenarios, reflecting real industry challenges and defining and measuring realistic technical and business KPIs. In this perspective, it is expected that the application experiments provide their own datasets and the commitment of Manufacturing SMEs to define and measure the business benefits from AI REDGIO 5.0 RA.

3. TOPIC 3: TERESA (Technology Regulatory Sandboxes) experiments

In the Industry 5.0 workplace of the future, envisioned by AI REDGIO 5.0, humans and machines are expected to share physical spaces according to the cutting-edge Collaborative Intelligence-driven paradigm, working

not only sequentially but even with close, physical real-time responses from machines/robots to the operators. The AI-driven autonomous systems will efficiently and effectively interact with the human beings, enabling an immersive AI-based human-machine co-working environment. The work has a pivotal role in most adult lives. Therefore, the ethical, regulatory, psychological and societal impacts of the introduction of Industry 5.0 and CI solutions in the workplace must be taken into account: it is paramount to perform experimentations to ensure that both industrial companies and workers benefit from the advantages of a synergistic collaboration between humans and machines and that the workers (and their rights) are put at the center of the factory, moving ahead towards the ethically-sound and human-centered human-machine co-working environment.

In order to promote the data-and-human-oriented SME digital transformation, the AI REDGIO 5.0 Project is extending the AI REGIO Network of Didactic Factories (DFs). In synthesis, an AI REDGIO 5.0 DF is an open testing and experimentation facility which extends the services of a Learning Factory towards the materialization of the EDIH “test before invest” pillar. By providing access to technical expertise and experimentation as well as the possibility to “test before invest”, A Didactic Factory, like an EDIH, helps companies innovating their business or production.

The main goal of Topic 3 proposals is to develop a TEchnology and REgulatory Sandbox (TERESA) experiment, exploiting a DF’s facilities and addressing Human-AI interactions and regulatory and ethical issues. The experiments to be selected under topic 3 must cover one or more of the Topics 1 and 2, following the “humans in the loop” train-explain-sustain paradigm. The TERESA experimentation should have a twofold objective: i) a technical validation of the Human-AI interaction through a DFs, following the test-before-invest paradigm, and ii) a regulatory and ethical validation, involving volunteers and at least a competent authority (such as regulators, supervisors, policy-makers, innovation agencies, Vanguard Initiative representatives, regional or local authorities, etc.). One or more of the following so-called WISE aspects have to be addressed by the TERESA experiment:

- **Well-being, Comfort and Acceptance**, which refer to the impact on mental well-being and self-esteem, frustration, feeling of usefulness, emotional dependence and overconfidence on the machine, human dignity, autonomy and oversight, concerns/willingness in collaborating with a machine;
- **Inclusion and special categories of workers**, which refers to the effects on older workers, effects on novices, effects on workers with cognitive or physical disabilities/impairment, social isolation, risk of discrimination/bias;
- **Safety of the worker**, including health and safety of the workers, risks of harm, privacy and other.
- **Ergonomics and improving working conditions**, comprising the impact on stress reduction, fatigue reduction, effects on workers' skills.

NB: If the applicant chooses to conduct the experiment at one of the AI REDGIO 5.0’s DF’s premises, they should indicate it at proposal stage which DF they wish to join. Make sure to include in your budget any foreseen travel costs. The complete list of DFs part of the AI REDGIO 5.0 project can be consulted here:

<https://www.airedgio5-0.eu/didacticfactoriesexperiments>

2.2. Key dates

The key dates of the open call are as follows:

Table 1. Key dates for the AI REDGIO 5.0 first open call

Activity	Dates
Call opening	01/12/2023

Call closing	01/03/2024 – 12:00 CET
Assignment of evaluators	19/02/2024-08/03/2024
Evaluation of proposals	11/03/2024 – 14/04/2024
Communication of results	15/04/2024-22/04/2024
Sub-grant Agreements	23/04/2024 – 19/05/2024
Execution of experiments	20/05/2024-19/01/2025

2.3. Who can apply?

The AI REDGIO 5.0 open call is addressed to **manufacturing SMEs** eligible for Horizon Europe. Only one proposal will be accepted for each SME.

SMEs: manufacturing SMEs, as defined in the European Commission recommendation 2003/361/EC¹, as published in the Official Journal of the European Union L 124, p. 36 of 20 May 2003.

“The category of micro, small and medium-sized enterprises (SMEs) is made up of enterprises which employ fewer than 250 persons and which have an annual turnover not exceeding EUR 50 million, and/or an annual balance sheet total not exceeding EUR 43 million.” Extract of Article 2 of the annex to Recommendation 2003/361/EC.

2.4. Eligibility criteria

In order to be considered as eligible, applicants must comply with the following:

- All participants must be registered in a EU27 Member State or Horizon Europe Associated Countries².
- Status of all organisations presenting the proposal falls under the categories indicated in section **Who can apply?**

Furthermore, the proposal must:

- Be submitted in English. Proposals submitted in any other language will be excluded.
- Be submitted within the stipulated deadline.
- Be completed and follow the template provided.

3. AI REDGIO 5.0 experiments

¹ <https://eur-lex.europa.eu/legal-content/EN/TXT/?uri=CELEX:32003H0361>

² https://ec.europa.eu/info/funding-tenders/opportunities/docs/2021-2027/common/guidance/list-3rd-country-participation_horizon-auratom_en.pdf

This section presents the mandatory tasks to be carried out by the experiments, the deliverables, the expected timeline, the budget and the payment schedule. The expected duration of AI REDGIO 5.0 experiments is of 8 months.

3.1. Experiment tasks

The selected experiments will have to participate in various mandatory activities:

- **Kick-off meeting of the AI REDGIO 5.0 selected experiments:** the selected experiments will participate in a kick-off meeting organised by AI REDGIO 5.0 with the aim of presenting their experiment in terms of general overview, objectives, participants and expected outcomes.
- **Participation in at least 1 individual follow-up meeting with AI REDGIO 5.0 monitoring team:** the monitoring team will control the execution of the experiments through the organisation of a follow-up meeting at month 4. This meeting will allow the assessment of the advancement made by each experiment and will enable to solve any problems that may appear during the first months of execution.
- **Preparation and delivery of the established deliverables (see section 3.2):** the experiments will have to develop a set of deliverables defined in section 3.2 that will serve to assess the execution of the experiments and the outcomes achieved.
- **KPIs:** The pilot experiments will define a set of KPIs in order to monitor, and finally assess, their experiment.
- **Dissemination of the experiments:** the selected experiments will carry out dissemination and exploitation activities during and after the execution of the experiments.

3.2. Experiment deliverables

- **D1. Technical Specifications, Architecture and/or Data Pipelines**

This deliverable will detail the technical specifications of the pilot as well as the architecture and/or data pipelines. It will describe the system requirements, design decisions, components used in the experiments, as well as the architecture mapping and the phases of the experiment. This deliverable will also include the implementation of the proposed pipeline.
- **D2. Experiment implementation, Integration and Testing**

This deliverable will explain in detail the phases of implementation, integration and testing of the experiment. It will contain a timeline of the experiment as well as a detailed description of the activities performed during the experiment. This deliverable also considers the definition of the barriers and difficulties faced during the implementation, integration and testing stages and the respective contingency plan.
- **D3. Experimentation and Measurement of technical-business KPIs**

The pilot experiments will define a set of technical and business KPIs that the experiment is intended to address. These KPIs will reflect the outcomes of the pilot experiment solution and enable a deep analysis.
- **D4. Dissemination and exploitation + communication material**

This deliverable will define the dissemination and exploitation actions carried out by the pilot experiment participants during the execution of the experiment, as well as the expected activities for the coming months. The impact generated by these dissemination activities will be also considered within this deliverable. Furthermore, the communication material used for these activities (such as posters, infographics, brochures, videos, etc.) will be also presented.



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AI  REDGIO 5.0

3.3. Experiment timeline

The experiment timeline will be the following:

Table 2. Expected timeline of experiments

	M1	M2	M3	M4	M5	M6	M7	M8
Milestones	Kick-off			Individual Monitoring Meeting				
Deliverables				D1. Technical Specifications, Architecture and/or Data Pipelines D2. Experiment implementation, Integration and Testing				D3. Experimentation and Measurement of technical-business KPIs D4. Dissemination and exploitation + communication material

The **follow-up meetings**, scheduled for month 4 of the experiment, will be organised in order to enable the project coordinators to monitor the progress and solve any issues occurred during the implementation of the pilot experiment.

3.4. Budget and financial support

This Open Call has a budget of EUR 600.000,00 to fund 10 experiments. The maximum amount of FSTP allowed per experiment is **up to EUR 60.000,00**.

Budget considerations:

- **Funding rate:** the funding rate follows Horizon Europe rules, the funding rate applicability for the selected SMEs or for-profit entities is 60% of eligible costs, while for non-profit organisations it is 100% of eligible costs.

3.5. Structure of the budget

AI REDGIO 5.0 first Open Call will follow the Lump Sum cost reporting system. Lump sum funding provides considerable simplification potential, as it removes all obligations on cost reporting and the need for timesheets, simplifying a big part of the administrative burden on beneficiaries.

Proposers have to include the presentation of the budget requested in the proposal. The costs are exclusively destined to the execution of the pilot experiment and the development of the deliverables defined under section 3.2 Experiment deliverables.

3.6. Payments

The payment for the experiments will be linked to the accomplishment and approval by AI REDGIO 5.0 consortium of the defined KPIs and deliverables. The payment of the requested funding will be made in two instalments:

Table 3. Payment procedure

Payment	Description	Related deliverables	%
A pre-financing payment	At the signature of the sub-grant agreement.	Sub-grant agreement	50%

<p>A second and final payment</p>	<p>At the end of the experiment, when the defined KPIs and deliverables are accomplished and approved by AI REDGIO 5.0 responsible partner.</p>	<p>D1. Technical Specifications, Architecture and/or Data Pipelines D2. Experiment implementation, Integration and Testing D3. Experimentation and Measurement of technical-business KPIs D4. Dissemination and exploitation + communication material</p>	<p>50%</p>
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3.7. What is in AI REDGIO 5.0 for the participants?

The selected experiments will benefit from:

- Financial support of **up to: EUR 60.000 per experiment;**
- Taking advantage of existing AI in the Edge components and AI at the Edge expertise for manufacturing already available in AI REDGIO 5.0 consortium;
- Extend and improve the AI REDGIO 5.0 catalogue of advanced AI at the Edge components and tools;
- Participate in innovative experiments in the domain of AI at the Edge for Manufacturing.

4. Experiment design, submission and evaluation

4.1. Overall process

Experiments will undergo the following stages:

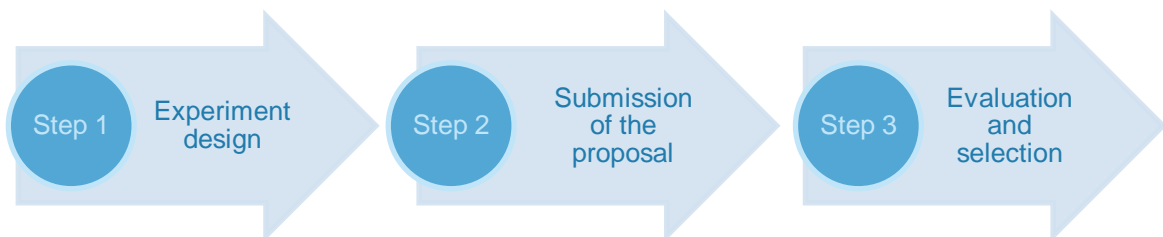


Figure 1. Open Call participation procedure

The steps are briefly described in the sub-sections below.

4.2. Step 1: Experiment design

Applicants have to prepare a description of the project proposal, as well as a technical description with further details concerning the implementation of the project and the exploitation of results.

The proposal is submitted in a single stage through the Evaluation Management System (EMS) online platform: <https://airedgio.ems-carsa.com/>. The template can be downloaded from the EMS platform. Applicants are asked to carefully read and follow the instructions provided in the proposal template.

The proposal template details what is expected from the applicants in each section. Please note that each section of the proposal corresponds to an evaluation criterion.

The proposal template includes the following sections:

Table 4. Structure of the proposal

Section	Sub-sections
1) Excellence (3 pages)	1.1 Objectives of the experiment 1.2 Experiment overview 1.3 Scientific and Technological Excellence
2) Impact (3 pages)	2.1 Expected impact on the SME 2.2 Dissemination and exploitation plan
3) Implementation (4 pages)	3.1 Work Plan 3.2 Budget of the experiment 3.3 Participant presentation

Further detail on what is expected in each sub-section is indicated in the proposal template.

In addition to the proposal template, applicants are welcome to support their proposal by providing the following annexes on the platform:

- **Additional documentation to support the proposal experiment** (not mandatory)

4.3. Step 2: Submission of the proposal

The proposals are submitted digitally, by the SME, in a single-stage through the Evaluation Management System (EMS). proposals prepared according to the instructions provided, shall be submitted electronically through the EMS platform. Applicants should follow the steps starting from the AI REDGIO 5.0 EMS website <https://airedgio.ems-carsa.com/>.

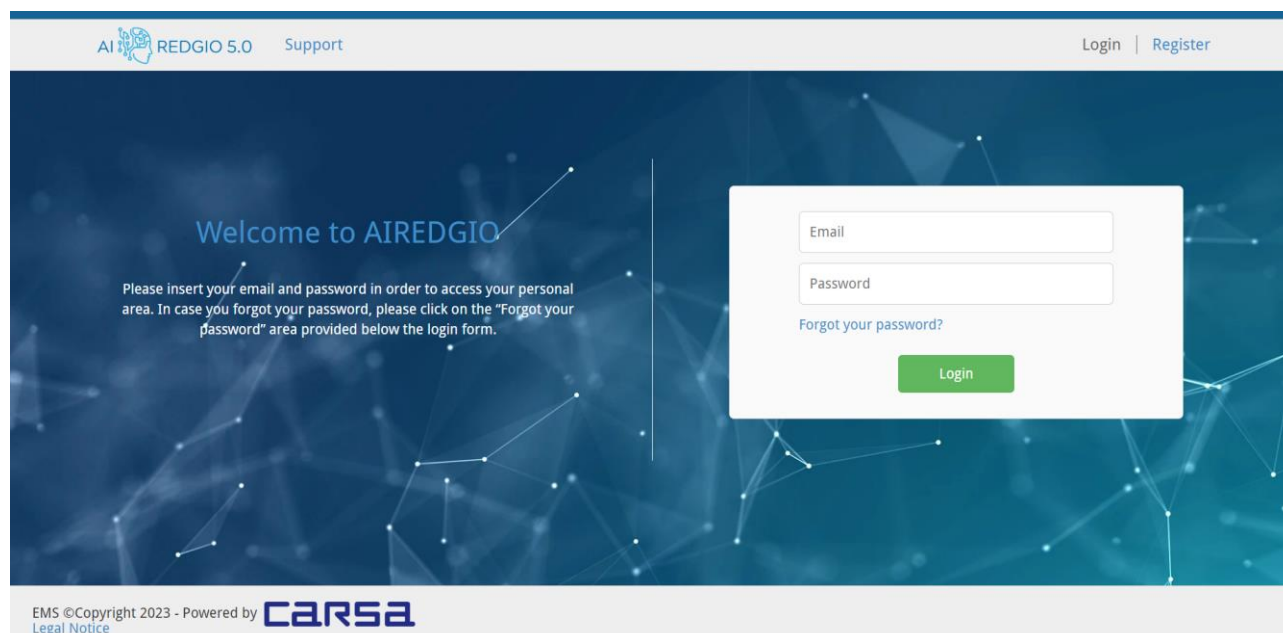


Figure 2. Home page of EMS platform for AI REDGIO 5.0 Open Calls

Once the proposal is completed, click "Submit". Applicants will have the chance to submit new versions of their proposal as many times as they wish before the call closure. Only the last version submitted before the deadline will be considered in the evaluation.

The responsibility for a successful and timely reception remains with the applicants. Proposals arriving after the closing date and time will not be taken into consideration.

An acknowledgement of receipt will be sent out via email to all successfully submitted proposals, as soon as possible after the closure of the call. However, this receipt will not be proof that the proposal is eligible for evaluation.

4.4. Step 3: Evaluation and selection

The proposals received will go through the following evaluation process detailed below.

4.4.1. Eligibility check

All proposals received go through the automatic eligibility check. The eligibility check ensures that the criteria presented in section 2.4 are met. Criteria are the following:

- All participants must be registered in a EU27 Member State or Horizon Europe Associated Countries³.
- Status of all organisations presenting the proposal falls under the categories indicated in section **Who can apply?**

Furthermore, the proposal must:

- Be submitted in English. Proposals submitted in any other language will be excluded.
- Be submitted within the stipulated deadline.
- Be completed and follow the template provided.

4.4.2. Evaluation

The best proposals of innovative experiments in the domain of AI for Manufacturing complying with the following criteria will be awarded for financial support:

- a) The relevance to AI REDGIO 5.0's objectives and scope including complementarity to the project's technical areas of specialization and manufacturing domains of the AI REDGIO 5.0 Champions.
- b) Its impact to the AI sector needs, the development of AI on the Edge in Europe, AI REDGIO 5.0 ecosystem, and AI REDGIO 5.0's goals and objectives.
- c) The ability of the proposer to implement the experiments and/or integrate its new services, on the basis of the team and company profile, background infrastructures, experience, but also based on its proposed implementation plan.
- d) The ability of the proposed solutions to interface with the outside world (other data sources, external AI pipelines or visualization tools) through open and standard APIs (e.g., gRPC⁴) to enable interoperability with the ever-growing catalogue of AI REDGIO AI on the Edge solutions.

The following table presents the detailed description for each evaluation criteria.

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

⁴ <https://grpc.io/>

Table 5. Evaluation criteria

Evaluation criteria	Description
1) Excellence	<ul style="list-style-type: none"> • Define clear and ambitious objectives. • Demonstrate alignment with AI REDGIO 5.0 objectives. • Address the sectors and technologies of AI REDGIO 5.0 open call. • Develop a sound and ambitious experiment consisting on an end-to-end solution, starting from connecting data sources, till “action handling” (visualization, robot arm, etc.). • Provide a clear description of the challenge the experiment plans to overcome. • Present a draft of the architecture based on the StreamPipes orchestration and further connections with the outside world (open-source API based on existing standards like gRPC). • Demonstrate innovation capacity to improve the current processes, products or services.
2) Impact	<ul style="list-style-type: none"> • Contribute to increase the digitalisation level of the SME. • Demonstrate clear technological, economic and commercial impacts. • Set clear and realistic KPIs. • Develop an appropriate dissemination and exploitation plan.
3) Implementation	<ul style="list-style-type: none"> • Develop a coherent and clear work plan with an appropriate assessment of risks, together with a clear assignation of efforts and resources to each work package. • Have the required capacity to carry out the experiment (budget). • Demonstrate capacity to carry out the experiment (personnel, infrastructure, etc.).

Each proposal will be evaluated by two evaluators against the criteria outlined above. Each evaluator will record his/her individual opinion on each proposal using the evaluation form available in the EMS platform. They will then communicate in order to reach consensus on the quality of each proposal. The result of that agreement (comments and scores) will be reflected on the Evaluation Summary Report (ESR). Only proposals with scores above thresholds for each criterion, as indicated below, will be ranked for funding. Once ESRs of all proposals are completed, AI REDGIO 5.0 partners will have a meeting in order to rank all the proposals and create a shortlist of maximum 10 proposals, which will finally be proposed to receive funding. The rest of the approved proposals will be included in a reserve list.

The evaluation will be carried out by experts who are completely independent from the applicants. These experts will be individuals with experience and knowledge in the fields of digital technologies, with a special focus on Artificial Intelligence and the implementation of digital strategies.

When preparing the ranking, if two or more proposals are tied with the same overall score, priority will be given as illustrated in table below. The thresholds and priorities given to each criterion are the following:

Table 6. Criteria thresholds and priority

Criterion	Threshold	Priority (in case of ex-aequo)
Excellence	3	2
Impact	4	1
Implementation	3	3

The following table details the evaluation scores for each criterion:

Table 7. Evaluation scores

Score	Description
0. Fail	The proposal fully fails to address the criterion under examination or cannot be judged due to missing or incomplete information.
1. Poor	The criterion is addressed in an inadequate manner, or there are serious inherent weaknesses that will impede success.
2. Fair	While the proposal broadly addresses the criterion, there are significant weaknesses that would hinder the project implementation.
3. Good	The proposal addresses the criterion well, although improvements would be necessary and various details are missing on implementation.
4 Very Good	The proposal addresses the criterion very well, although certain improvements are still possible and some particular details are missing on implementation.
5. Excellent	The proposal successfully addresses all relevant aspects of the criterion in question. Any shortcomings are minor.

All activities proposed should respect fundamental ethical principles, including those reflected in the Charter of Fundamental Rights of the European Union. If any issues with these fundamental ethical principles are identified while the proposal is being evaluated the initiative will take any measures deemed appropriate in order to deal with the situation.

4.4.3. Evaluators

Each proposal will be **evaluated by two experts**, being **one internal expert** and **one expert external from the consortium partners**. Each proposal will be evaluated according to the established criteria and will be given a score which will be used to select the experiments.

The names and CVs of the evaluators are communicated to the European Commission.

These evaluators will sign a declaration of confidentiality and a non-conflict declaration.

4.4.4. Ranking of proposals and final selection

The result of this evaluation is a ranking of the proposals according to the obtained scores. The final selection will ensure diversity in terms of sectors and geographical coverage.

Once the evaluation process is completed for all proposals, applicants, whether successful or unsuccessful, will receive a notice on the outcome of the evaluation and their Evaluation Summary Report.



5. Support available for applicants

In addition to the present Guide for Applicants, the following tools are available to support applicants:

- **Frequently Asked Questions**

A Frequently Asked Questions document is available on the website. The document will be periodically updated to reflect the questions received.

- **Helpdesk**

Applicants may contact the AI REDGIO 5.0 helpdesk should they wish to receive further information on the Call for Proposal content and conditions through the EMS platform.

- **Official AI REDGIO 5.0 website page dedicated to the open call**

A dedicated webpage is available on the official AI REDGIO 5.0 website to check all the related information and to download all the documents useful for the application. The webpage is linked with the EMS platform to facilitate the connection between the tool and the uploading of the application.