

PCP Competition: Supporting Independent Living for the Elderly through Robotics (SILVER)

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Authority: Technology Strategy Board (UK)

The TSB is the Authority that is executing the PCP on behalf and in the name of the group of SILVER contracting authorities listed on this page.

Group of SILVER contracting authorities

City of Eindhoven (the Netherlands)
City of Odense (Denmark)
City of Oulu (Finland)
City of Stockport (UK)
City of Vantaa (Finland)
City of Västerås (Sweden)
Region of Southern Denmark (Denmark)

In cooperation with

AALTO (Finland)
BRAINPORT (the Netherlands)
Forum Virium Helsinki (Finland)
Netherlands Enterprise Agency on behalf of the Ministry of Health, Welfare and Sports (the Netherlands)
Technology Strategy Board (UK)
VINNOVA (Sweden)

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SILVER_12. Call for bids for Phase 2

This Call for Bids concerns only Phase 2. Eligible tenderers are only those that successfully completed Phase 1. This Call for Bids for Phase 2 should be read in conjunction with other documents associated with this SILVER PCP. These documents will be available on the secure website.

In this PCP the **Technology Strategy Board (UK)** will act as the Authority on behalf and in the name of the group of contracting authorities for a cross-border group of SILVER contracting authorities.

Summary of the PCP SILVER Challenge

Interested legal entities are invited to tender for development project contracts in this PCP with the aim to develop new solutions addressing the lack of new innovative robotics solutions to make elderly people more independent from professional homecare, as outlined in the SILVER_02 Challenge Brief:

“The main goal of the SILVER challenge is to develop new innovative robotic solutions that target assisting the elderly and those caring for them with personal activities of daily living. These solutions are not yet on the market, but can be developed and tested within the SILVER PCP period of 2-3 years. These robotics solutions will be able to take over all or part of the work of care givers. “

The Challenge Brief contains information on the SILVER challenge and expected outcomes of the projects.

If a tender is submitted by a consortium that does not in itself constitute a legal entity, all consortia members shall sign the tender, making them jointly and severally liable.

When tendering for this call, bear in mind that the tendered price should reflect the fact that the intellectual property rights stay with the contractor as provided for in the contract.

Time Frame, Impact and Budget

Tenderers should aim at a market introduction of their new solution a maximum of 2-4 years after the end of the PCP. In 2020 the new solutions should make it possible to care for 10% more people with the same amount of staff. In total 2,150,000 Euros is reserved for the PCP contracts, of which 209,648 Euros was spent on Phase 1 projects.

Invitation to submit a bid for Phase 2

You are hereby invited to submit a bid for Services for Phase 2 – Prototyping. This invitation is send to all [insert number] contractors that have completed Phase 1 successfully.

This Invitation should be read in conjunction with other documents associated with the SILVER PCP. All terms used herein shall have the meaning ascribed to them in these documents, unless otherwise is evident from the context.

This invitation and your bid are made in accordance with and subject to the preceding SILVER_01 Invitation to Tender and the SILVER_06 Framework. All requirements and conditions of the Invitation to Tender and the Framework Agreement shall apply to your bid for Phase 2 as well.

Phase 2 – Prototyping

The SILVER PCP framework agreement covers three Phases: *Solution Exploration, Prototyping, and Test Series*. This Call for Bids concerns only Phase 2 – Prototyping.

Phase 2 is intended to develop and evaluate prototypes from the more promising concepts in Phase 1. In general a prototype is an early sample, model or release of a product built to test a concept or process or to act as an object to be replicated or learned from. A prototype is supposed to guide and improve the design. It is important to create physical models as soon as possible and work with end users to interact with the prototypes and provide product developers with feedback that will allow them to improve the design through iterative changes and retesting of their prototypes.

In this context (Phase 2) the term “prototype” more specifically means “user experience prototype”. A user experience prototype invites active human interaction and is primarily used to support user focused research. This type of prototype represents the overall size, proportions, interfaces, and articulation of a promising concept. It allows early assessment of how a potential user interacts with various elements, motions, and actions of a concept which define the initial use scenario and overall user experience.

When not already available, the prototype(s) will be developed during phase 2 as well. Phase 2 is dependent upon successful completion of Phase 1 and contracts will be awarded only to a limited number of selected Phase 1 contractors. Budget will be at a maximum amount of 818,400 euros (including VAT) for a maximum of 4 projects.

The contracts placed for Phase 2 will be for the duration of 12 months and a maximum price of 180,000 euros (excluding VAT). The number of awarded contracts depends on the price of the bids and the required minimum score of the bids.

The contracting authorities will test the solutions coming from the pilots. In Phase 2 all contractors are obliged to have their prototype tested; this will be done by the Health Innovation Centre of Southern Denmark.

Services that are to be provided under Phase 2 and to be covered by the bid are described in the updated version of Section 3 of the Framework Agreement, appended hereto as SILVER_06 Framework Agreement with Updated Call-off Contract Phase 2. The Services for Phase 2 shall be performed in accordance with said Section 3 and with the SILVER Challenge Brief with regard to Phase 2.

The Services with regard to Phase 2 shall be provided and delivered according to the Time Schedule (see ‘Administrative instructions’).



Health Innovation Centre of Southern Denmark is the entry to the health care sector in the Region of Southern Denmark when it comes to innovation, assisted living, telemedicine, and work relating to public-private cooperation. Since 2010 it has developed methods for working with user-involvement in the innovation process. The centre has experts in uncovering end-user needs, development of new ideas. Innovation experts and a total of 1900 square metre of test- and innovation facilities provide the unique opportunity to build and test 1:1 scaled mock-up products, together with companies and end-users like health professionals, elderly, patients and their relatives.

www.syddanksundhedsinnovation.dk/service-menu/english

Testing of prototypes

Testing will be carried out by HICSD in close collaboration with the Contractors together with experts from Health Innovation Centre of Southern Denmark. Every prototype will demand specific requirements from the environment where it will be tested. The environment will be (subject to HICSD's limitations) tailored to these specific demands in close consultation with the Contractors.

The test environment which HICSD will build is a mock-up of a home of the target group. As such it is a "home environment" with the relevant rooms and the relevant functionality needed to test the solutions from a user experience perspective. HICSD will provide a relevant and realistic test environment to test the solutions and to investigate potential for improvement with end users. The mock-up will resemble a standard home of the target group. The Contractors will provide all relevant technology to make their solution function in a home. As such the test set up will reflect a realistic end user scenario with a private home of an elderly person as the frame within which a solution will have to function.

Health Innovation Centre of Southern Denmark offers each Contractor 84 hours + 6hrs buffer of experts for a start-up meeting (incl. preparation), planning and completion of tests and analysis and presentation of results. Costs for building the test-environment are covered by the Health Innovation Centre. The total maximum cost of tailoring the environment may not exceed not exceed 500€ (incl. VAT) per company. Costs for transport of the prototypes are not included.

Testing will be carried out by Health Innovation Centre of Southern Denmark according to the process in the scheme on the following page. Prototypes will be tested on the following aspects:

- Contribution to time savings as outlined by the Contractor in the tender for Phase 2 in relation to the target group and the targeted ADL tasks
- Usability in relation to the experience and capability of the target group
- Safety in relation to CE marking requirements

How the innovation will be tested is decided and agreed with the Contractors in the preliminary meeting when developing the test set-up as indicated in the testing scheme. A more detailed Test plan is added to the Call-off contract for Phase 2.

The call-off contract is awarded under the condition that the parties agree on the detailed test plan. Failure to agree the detailed Test Plan will result in Termination of the agreement as per article 20.4.

Test report

Contractors receive the data from the testing after testing day 2 and agree that the call-off contract is awarded under the condition that these results will be used to write the Test report.

A preliminary Test report will be sent within a month after testing day 2 and will include an analysis of the testing results and recommendations and suggestions for improvement of the



prototype for the next Phase. The contractor will have 14 days to submit comments to be added to the Test Report before the report is finalised and then sent to all the partners in the SILVER consortium.



Primary meeting	Preparation for testing	Test day 1	Test day 2	Expert evaluation	Output
<p>one month before start</p> <p>more about the solution.</p> <p>fy the degree of user ent beforehand.</p> <p>a on the most ate test set-up.</p> <p>s typical usage s for the solution.</p> <p>on how to test the in depth with users.</p>	<p>a) Detailed planning and preparation of test process: Schedules for test days, questionnaire, observation guide, interview guide (users + experts), materials for test days (posters etc).</p> <p>b) Recruitment of users from target group.</p> <p>c) Production of written material (for patient associations etc., detailed invitations for users, permission to use photos, etc.)</p> <p>d) Building of test environment at HICSD.</p> <p>e) Research on how the solution is expected to impact health and plan evaluation with expert.</p> <p>f) In dialogue with expert clarify how to evaluate the solution's impact on health at an early product development state.</p>	<p>April 2015-May 2015</p> <p>Questionnaire or interview before test: Baseline (general challenges, quality of life)</p> <p>Workshop to test solutions according to research questions:</p> <ol style="list-style-type: none"> 1) Independence 2) Quality of life 4) User experience & needs <p>Semi-structured interview afterwards to investigate user experience, to co-create and uncover potential for improvement.</p>	<p>April 2015-May 2015</p> <p>In depth investigation of the solution: User experience, co-creation, improvements.</p> <p>Video observation of how solution functions without assistance/guidance. User is introduced to solution and possibly left alone with the device and asked to carry out specific tasks/actions with the device while being filmed.</p> <p>This day will address research questions:</p> <ol style="list-style-type: none"> 1) Independence 2) Quality of life 4) User experience & needs 	<p>April 2015 – May 2015</p> <p>To address research question:</p> <ol style="list-style-type: none"> 3) Health <p>Evaluation of how the solution impacts health of target group.</p> <p>Demonstrate the solution, evaluate and discuss possibility of improvements (co-creation).</p>	<p>No later than one month after the last testing.</p> <p>A report written by HICSD sent to the Contractors and the Silver Consortium.</p>
<p>2 innovation</p> <p>at least 1 product</p>	<p>HICSD: 2 innovation consultants + 1 construction instructor</p> <p>Company: Make device ready for testing at test site at HICSD.</p>	<p>HICSD: 2 innovation consultants + 1 photographer + 6-8 users from target group + caregiver where appropriate + expert to participate as observer for half a day (physician, medical practitioner, physiotherapist etc)</p> <p>Company: At least one product developer.</p>	<p>HICSD: 1 innovation consultant + 1 person from target group + caregiver where appropriate.</p> <p>Company: No more than one product developer</p>	<p>HICSD: 1 innovation consultant.</p> <p>Company: At least one product developer</p>	<p>HICSD: 2 innovation consultants + 1 video editor + 1 graphic designer</p>
hrs	Total: 35hrs	Total: 18hrs	Total: 5	Total: 4	Total: 14

Phase 3 – Test series

Phase 3 is intended for the original development of a limited volume of first products / services (test series). Phase 3 is dependent upon successful completion of Phase 2 and contracts will be awarded only to a limited number of selected Phase 2 contractors. For this phase, it is anticipated that a budget of 1.080,000 Euros (including VAT) is available for a maximum of 3 projects.

In Phase 3, testing will be done in a real environment. The contracting authorities will test all the in Phase 3 awarded solutions in all the procuring countries. In this way the SILVER consortium can ensure that any locally required differences (e.g. to cope with different languages or local building regulations) can be covered whilst not burdening the pilots early on by having to cope with multiple testing centres. The final decision on testing locations per country and test period will be taken before Phase 3 commences.

The contracts placed for Phase 3 will be for a maximum of 12 months. The number of awarded contracts depends on the budget, the price of the bids and the required minimum score of the bids.

Whether testing in Phase 3 will be done in series or in parallel, may depend on the solutions that will be developed. More information will be given during Phase 2. The budget available for Phase 3 may eventually be higher than mentioned above, depending on how many contracts will be placed in Phase 2.

The payments are firm and fixed and in Euros, i.e. not adjusted for foreign exchange and / or index, or in any other way. All prices **shall** be stated in Euros.

Authority and the group of SILVER contracting authorities

The **Technology Strategy Board** will act as the Authority that carries out the PCP procurement on behalf and in the name of a cross-border group of SILVER contracting authorities with the following parties: City of Eindhoven (the Netherlands), City of Odense (Denmark), City of Oulu (Finland) City of Stockport (UK), City of Vantaa (Finland), City of Västerås (Sweden) and the Region of Southern Denmark.

Administrative instructions

Tenderers whose bids do not comply with the administrative instructions detailed in the Guidance on completing the SILVER_14 Bid form Phase 2 will be excluded from further participation in the PCP.

The Authority will check compliance of use of correct font size and use of English. As well as that bids do not exceed the maximum price of 180,000 euros (excluding VAT). And completion of all mandatory fields, including that the declaration tick box has been checked which the tenderer has used to certify compliance with the framework agreement, minimum requirements and exclusion criteria.

Bid submission

All bids shall be made using the SILVER_14 Bid Form. The link to the tender documents will be provided by the TSB by e-mail. Tenderers are strongly advised to read the SILVER_13 Guidance Phase 2 before completing the SILVER_14 Bid Form Phase 2.



Tenderers shall use their assigned reference number and bids shall have been received at no later than the deadline for bids at 13.00 CEST, see next section “Time schedule for Phase 2 of the SILVER PCP competition”. Bids received after the deadline for Bids will not be evaluated.

Please do not send completed bids by post or any other means other than as directed.

Price

Bid prices for the assessment **shall** be stated in euros currency, exclusive of VAT. Duties, custom fees, taxes or other charges, if any, **shall** be included in the bid price including VAT.

Time schedule for Phase 2 of the SILVER PCP competition

<i>Date</i>	<i>Activity</i>
15 April 2014	End report Phase 1 deadline
8 May 2014	Deadline for questions or requests for clarification concerning this Call for Bids
15 May 2014 13.00 CEST	Deadline Bids Phase 2
30 May 2014	Meeting Decision Panel
June 2014	Contracts Phase 2 signed

Preliminary time schedule after contracting PCP Phase 2

<i>Date</i>	<i>Activity</i>
May 2015	Testing Phase 2 complete
June 2015	Final test report sent to Contractors and SILVER consortium
July 2015	End report Phase 2 deadline
	Deadline Bids Phase 3
	Contracts Phase 3 sent
2016	End report Phase 3 deadline

The Authority reserves the right to adjust the time schedule, if necessary. This will be communicated timely with tenderers.

Communication and questions

When the tender period opens the SILVER_15 Questions and Answers Phase 2 document will be available on the SILVER website.

A contact point has been set up to answer questions from tenderers that are not covered in this Q&A, or need elaboration. All questions concerning the PCP challenge, the scope and the tender process should be addressed in writing to the contact point:

- E-mail: competitions@silverpcp.eu

Questions or requests for clarification concerning this Call for Bids must have been received by the above contact point not later than seven days prior to the deadline for Bids for Phase 2. After this date, no further dialogue will be entered into. Please quote the bid reference when contacting the contact point to help them answer the query.

A summation of all questions and answers addressed to the contact point will be distributed to all tenderers who have received a Call for Bid for Phase 2 via the SILVER website. The identity of the questioner will not be disclosed.

For technical assistance please call

- Telephone: +44 (0)300 321 4357

Validity of bids

Bids shall remain valid up to and including 90 days after the deadline for Bids.

Disclaimer

The Authority assumes no obligation, whatsoever, to compensate or indemnify the tenderers for any expense or loss they may incur in the preparation of their bids (except as may follow from mandatory provisions of law). Furthermore, the Authority reserves the right to cancel the procurement e.g. if tender prices exceed allocated budgets of the authority or if prices are clearly disproportionate.

Conformance to Contract for Phase 2

An agreement will be entered into only by means of a written contract, signed by both parties.

By submitting a bid, the tenderer accepts to be bound by the undertakings and conditions of the SILVER_06 Framework Agreement with Updated Call-off Contract Phase 2 (sections 3,4,5 of the Framework Agreement).

The bid may not contain any reservation in relation to the conditions of the Contract for Phase 2. Bids shall be based on the conditions contained in the Contract for Phase 2 and the SILVER_06 Framework Agreement.

The payments are firm and fixed and in Euros, i.e. not adjusted for foreign exchange and / or index, or in any other way. All prices **shall** be stated in Euros.

Subcontractors

The tenderer shall in his bid state which parts of the scope of the procurement contract, if any, he intends to subcontract other suppliers or contractors for.

A tenderer that wishes to rely on the resources of any subcontractor for the fulfilment of the requirements for participation in the SILVER PCP (and, where, applicable, an awarded contract), should, upon the request of the Authority, in a satisfactory manner demonstrate that these resources will be available to him. One way of demonstrating this is to submit a written commitment from such subcontractor showing that the resources of the subcontractor will be at the tenderer's disposal for the full duration of the contract.



If the tenderer needs to change subcontractors, these new partners will have to prove that they have at least the same competences as the subcontractors or partners they will replace and that they comply with all the other contractual conditions, rights and obligations that are in the framework agreement and specific contracts: e.g. complying with the place of performance conditions, respecting the same IPR conditions and the binding unit prices.

Exclusion criteria

A tenderer will be excluded from further participation in the SILVER PCP if it or any subcontractor on whose resources it relies upon in this procurement:

1. Is bankrupt or is being wound up, is under compulsory administration or is the subject of a composition or has indefinitely stopped its payments or is subject to a prohibition on conducting business,
2. Is the subject of proceedings for a declaration of bankruptcy, for an order for compulsory winding up or administration by the court or composition or any other similar proceedings,
3. Has been convicted by a judgment which has the force of res judicata for an offence relating to professional practice,
4. Has been guilty of grave professional misconduct and the procuring agencies can prove this, or
5. Has not fulfilled its obligations relating to social insurance charges or tax in its own country.
6. In some material respect has failed to provide information requested or provided incorrect information required pursuant to this Call for Bids document.

Tenderers shall explicitly assure that they are not subject to any of the exclusion criteria 1-5 above. Please check the box in the declaration in the SILVER_14 Bid Form.

If the Authority becomes aware that a tenderer, or a representative of the tenderer, or subcontractor, under a judgment that has entered into final legal force has been sentenced for a criminal offence listed below, such tenderer will be excluded from the PCP:

- Criminal offences referred to in Article 2 of Council Framework Decision 2008/841/JHA of 24 October 2008 on combating organized crime.
- Corruption as defined in Article 3 of Council Act of 26 May 1997 preparation on the basis of Article K.3.2 c Treaty on European Union, the Convention on the fight against corruption involving officials of the European Communities or officials of Member States of, and Article 3.1 Council Joint Action 98/742/JHA of 22 December 1998 adopted by the Council on the basis of Article K.3 of the Treaty on European Union, on corruption in the private sector.
- Fraud within the meaning of Article 1 of the Convention drawn up on the basis of Article K.3 of the Treaty on European Union for the Protection of the Communities' financial interests.
- Money laundering as defined in Article 1 of Council Directive 91/308/EEC of 10 June 1991 on measures to prevent the financial system for money laundering, amended by European Parliament and Council Directive 2001/97/EC.



Minimum requirements

The Authority requires that the bids meet all the minimum requirements as listed below. If a bid doesn't meet one or more of these requirements, it will be excluded from this PCP.

1. R&D services

This procurement is carried out under the explicit exemption for R&D services under article 16(f) of the EU public procurement directive 2004/18/EC. Tenderers are asked to observe that the object of the procurement thus is restricted to cover research and development services (basic research, applied research, and experimental development), and not products or other supplies, or commercial development activities. Tenderers are therefore asked to observe that their price offer only includes items that are inseparable from and indispensable to deliver the R&D service that is purchased through the PCP contract.

Please see the section on 'price' in the Bid form for more information on items that can be included in the price offer in addition to the labour price for executing the R&D activities needed to address the PCP challenge (e.g. the price of equipment needed to develop the prototypes or test products, the price for installing such prototype or test equipment on the procurer's premises for the duration of the test phase, the price of travel and accommodation to test sites). Please note that contracts providing more than only services are only still considered a public service contract if the value of the services (in this case the labour price for executing the R&D activities needed to address the PCP challenge) exceeds that of the products covered by the contract (e.g. equipment needed to perform the R&D service as explained above). For further examples of R&D services, please see the *Frascati Manual, Proposed Standard Practice for Surveys on research and Experimental Development* (OECD, latest edition 2002).

It is an absolute requirement that the services offered by the tenderer are within the scope of the above definition of R&D services. The tender shall contain clear information about the tenderer's intended allocation of monies paid by the Authority, in order to allow control of this requirement being fulfilled (that more than 50% of the contract value is attributable directly and exclusively to legitimate R&D services). The tenderer accepts to provide additional such information upon request from the Authority, whether during the procurement period or during the contractual period. This requirement and these obligations on the part of the tenderer apply also, where applicable, for Phase 2 and Phase 3.

Possible other public financing

Tenderers are requested to declare other sources of public financing received in areas of work related to the scope of the SILVER PCP. In case tenderers have received or are receiving public financing that is subject to the State aid rules, offers shall be excluded in case award of a PCP contract would result in double public financing or accumulation of different types of public financing that is not permitted by the EU State aid rules.

2. Place of performance of R&D services

- For Phase 2 at least 70% of the R&D services shall according to the contract be performed within EU Member States, or a country or a country that is associated to FP7¹.
 - For Phase 3 at least 80% of the R&D services shall according to the contract be performed within EU Member States, or a country or a country that is associated to FP7.
- The tenderer shall confirm that this contractual requirement can be honoured and fulfilled.

¹ see latest list of FP7 associated countries on http://cordis.europa.eu/fp7/who_en.html



3. Compliance with national requirements

All research, developments and tests undertaken during Phase 2 and 3 must be compliant with national requirements regarding, inter alia, privacy, safety, ethics, healthcare and any other potentially applicable (due to the specifics of the SILVER project) regulation in place in the countries of the group of SILVER contracting authorities (Denmark, Finland, Sweden, the Netherlands and UK). The tenderer shall confirm that this contractual requirement can be honoured and fulfilled.

Each of the national partners has national guidance relating to standards and safety. Below are the links to the relevant national partner websites and the information contained within them. In addition where relevant and or available there are also links for national guidance around protection and any of relevant sources of national guidance on healthcare regulation. Local offices of the Enterprise Europe Network (een.ec.europa.eu) can be of help as well. Ethic guidelines are contained within the Project Silver Ethics Paper.

In all SILVER countries and other EU countries, there are applicable regulations, standards and directives e.g. for the CE marking (http://ec.europa.eu/enterprise/policies/single-market-goods/cemarking/index_en.htm), the medical devices standards (http://ec.europa.eu/enterprise/policies/europeanstandards/harmonised-standards/medical-devices/index_en.htm) etc. Depending on the actual product and its use, one or more regulations, standards and directives might be applicable.

Denmark

ec.europa.eu/enterprise/policies/single-market-goods/cemarking/downloads/index_en.htm
www.datatilsynet.dk/english/the-act-on-processing-of-personal-data/the-act-on-processing-of-personal-data-in-brief/

Finland:

www.tukes.fi/en/branches/consumer-safety/CE-marking
www.tietosuoja.fi/1560.htm
www.vtt.fi/liitetiedostot/all_clusters/mdd_brochure.pdf

The Netherlands:

www.dutchdpa.nl/Pages/en_ind_wetten_wbp.aspx
www.rvo.nl/onderwerpen/hoi/wet-en-regelgeving/eu-wetgeving/ce-markering
www.igz.nl/onderwerpen/medische_technologie/ict_in_de_zorg/
www.igz.nl/onderwerpen/medische_technologie/medische_hulpmiddelen/aanmeldingsprocedures/

Sweden

www.sp.se/en/units/certification/product/ce_mark/Sidor/default.aspx
www.lakemedelsverket.se/english/product/Medical-devices/
www.datainspektionen.se/in-english/legislation/the-personal-data-act/

UK:

www.gov.uk/ce-marking
www.nres.nhs.uk/applications/guidance/?EntryId62=66940

4. Usable in the participating countries

The solutions must be usable in the countries of the Authority and the group of SILVER contracting authorities, i.e. Denmark, Finland, the Netherlands, Sweden and the UK and preferably all over the EU. And, if relevant, the solutions can easily be modified to communicate with local customer-information systems.



5. Robotics solution

It is an absolute requirement that the tenderer proposes an R&D service that results in a solution that meets the requirements, as mentioned in the brief. This solution must combine different technologies into a single system to deliver a robotic support for assisting elderly with personal activities of daily living (p-ADL) tasks as mentioned in the SILVER_02 Challenge Brief, in order to assist independent living of the elderly.

Pay attention to third party IPR and open source issues because since that is part of the contract, see article 17.5 of the Silver_06 Framework agreement.

Excluded are bids focussing solely on development of basic robotics components; communications tools and solutions simply interacting through a display or alerting the outer world on certain conditions.

6. Ethical aspects

It is an absolute requirement that the tenderer adheres to the following ethical requirements with his proposed solution.

Informed consent

Collection of personal or health related data should be avoided at all times. However, the tenderer may collect data on care receivers' satisfaction, by having them answer a questionnaire. The questionnaire must include the elderly giving their informed consent to participating in the study.

All care givers and receivers must participate on a voluntary basis and will be informed of the research, participation, data security and disclosure procedures. Should collection of data require governmental approval, the tenderer will ensure that the necessary steps are taken, and the required approvals are granted, before the data collection is started.

Furthermore the tenderer will ensure that the data collection and study fully complies with the ethical guidelines contained within each National body Ethics Committee. The links for these are listed within the Project Silver Ethics Paper.

Data protection issues

Tenderers collecting possible sensitive material or data will be required to sign non-disclosure agreements in Phase 2 and Phase 3.

Ethical advisory board

If during the lifetime of the call, end users involved in testing actually have to give their consent or where it is necessary that their personal data will be collected and/or tracked or where observation of people will be involved this must immediately be raised with the Ethics Review Board and the procurers by the selected industry partner. These will be reviewed and concluded on prior to the commencement of Phase 3.

An ethical advisory board will include external input and will provide guidance on these ethical issues in a timely manner. In addition ethical responsibility will be taken by the procurers doing the testing to ensure that this complies with both national and EU level requirements in this area. It will remain the responsibility of the tenderers to comply with these requirements.



Furthermore each tenderer will complete an Ethics Issues Table with their Bid (<ftp://ftp.cordis.europa.eu/pub/fp7/docs/ethical-issues-table-annex4.pdf>).

From one Phase to the next Phase

From Phase 1 to Phase 2

Upon completion of Phase 1, the Authority will, based on the End of Phase Report for Phase 1, submitted by the Contractor within 14 days after the Completion Date of Phase 1, make a Call for Bids among those that successfully completed Phase 1 to perform the Services within the scope of Phase 2.

Successful completion of a phase is assessed on the basis of the End of Phase Report in terms of satisfactory completion time and quality of the work, as well as technical and commercial feasibility of the innovative solution to address the PCP challenge against the solution requirements outlined in the SILVER_02 Challenge brief, the SILVER_01 Invitation to Tender and the tender of the Contractor. The assessment of successful completion of Phase 1 is carried out by the Authority or persons appointed by it and the group of SILVER Contracting Authorities.

The Bid for Phase 2 shall build on the solution designed in Phase 1. The same shall apply *mutatis mutandis* for Phase 3. When assessing bids, the Decision Panel may take into consideration the results of the previous phase and the assessment of the End of Phase report. Tenderers are advised that successful completing of a Phase does not mean that the decision panel considers the proposed solution to be promising for the next Phase.

Assessment of the preceding phase does not in any way prejudice the assessment of bids for the next phase.

From Phase 2 to Phase 3

Upon completion of Phase 2, the Authority will, based on [the Test report from HICSD](#) and the End of Phase Report for Phase 2, submitted by the Contractor within 14 days after the Completion Date of Phase 2, make a Call for Bids among those that successfully completed Phase 2 to perform the Services within the scope of Phase 3.

Successful completion of a Phase is assessed on the basis of [the Test report from HICSD](#) and the End of Phase Report in terms of satisfactory completion time and quality of the work, as well as technical and commercial feasibility of the innovative solution to address the PCP challenge against the solution requirements outlined in the SILVER_02 Challenge brief, the SILVER_12 Call for Bids Phase 2 and the tender of the Contractor. The assessment of successful completion of a Phase is carried out by the Authority representative or persons appointed by it.

The Bid for Phase 3 shall build on the solution designed in Phase 2. In the bid the tenderer will address any and all of the recommendations for improvement given in the Test report from Phase 2. Tenderers are advised that successful completing of a Phase does not mean that the decision panel considers the proposed solution to be promising for the next Phase.

Assessment of the preceding phase does not in any way prejudice the assessment of bids for the next phase.

Assessment of bids Phase 2

The Bid forms will be evaluated by the assessors if the requirements in the administrative instructions are met.

If the Authority becomes aware at any time that a tenderer, or a representative of the tenderer, or a subcontractor is subject to the exclusion criteria or does not meet all minimum requirements or administrative instructions this tenderer will be excluded.

Once the Bid forms are sent for assessment, the independent experts will also confirm that the information is included in the Bid form from the tenderers to support the minimum requirements being met. If one of the assessors believes any information is missing, he will mark the assessment form as a NO. This will then be discussed further at the Decision Panel, where by unanimity a final decision will be made, whether the minimum requirements have been met. Hence it is the responsibility of the tenderer to provide all the relevant information in his bid to confirm these minimum requirements are met.

Bids will be initially reviewed by five independent experts with knowledge of elderly care, robotics and/or general business knowledge. Each bid will be assessed by at least 2 experts with knowledge of elderly care and at least 1 expert with knowledge of robotics. Due to constraints to time and resources, all bids may not be assessed by all experts. Based on the experts' individual assessments, a preliminary ranking of the bids will be made.

This preliminary ranking will subsequently be inspected and reviewed by a decision panel consisting of at least two independent experts, City of Eindhoven (the Netherlands), City of Odense (Denmark) / Region of Southern Denmark (Denmark), City of Oulu / City of Vantaa (Finland), City of Västerås (Sweden), City of Stockport (UK) or persons assigned by these parties in order to represent all in SILVER participating countries.

The decision panel will monitor and safeguard that the assessment of all bids is consistent and equal, and will have the authority to adjust or override the preliminary ranking and assessment. The decision panel will by unanimity make the final decision on which tenderers are to be awarded contracts.

Within 90 days after the final date for receipt of bids, an award decision will be sent to tenderers, also containing the reasons for the decisions taken. Contracts will be signed shortly after that.

Structure of the Decision Panel Meeting

PCP Competition Background & Scope

- Provided by a member of the SILVER consortium.
- The Decision Panel consist of the following 7 to 10 members:
 - At least 2 experts (with a maximum of 5) of those that assessed the proposals, of which at least one expert with knowledge of elderly care and at least one expert with knowledge of robotics

And

- 1 representative of the City of Eindhoven (the Netherlands),
- 1 representative for the City of Odense (Denmark) and the Region of Southern Denmark (Denmark),
- 1 representative for the city Oulu and the City of Vantaa (Finland),
- 1 representative of the City of Västerås (Sweden),
- 1 representative of the City of Stockport (UK)

or persons assigned by these parties.

Other representatives from the SILVER consortium, will be present at the Decision Panel meeting, participate in the discussion and advise the Decision Panel members listed above, but are not a member of the Decision Panel and therefore do not have decision-making power in the meeting.



The meeting is chaired by a representative of the Authority. The chair is not a member of the Decision Panel.

Outline of process

- The Decision Panel members must have read all bids relative to the assessment criteria before the meeting.

Introduction

- Provided by a member of the SILVER consortium.
- Show list of projects to be moderated in the Preliminary Ranking spreadsheet.
- Focus is on moderation of scoring of Bids.
- Focus on quality & merit of each Bid.
- Confirm no conflicts of interest.

Moderation of the Bids

- Chaired by a representative of the Authority
- Review the list of Bids shown in the preliminary ranking spreadsheet, starting with the bid with the highest overall score and going down.
 - Ask each expert in rotation to give initial overview and then invite views from the other members of the Decision Panel.
 - The Decision Panel can adjust or override any individual assessor score by each single criterion by unanimity decision and must provide substituting scores and reasons relative to the assessment criteria.
 - Document any changes in scores, other actions and comments on each Bid discussed relative to the initial assessment criteria.

Rank the projects based upon the moderated scores

- Confirm final ranking order using the updated Preliminary Ranking spreadsheet and confirm which tenderers will be awarded dependent on their final ranking, availability of budget, ability to meet the minimum scores (60% of the max number of points for Impact and 60% of the max number of points for Quality + Impact), compliance with minimum requirements and unanimity decision to award to the applicant.

Meeting chair to confirm as a quality check for the process:

- The decision panel by unanimity agrees that the process has been followed fairly and that the outcome of the panel decision represents this.
- Review the detailed comments for each Bid with the Decision Panel to agree the final minutes of the meeting to document any changes agreed and reasons why, relative to the assessment criteria.

Assessment criteria and weighting

The maximum score a bid can get is 500 points. Only bids with the following minimum scores are eligible for a contract: 60% of the maximum number of points for

- Impact (150 points from a maximum of 250 available for Phase 2)
- Impact + Quality of the bid (210 points from a maximum of 350 available for Phase 2).

The assessment criteria and their weighting are listed below. The full scoring model is found in the appendix at the end of this document.

The criteria and the method for evaluating the bids in Phase 3 will essentially be based on the criteria and the method used in evaluating the original bids as set out below, but may be elaborated or developed in further detail within those frames.

For Phase 2 and Phase 3 the criterion “The extent to which the approach analyses the economic and financial needs of the contracting authorities procuring the to-be-developed solution and whether it is a realistic analysis, comparing both Total Cost of ownership and time savings.” has been added to the assessment criteria of Phase 1.

This criterion concerns the phase when the new solutions are ready to be commercially procured and implemented. In order for the innovations to be used tenderers are asked to explain how their innovation will have an impact upon the economic and financial needs of the Contracting Authorities and to compare the benefits of the solution with the current practical challenges in a domestic setting.

<i>Criterion</i>		<i>Maximum points</i>		
		<i>Phase 1 (max 350)</i>	<i>Phase 2 (max 500)</i>	<i>Phase 3 (max 1300)</i>
Impact on the challenge		200	250	680
I	The extent of how well the proposed idea/ solution/ technology meets the challenge as detailed in the Brief, and whether it will have the desired impact	40	40	80
II	Potential of the proposal to address future/ wider challenges in the challenge area in an innovative way (e.g. by developing or employing novel concepts, approaches, methodologies, tools, or technologies)	20	20	40
III	Amount of time saving the solution will realise = III.1 x III.2	40	80	240
III.1	Amount of time saving the solution will realise in a(n imaginary) city of 100.000 people according to the tenderer’s calculations (in Phase 2 more detailed information may be provided to make more precise calculations in a real city for Phase 3)	20	40	120
III.2	Validity of the indicated time saving	multiplier (0, 1, 2)	multiplier (0.2-2)	multiplier (0.2-2)
IV	The extent of how usable (ISO ² definition usability) the solution will be for the target group (care givers or care receivers)	40	40	80
V.1	The extent to which the approach analyses the economic and financial needs of the contracting authorities procuring the to-be-developed solution and whether it is a realistic analysis comparing both Total Cost of ownership and time savings.	not assessed	50	200
V.2	The extent to which the approach demonstrates commercial feasibility, and whether it is a realistic commercialisation plan / route to market taking into account the analysis under V.1	60	20	40

² The international standard, ISO 9241-11 defines usability as: The extent to which a product can be used by specified users to achieve specified goals with effectiveness, efficiency and satisfaction in a specified context of use.



Criterion		Maximum points		
		Phase 1	Phase 2	Phase 3
Quality of the bid		100	100	200
VI	Validity of the technical approach that will be adopted	20	20	40
VII	The extent to which the bid shows a clear plan for the development of a working solution, and whether it is a reasonable plan to finish Phase 3 in time	20	20	40
VIII	Effectiveness of the project management	20	20	40
IX	The extent to which the tenderer and/or subcontractor shows or demonstrates to have dedicated the resources (e.g. human capital, equipment, etc.) necessary to perform the scope of the tender	20	20	40
X	The extent to which crucial risks (technical, commercial and other) to project success are identified, and how effectively these will be managed	20	20	40

		Phase 1	Phase 2	Phase 3
		Price		50
XI	<p>The scoring for the price for Phase 2 will be calculated with the following formula: Score = $150 - [149 / (120,000)] * (\text{bid price exclusive of VAT} - 60,000)$</p> <p>score = $S_{\max} - [(S_{\max} - S_{\min}) / (P_{\max} - P_{\min})] * (\text{total price} - P_{\min})$ P_{max} = 180,000 P_{min} = 60,000 S_{max} = 150 S_{min} = 1</p> <p>Bids with prices below 60,000 Euros will score the maximum points.</p>	50	150	420

It is incumbent upon the tenderer who seek to obtain points to supply information which enables the scoring of the bid.

The scoring will be made according to an absolute scale, meaning that several tenderers can receive the same score and that the point a particular tenderer receives is not affected by the points other tenderers have received.

If two bids are awarded the same number of total points in the evaluation process, the bid with the highest points on *Impact* will be ranked higher. If they are awarded the same number of points on *Impact* as well, the bid with the *lowest price* will be ranked higher. If they are awarded the same number of points on price as well, they will, if necessary, be separated by drawing of lots performed by two officers of the Authority, or – if requested by either of the concerned tenderers – before a public notary or a representative of the local Chamber of Commerce. This will also apply to awards made for Phase 3.

Successful tenderers will be advised according to the published key dates and will be, if awarded a contract for Phase 2, expected to mobilise rapidly to start the project. It is



important that Phase 2 projects start soon after the contract has been issued, so that all projects can be assessed fairly and move on to Phase 3 concurrently and smoothly.

Confidentiality, publicity and information about the award

The principle of public access to official documents means that public documents and records (with a few exceptions) should be made available to whoever asks for them. The principle is balanced by the *obligation of professional secrecy*, that sets down that public authorities are obliged to protect business secrets of others, if disclosure may seriously harm their interests.

Experts, employees of the Authority and other persons contracted to aid in the tendering and award process will handle all information confidentially in accordance to above. Experts with a conflict of interest with one or more of the bids will not assess these bids.

Information from the bids is confidential in accordance to above. However, the Authority will distribute and publish the following information about the bids that are awarded with contracts:

- The name of the organisation
- Their location
- The title of the project
- A short summary of the project
- Contract value

The aforesaid award information will be sent to the contact information stated in the tender.

Tenderers should be aware that the Authority reserves the right to publish public summaries of the results of the PCP projects (Phase 1, 2 and 3), including information of the key R&D results attained and lessons learned by the Authority. Details will not be disclosed that will harm the legitimate business interest of the contractors involved in the SILVER PCP or that would distort fair competition on the market.

Distribution of IPR resulting from the project

R&D risks and benefits will be shared between contractors and the Authority in such a way that all parties have an incentive to pursue wide commercialisation and take up of the new solutions. Therefore, ownership rights of IPRs generated by a contractor during the PCP contract will be assigned to that legal entity.

The Authority and the group of SILVER contracting authorities in SILVER will be assigned a worldwide free and non-exclusive licence to use the R&D results for internal use. A call-back provision will ensure that IPRs that are not exploited within 4 years after the PCP project will return back to the Authority and the group of contracting authorities in SILVER.

The Authority and the group of SILVER contracting authorities in SILVER can request the contractor to offer licenses to third parties under fair and reasonable conditions with consideration of the rights of other third parties that do not accrue to the Contractor.

For specific information about IPR rights and obligations please see the Silver_06 Framework Agreement art. 17 and 18.



Judicial review

Any legal claim, or petition or application for judicial review, with regard to the present procurement procedure, whether before civil law courts or administrative courts, shall be made in England. By submitting a tender, the tenderer accepts the exclusive jurisdiction of English courts.

List of documents

This Invitation consists of the following documents:

- SILVER_12 Call for bids for Phase 2 (this document)
- SILVER_02 Challenge Brief
- SILVER_06 Framework Agreement
with Updated Call-off Contract Phase 2 (section 3,4,5)
- SILVER_13 Guidance bid form Phase 2
- SILVER_14 Bid Form
- SILVER_07 End of Phase Report

The documents are all marked with the reference number SILVER_xx.



Annex: Scoring Model

The scoring guide below gives indicative marks. Assessors are free to use the full range up to the maximum per question. Scoring will be made between 1 and 10 points, using only whole numbers.

1. Impact on Challenge

I.	The extent of how well the proposed idea/ solution/ technology meets the challenge as detailed in the Brief, and whether it will have the desired impact. Based on the functional requirements and performance specifications in SILVER_02 Challenge Brief
	Scoring Guide
1	There is no indication that the proposal will meet the challenge
2	There is very little indication that the proposal is likely to meet the challenge
4	There is little indication that the proposal will meet the challenge
6	There is some indication that the proposal is likely to meet the challenge
8	There is indication that the proposal will meet the challenge
10	There is clear indication that the proposal is likely to meet the challenge

II.	Potential of the proposal to address future/ wider challenges in the challenge area in an innovative way (e.g. by developing or employing novel concepts, approaches, methodologies, tools, or technologies)
	Scoring Guide
1	The project shows no potential to address future / wider challenges in the area
2	The project shows little potential to address future / wider challenges in the area
4	The project shows some but limited potential to address future / wider challenges in the area
6	The project shows potential to address future / wider challenges in the area (including in particular novel, innovative approaches)
8	The project shows adequate potential to address future / wider challenges in the area (including in particular promising new concepts, approaches, methodologies, tools or technologies)
10	The project shows very high potential to address future / wider challenges in the area (including in particular innovative, showing use of novel concepts, approaches, methodologies, tools or technologies)

III.	Amount of time saving the solution will realise in an imaginary city of 100,000 people = III.1 x III.2
III.1	Amount of time saving the solution will realise in an imaginary city of 100,000 people according to the tenderer's calculations
	Scoring Guide
1	The tenderer calculates savings between 10 - 34 hours a day
2	The tenderer calculates savings between 35 - 69 hours a day
3	The tenderer calculates savings between 70 - 104 hours a day
4	The tenderer calculates savings between 105 - 139 hours a day
5	The tenderer calculates savings between 140 - 174 hours a day
6	The tenderer calculates savings between 175 - 209 hours a day
7	The tenderer calculates savings between 210 - 244 hours a day
8	The tenderer calculates savings between 245 - 279 hours a day
9	The tenderer calculates savings between 280 - 314 hours a day
10	The tenderer calculates savings of more than 315 hours a day
III.2	Validity of the indicated time saving
	Scoring Guide
1	The given justification is not consistent with reality in procuring municipalities in procuring municipalities and the estimation on time saving is very unrealistic. The outcome is not valid.
2	The given justification is not consistent with reality in procuring municipalities in procuring municipalities and the estimation on time saving is unrealistic. The outcome is partly valid.
4	The given justification is not likely to be consistent with reality in procuring municipalities in procuring municipalities and the estimation on time saving is not realistic. The outcome is partly valid.
6	The given justification is consistent with reality in procuring municipalities and the estimation on time saving is not completely realistic. The outcome is partly valid.
8	The given justification is consistent with reality in procuring municipalities and the estimation on time saving is realistic. The outcome is partly valid.
10	The given justification is absolutely consistent with reality in procuring municipalities and the estimation on timesaving is fully correct. The outcome is valid.

IV.	The extent of how usable (ISO definition of usability) the solution will be for the target group (care givers or care receivers)
	Scoring Guide
1	There is no information given on the usability
2	The usability is poorly described and there is no indication that it takes into account the experience and capability of the target group
4	The usability described is unlikely to fit with the experience and capability of the target group
6	The usability is valid but may not sufficiently fit with the experience and capability of the target group
8	The usability described is valid and is likely to fit with the experience and capability of the target group
10	The usability described is highly valid and is likely to fit with the experience and capability of the target group

V.1	The extent to which the approach analyses the economic and financial needs of the contracting authorities procuring the to be developed solution and whether it is a realistic analysis comparing both Total Cost of ownership and time savings.
	Scoring Guide
1	The bid gives no indication that the solution is based on a realistic analysis of the economic and financial needs of the contracting authorities
2	The bid gives little or no confidence that the solution is based on a realistic analysis of the economic and financial needs of the contracting authorities
4	The bid gives some indication that the solution may address the economic and financial needs of the contracting authorities, however, there is little confidence in the analysis
6	The bid gives some indication that the solution is based on a realistic analysis of the economic and financial needs of the contracting authorities
8	The bid gives indication and confidence that the solution is based on a realistic analysis of the economic and financial needs of the contracting authorities
10	The bid shows clearly and without doubt that the solution is based on a realistic analysis of the economic and financial needs of the contracting authorities

V.2	The extent to which the approach demonstrates commercial feasibility, and whether it is a realistic commercialisation plan / route to market taking into account the analysis under V.1
	Scoring Guide
1	The bid gives no indication that the solution will be commercially feasible
2	The bid gives little or no confidence that the solution will be commercially feasible
4	The bid gives some indication that the solution may be commercially feasible, however, there is little confidence in the approach
6	The bid gives some indication that the solution will be commercially feasible
8	The bid gives indication and confidence that the solution will be commercially feasible
10	As described, the proposed outcome shows strong promise of commercial feasibility

2. Quality of the Bid

VI.	Validity of the technical approach that will be adopted
	Scoring Guide
1	There is no information given on the technical approach
2	The technical approach is poorly described
4	The technical approach described is unlikely to be valid for this challenge
6	The technical approach is valid but may not be sufficient to meet the challenge
8	The technical approach described is valid and is likely to meet the challenge
10	The technical approach described is highly valid and shows a strong likelihood to meet the challenge

VII.	The extent of which the bid shows a clear plan for the development of a working solution, and whether it is a reasonable plan to finish Phase 3 in time
	Scoring Guide
1	The bid does not contain a plan or milestones for the development of a working solution
2	The bid goes some way to describe a plan for the development of a working solution.
4	The bid contains a brief plan for the development of a working solution.
6	The bid contains a relatively clear plan for the development of a working solution.
8	The bid contains a clear plan for the development of a working solution.
10	The bid contains a very clear plan for the development of a working solution.

VIII.	Effectiveness of the project management
	Scoring Guide
1	Project management is not described in the tender.
2	Project management is poorly defined and gives little confidence that the project will be managed appropriately.
4	Project management is defined but gives little confidence that the project will be managed appropriately.
6	Project management is well defined; this may result in a well-managed project.
8	The bid shows a good management plan that should enable resources to be used appropriately, and shows some exploitation of research outputs
10	The bid shows a strong management plan that will enable resources to be used appropriately, and will ensure maximum exploitation of high quality outputs

IX.	The extent of which the tenderer and/or subcontractor appear to have dedicated the resources (e.g. human capital, equipment, man hours etc.) necessary to perform the scope of the tender
	Scoring Guide
1	There is no information that describes that the tenderer or any sub-contractor(s) have dedicated adequate resources.
2	There is minimal information that describes that adequate resources have been dedicated of the tenderer or any sub-contractor(s), therefore it is very difficult to make an assessment.
4	There is some information that adequate resources have been dedicated from the tenderer or any sub-contractor(s), but they appear unlikely to be sufficient for the project.
6	There is information, and adequate resources appear to have been dedicated from the tenderer or any sub-contractor(s).
8	There is information, and it clearly supports that adequate resources have been dedicated from the tenderer or any sub-contractor(s).
10	There is information, and it allows for an unreserved conclusion that adequate resources have been dedicated from the tenderer or any sub-contractor(s).

X.	The extent of which crucial risks (technical, commercial and other) to project success appear to be identified, and how effectively these will be managed
	Scoring Guide
1	The bid does not mention risks or how the tenderer intends to manage these
2	Management of risk is ill-defined and inappropriate
4	Management of risk is defined but is inadequate for this project
6	Risk is clearly considered and proposed management of it is appropriate
8	Risk is well defined and will be well managed
10	Risks are well understood and articulated in the bid and will be managed appropriately

3. Price

XI.	Price Phase 2
	Scoring Guide
	<p>The scoring will be calculated with the formula:</p> $\text{Score} = 150 - [149 / (120,000)] * (\text{bid price exclusive of VAT} - 60,000)$ <p>Bids with prices below 60,000 Euros will score the maximum points.</p>

SILVER_06. Framework agreement with Updated Call-off Contract Phase 2 (sections 3,4,5)

SECTION 3 CALL-OFF CONTRACT FOR PHASE 2

This call-off contract is made between

- (1) The Technology Strategy Board in the name and on behalf of the SILVER contracting authorities (the "Authority"); and
- (2) [] ("the Contractor")

Whereas:

1. The Authority and the Contractor signed the Framework Agreement for [Title of the project] dated [insert date], which provides for Call-off Contracts to be executed during the time of the Framework Agreement
2. The Contractor has send in a bid on [date] with reference to the Authority for Phase 2;
3. In this call-off contract specific conditions are laid down in relation to the performance of the work by the Contractor.

IT IS AGREED as follows:

1. Object

- 1.1 The Authority hereby commissions the Contractor to perform the Services as described in the bid submitted by the Contractor on [date], Ref [reference], in so far as this Agreement does not contain any provisions to the contrary, <(add if relevant) on the understanding that [free text: changes in relation to tender,; reference to any call-off contracts including dates, etc.], which commission the Contractor hereby accepts.>
- 1.2 The following documents form an integral part of this Agreement. In so far as any of them are inconsistent with each other, a higher ranked document will take precedence over a lower ranked document:
 - SILVER_06 Framework Agreement with updated Call-off Contract Phase 2 (sections 3, 4 and 5);
 - SILVER_12 Call for bids Phase 2
 - SILVER_02 Challenge Brief;
 - The bid for Phase 2.
- 1.3 Capitalised words and phrases in this Agreement shall, unless defined herein, have the same meaning as defined in the Framework Agreement.



2. Conclusion and duration

- 2.1 This Call-off Contract shall take effect once it has been signed by both/all parties.
- 2.2 The agreed Services will be completed by [end date].
Or <The agreed Services will be performed in the period from [start date] to [end date].>

3. Price and other financial provisions

- 3.1 Payments will be made on the basis of the payment schedule.
- 3.2 The fixed sum referred to in Article 3.1 amounts to [price] Euros including VAT, travel and accommodation and all other costs.
- 3.3 The agreed rates are fixed and will remain unchanged for the duration of this Agreement.
- 3.4 The remainder will be paid after the result of the Services has been received and accepted.
- 3.5 The invoices should be drawn up by the Contractor, stating the reference number stated at the top of this Call-off Contract and the names of the Contracting Authority's and the Contractor's contacts, and should be sent to: ...

4. Representatives (Project Managers)

- 4.1 The Authority's contact is [name and function]. The Contractor's contact is [name and function]

5. Final provision

- 5.1 It is intended that the indicated amounts will be paid by the Authority to the Contractor within xxx (advisory) 30 days of the dates listed.

Signed by the duly authorised signatory
of the Authority:

.....
Signature

.....
Full Name

.....
Position Held

.....
Date

Signed by the duly authorised signatory
of the Contractor:

.....
Signature



.....
 Full Name

 Position Held

 Date

Payment schedule

Date	Amount (Euros)
Payment dates to be added	
Financial Year 20XX/XX sub-total	
Financial Year 20XX/XX sub-total	
Financial Year 20XX/XX sub-total	
TOTAL	

SECTION 4 KEY STAFF

[NAME & FULL POSTAL ADDRESS]

[The Contractor's Representative]



[NAME & ADDRESS]

[NAME & ADDRESS]

[NAME & ADDRESS]

Stephen Browning
 The Technology Strategy Board
 North Star House
 North Star Avenue
 Swindon
 SN2 1UE

SECTION 5 DOCUMENTS

DOCUMENT TYPE: REFERENCES TO QUOTE

Phase 1 Documents

- SILVER_01 Invitation to Tender Document
(Process and Timelines)
- SILVER_02 Challenge Brief
- SILVER_03 Guidance (for completing Tender Form)
- SILVER_04 Tender Form
- SILVER_05 Questions & Answers
- SILVER_06 Framework Agreement all phases
- SILVER_07 End of Phase Report Form



DOCUMENT TYPE: REFERENCES TO QUOTE

Phase 2 Documents

SILVER_12	Call for Bids (Process and Timelines)
SILVER_02	Challenge Brief
SILVER_13	Guidance Phase 2 (for completing Bid Form Phase 2)
SILVER_14	Bid Form Phase 2
SILVER_15	Questions & Answers Phase 2
SILVER_06	Framework agreement with Updated Call-off Contract Phase 2 (sections 3,4,5)
SILVER_19	End of Phase Report Form Phase 2

Documents not included above are intentionally excluded from this Agreement



Annex to Call-off Contract Phase 2: Test Plan Phase 2

1 Introduction

The goal of this Test Plan (TP) for SILVER Phase 2 is to inform all who are involved in the testing process about the approach, the activities and the deliverables concerning the SILVER testing for **<name of the project>**.

In order to enhance the quality of the bids for the next phase it is necessary that the Authority and the group of SILVER Contracting Authorities look into the solutions, assess them and relate the solutions to their needs.

For the Contractors this step in the development process will help to build a prototype that fulfils the needs of the Contracting Authorities, by receiving input to improve the prototype. Contractors that successfully completed Phase 2 and received a Call for Bids Phase 3 will have to address the recommendations for improvement given in the Phase 2 Test report.

Successful Completion of Phase 2

Only tenderers that completed Phase 2 successfully will be invited to submit a bid for Phase 3.

The Framework Agreement states in Art. 2.4:

“Successful completion of a phase is assessed in terms of satisfactory completion time and quality of the work, as well as technical and commercial feasibility of innovative solution to address the PCP challenge against the solution requirements outlined in the SILVER_02 Challenge Brief, the SILVER_01 Invitation to Tender and the tender of the Contractor. The assessment of successful completion of a phase is carried out by the Authority or persons appointed by it.”

Technical and Commercial feasibility will also be assessed during the testing phase, however only those solutions that render not to be feasible at all will not be invited to tender for the next phase.

Final Payment

Successful completion of a phase is not related to the final payment, Art. 5.8 states:

“On completion of the Project Period, the final payment under the Agreement will be paid by the Authority to the Contractor within 30 (thirty) days, provided that:

- 5.8.1 the Project has been completed to the reasonable satisfaction of the Authority;
- 5.8.2 the reports required under Conditions 15 and 16 have been submitted by the Contractor; and
- 5.8.3 agreement has been reached in respect of any remaining issues needed to be settled.”

2 Documentation

The test plan is based on the SILVER_14 Bid Form Phase 2 and the results of the evaluation of the bid of Phase 2 in relation to the SILVER_12 Call for Bids for Phase 2 and the SILVER_02 Challenge Brief.

3 Test strategy

The Phase 2 prototype test is a usability engineering test, which will assess the solution in relation to the following criteria: safety, time savings, independence, quality of life, overall usability and technical feasibility. As the solutions are at a prototype level, the scope and purpose of the usability test is to assess the viability of the solution in relation to each criterion with the aim to

- 1) provide the Contracting Authorities with a basis for assessment of the solution's potential to contribute to the SILVER Challenge and the fulfilment of the Contractor's promise in the Bid Form Phase 2
- 2) provide the Contractor with feedback and recommendations to improve the solution for the next phase.

All solutions will be assessed based on a generic test scheme covering relevant criteria within safety, time savings and overall usability. Where a test is not applicable for a specific solution, the schedule will be marked as N/A along with the reasoning behind it.

The test will start by assessing safety in order to ensure a safe test environment for the end users/test persons participating in the following usability test.

Meeting the SILVER Challenge

As outlined in the SILVER_02 Challenge Brief,

“The SILVER challenge is to care for 10% more elderly with the same amount of staff in 2020 by having new robotics solutions that can take over all or part of the work of care givers. These robotics solutions should enable elderly – even when facing multiple physical and mental disabilities – to stay independently as long as possible and live in their own homes, if necessary in combination with assistance from home care staff.”

The Phase 2 prototype test will assess to which degree **<Project>** has the potential to meet the SILVER Challenge in relation to independence and quality of life based on the prototype's performance.

Independence: To which degree does the solution have the potential to support the target group to stay in their home for longer?

Quality of life: To which degree does the solution have the potential to increase the quality of life for the target group, e.g. by encouraging mental and physical health?

The potential will be evaluated on a scale from 1 to 5, where 1 is “no potential to <support the elderly to stay in their home for longer>” and 5 is “great potential to <support the elderly to stay in their home for longer>”.

Fulfilling <Project>'s Bid Form Phase 2 Promise

Based on the prototype's performance the test will assess the validity of <Project>'s promise in their Bid Form Phase 2 in relation to safety, time savings and usability.

Safety: The assessment will mainly consist of an evaluation of the potential safety issues related to usability testing with end users, including appearance, function and overall construction of the device. Consultants from the Health Innovation Centre of Southern Denmark (HICSD) will test the prototype in relevant tasks and situations for each solution.

Time savings: Time savings will be assessed based on the Contractor's expected contributions to time savings for caregivers as outlined by the Contractor in the Bid Form Phase 2 in relation to the target group and the targeted ADL tasks. (Assessment hereof will be estimations of the viability of the suggested time savings)



Usability: Usability will be tested through observation and semi-structured interviews, focusing on user experience. The prototypes will be tested in relevant p-ADLs in a simulated user environment designed for the solution and the target group. The usability test will give the Contractor and the Contracting Authorities an understanding of the users' experience and wishes but also their latent needs in relation to the solution, thereby providing the Contractor with an evaluation as well as input for potential improvement of the solution for Phase 3.

The usability evaluation will consist of a list of observations related to overall usability and intuitiveness of the prototype. Potential critical issues will be identified and recommendations for improvement provided

Technical and Commercial Feasibility

Based on the test findings the test team will assess whether the solution is technically feasible. If a solution is assessed to be non-technically feasible an explanation will be provided. The assessment will be based on the assumption that identified critical issues will be resolved.

The usability test results and assessed technical feasibility of the solution provides important input for the overall commercial feasibility assessment in the Phase 2 assessment, however the usability test in itself cannot assess the solution's commercial feasibility, as commercial feasibility covers many aspects outside the scope of usability testing, e.g. the business plan included in the Contractor's End of phase report.

Recommendations

Based on the test findings the test team will provide a list of potentially critical issues and recommendations to improve the results for Phase 3.

All recommendations should be addressed in the Contractor's Bid for Phase 3.

4 Approach

Test Schedule

For safety purposes and in order to allow for potential fix time in case of failure, as these are prototypes, the test schedule covers safety and time savings in week 1 and usability and time savings in week 2 on the same weekdays for each project, as shown below:

Week 1 – Safety and Time Savings		
MONDAY	TUESDAY	WEDNESDAY
Day 1 testing for Project 1	Day 1 testing for Project 2	Day 1 testing for Project 3
Week 2 – Usability and Time Savings		
MONDAY	TUESDAY	WEDNESDAY
Day 2 testing for Project 1	Day 2 testing for Project 2	Day 2 testing for Project 3

This schedule allows all projects a week's time to fix the prototype should it suffer a failure. Where a problem has had to be resolved, Day 2 will cover regression testing for a maximum of half an hour within the defined time frame for testing. Regression testing will not involve end users, who will only be involved in testing when the safety assessment is final.



Alterations between test day 1 and 2

It is paramount that any alterations of the prototype between test day 1 and 2 are agreed with the HICSD test team. Subsequently HICSD will assess whether regression testing is necessary in relation to safety for end user involvement.

Storing of prototypes between test day 1 and 2

It is possible to leave the prototype at HICSD’s premises between test day 1 and 2, however the Contractor will need to insure the prototype for this period, taking into consideration that the HICSD test facilities is an open environment with many visitors during the day.

Dates for Testing

The testing dates for <Project> are:

Day 1

Day 2

Target Group

The target group for the usability test will be elderly people who have a degree of disabilities or weaknesses related to each solution and are suited for participating in a test.

HICSD will endeavour to recruit end users who fit the below described target group as precisely as possible, however the recruited target group will be subject to the limitations of availability of volunteers with this specific profile.

As it is not possible to test on all possible combinations of user types (build, disability etc.), relevant end user profiles and practical limits to testing are set for each solution. HICSD will endeavour to ensure that the results are comparable between projects, however recognising the very significant differences between the functions addressed by each solution this will not be easily achieved. In the final report HICSD will comment on the potential for use in, and any issues that could result from, a wider user population in relation to the Challenge Brief.

Both users from the target group and caregivers will be part of day 2; usability testing.

The target group for the prototype testing of <Project> is:

Age	
Size	
Problems (disabilities)	
Required functional capabilities	
Current caregiver need	

Test tasks

Based on the Contractor’s targeted p-ADLs and estimated time savings the test of <Project> will focus on the following p-ADLs:

p-ADL	Testing tasks
p-ADL 1 Personal hygiene and grooming	
p-ADL 2 Eating and drinking	
p-ADL 3 Maintaining continence or the ability to use a restroom incl. dressing and transfer	



p-ADL 4 Taking medication as prescribed	
p-ADL 5 Functional transfers	
p-ADL 6 Dressing and undressing	

Test tasks will be conducted with respect for the privacy and comfort zone of each individual test user.

The tests will be conducted in accordance with the intended use of the solution.

Test Criteria

Safety

The following topics will be addressed, taking relevance and prototype level into consideration:

- Materials
- Emitted sound and vibrations
- Surface temperature
- Sterility
- Safety and moving parts
- Prevention of traps for the human body
- Folding and adjusting mechanisms
- Carrying handles
- Assistive products which support or suspend users
- Surface, corners, edges and protruding parts
- Small parts
- Stability
- Forces in soft tissue of the human body
- Ergonomic principles
- Other areas of interest

The safety topics are inspired by the European Standard DS/EN 12182, which specifies general requirements and test methods for assistive products for persons with a disability.

The final report will not list the solution's performance within each of the topics but will point out critical issues encountered during the preliminary safety assessment.

Usability

Based on use of the prototype for the targeted p-ADL tasks the usability test will result in a list of observations related to overall usability and intuitiveness of the solution. The test will identify potential critical issues and provide recommendations for improvement.

Limitations of Prototype Testing

According to the SILVER_12 Call for bids for Phase 2, Phase 2 Prototyping, SILVER Phase 2 adopts the following understanding of a prototype:

“In general a prototype is an early sample, model or release of a product built to test a concept or process or to act as an object to be replicated from. A prototype is supposed to guide and improve the design. [...] In this context [Phase 2] the term “prototype” more specifically means “user experience prototype” [...] primarily used to support user focused research.”

Taking the prototype level into account, HICSD's test will be a usability engineering test aimed to provide an early assessment and give recommendations for relevant focus areas. Testing at this stage cannot be classed as clinical, nor can HICSD act as CE assessors.

Risk Schedule

Leading up to the Phase 2 test the Contractor shall perform their own equivalent prototype tests and submit an Input Testing Document identifying the risks and mitigation in relation to testing the prototype. Based on this input HICSD can plan for a safe test environment. The Input Testing Document is described in more detail below.



Day 1 of testing will function as a “safety gate” which the prototypes will have to pass to meet the end users on day 2. The HICSD test team will assess whether the prototype is ready for testing with end users.

If the testing needs to be stopped for safety reasons, HICSD will record the reason for stopping and inform the Contractor why but will not offer any potential solution to the problem. If the problem can be resolved within the set time frame of the testing, i.e. the planned day 1 and 2, HICSD will assess whether testing can be continued on the spot. It will not be possible to retest at another time than the agreed day 1 and day 2.

Input Testing Document

The Input Testing Document to be submitted to HICSD by the first week of March 2015 should include:

- a description of the outcome of the Contractor’s own testing of the prototype
- information about any environmental, energy or other limitations to the prototype relevant in relation to testing
- risks and mitigation related to prototype level, e.g. a plan for how the prototype interacts with stairs, water, thresholds etc.
- specifications and (regional) installations requirements (weight / height / dimensions) of the solution
- information regarding the need for user instructions in relation to the end user involvement during testing.
- proof of insurance of people involved in Phase 2 testing (see below section 6)

Presence during Testing

Based on HICSD’s experience working with vulnerable people, the presence of ‘observers’ during these tests has a significant impact both on the outcome of the tests and the well-being of the end user. For this reason the Contracting Authorities and Contractors are invited to attend the Day 1 safety and time saving assessment.

On Day 2 only the test team, users and caregivers will be present during testing in order to ensure a comfortable and natural testing environment. Contractors should be available on site to attend to the equipment but will not be present in or overlooking the test area during testing.

Data Privacy

The end users participating in the day 2 usability testing will be anonymous and their data will not be shared with anyone other than the test team in relation to planning the test. All private data about end users will be handled according to the national regulations in Denmark (Datatilsynet).

The Contractor will not have contact with or access to the end users at any point. If instructions are required for the use of the prototype, this instruction will be given by the HICSD test facilitators. The Contractor should inform HICSD about instruction requirements in the Input Testing Document and will be responsible for preparing the HICSD test facilitators to instruct the end users. This instruction shall take place on the day 1 of testing.

Ethics

The Regional Scientific Ethics Committees for Southern Denmark have been informed of the plans for SILVER Phase 2 testing and they have confirmed that since the project revolves around “development of technology” it is not classified as a “medical scientific research project” and should not be reported officially to the Scientific Ethics Committee.

Confidentiality

HICSD will aim to keep the solutions confidential, however, as HICSD’s test facilities is an open environment, HICSD cannot guarantee that the solution will not be seen by HICSD employees and visitors. Access to the solution will be restricted to the extent possible by storing the solution in a closed room with a note saying ‘No Access’ on the door.



Similarly, HICSD will inform the parties involved in testing that the solutions are confidential and ask them to sign a confidentiality agreement in order for the Contractor to be able to safely patent the innovation at a later stage, however as a standard risk in connection with testing we cannot control that they will not disclose any information regarding the solution.

As part of standard testing procedure the testing will be recorded for the purpose of post-test analysis and reporting. The video will only be shown to the test team and external experts involved in the evaluation. The video will be saved on a secure site.

5 Testing environment

Testing will be conducted at the controlled test facilities at the Health Innovation Centre of Southern Denmark, Forskerparken 10G, 5230 Odense M, Denmark.

Every solution will demand specific requirements from the environment where it will be tested. The environment will be (subject to HICSD's limitations) tailored to these specific demands in close consultation with the Contractor.

The test environment which HICSD will build is a mock-up of a home of the target group. As such it is a "home environment" with the relevant rooms and the relevant functionality needed to test the solutions from a user experience perspective. HICSD will provide a relevant and realistic test environment to test the solutions and to investigate potential for improvement with end users. The mock-up will resemble a standard home of the target group. The Contractors will provide all relevant technology to make their solution function in a home. As such the test set up will reflect a realistic end user scenario with a private home of an elderly person as the frame within which a solution will have to function.

6 Insurance of Prototype and Test Users

In accordance with clause 24 of the SILVER_06 Framework Agreement it is the responsibility of the Contractor to insure the HICSD employees and end users involved in the Phase 2 testing. In order for HICSD to perform the test it is mandatory that the Contractor has an insurance that specifically covers the use of a product under development in a test situation.

7 Management

Testing Team

The HICSD test team will consist of:

- 1 Project Manager (M.A. in International Business Communications)
- 1 Engineer (M.Sc. in Product Development and Innovation)
- 1 Design Professional (M.A. in Design Management).

The tests will be performed by an engineer and a design professional with experience in usability engineering tests. Other experts such as health experts and caregivers will also be invited to give their input where relevant.

Point of Contact

Project Manager

Email:

Phone:



Escalation Procedures

The escalation chain is Project Manager HICSD, Vice President HICSD and then SILVER Project Manager.

8 Planning

The timeline and key milestones are:

August – December 2014:	Test planning in dialogue with Contractors and Contracting Authorities
5 th December 2014:	Final annex submitted for signature, including detailed test documentation
17 th December 2014:	Annex to contract signed by Contractor and received by Innovate UK
January-March 2015:	Recruitment of target group for end user involvement
Before March 2015: for	Contractor to perform testing of the prototype in preparation the prototype testing at HICSD
1 st week of March 2015:	Test team to view prototype and Contractor to submit Input Testing Document
13 th – 15 th April 2015:	Test day 1
20 th – 22 nd April 2015:	Test day 2
29 th April 2015:	Test data (list of potentially critical issues submitted)
20 th – 22 nd May 2015:	Preliminary Test Report distributed
3 rd – 5 th June 2015:	Deadline for comments to be added to report
12 th June 2015:	Final Test Report submitted

9 Assessment Results: Test Report

Contractors receive test data in the form of a list of potentially critical issues discovered after testing day 2 and agree that the call-off contract is awarded under the condition that these results will be used to write the Test report. The potentially critical issues will be further analysed and elaborated on in the Test Report.

A preliminary Test report will be sent within a month after testing day 2 and will include an analysis of the testing results and recommendations and suggestions for improvement of the prototype for the next Phase. The Contractor will have 14 days to submit comments to be added to the Test Report before the report is finalised and then sent to all the partners in the SILVER Consortium.

The Test Report will include:

- information regarding risks and mitigation



- an evaluation of the solution's potential to meet the SILVER Challenge in relation to the independence and quality of life, including a score
- an assessment of the solution's potential to save the estimated time for care givers provided in the Bid Form Phase 2
- a usability evaluation including a list of observations
- an assessment of the technical feasibility of the solution
- recommendations to improve the results for Phase 3, including a list of potentially critical issues
- concluding remarks regarding the fulfilment of the promise in the Bid Form Phase 2 and the solution's potential to offer a usable robotics solution that could contribute to the SILVER Challenge

9 Closure

After the finalisation of this report, no further communication will be entered into regarding the report. The updated testing scheme supersedes any other draft documentation in the original Call for bids.



SILVER_13. Guidance bid form Phase 2

These Guidance notes complement the SILVER_12 Call for Bids and are designed to help with completing the SILVER_14 Bid Form.

Guidance on completing the SILVER_14 Bid Form

These notes should be read in conjunction with the SILVER_14 Bid Form and are designed to help you to provide the information required.

Where text limits are indicated, please do not exceed these.

Tenderers have been assigned a reference number in Phase 1. It should be noted that you will need it for all subsequent enquiries and it will stay with the project for its duration.

The SILVER_14 Bid Form should be completed using the following administrative instructions:

- Use a font size no smaller than 10 (Arial). Keep the use of acronyms to a minimum. Only use acronyms where a term is mentioned frequently throughout the tender. If you do choose to use an acronym, do not assume that the reader knows what it means, and be sure to define it, bearing in mind that individual sections of the bid may be read separately during the selection process.
- Use of English language
- Completion of all mandatory fields. Please note all fields are mandatory
- Completion of self declaration tick box
- Bids cannot exceed the maximum price of 180,000 euros (excluding VAT).

In order for your bid to be accepted and assessed, compliance with the administrative instructions will be checked. Please submit all necessary and required information. This includes all mandatory fields from the Bid Form. Failure to complete these fields will immediately result in your bid being rejected on the grounds that it is incomplete.

For details on how to tender, please see:

- SILVER_12 Call for Bids Phase 2 and SILVER_02 Challenge Brief
- SILVER website: www.silverpcp.eu

Questions should be addressed to:

- E-mail: competitions@silverpcp.eu

For technical assistance:

- Telephone: +44 (0)300 321 4357



Bid, Tenderer and Contact Details (mandatory)

Bid (mandatory)

- **Project title**
Please provide the title for the project. This should be both clearly descriptive and concise. It should contain keywords relevant to the project.
- **Project Duration**
This section may have already been completed; Phase 2 is of a fixed duration of 12 months.
- **Phase 2 Contract Price:**
State a total price with and without VAT for the tendered project, Phase 2.
- **Price with and without IPR**
To make sure a fair market price is offered, please state two prices:
 - *The price that you would have quoted*, if IPR would be fully retained by the Authority, and you did not have the possibility to exploit developed knowledge.
 - *The price that you quote*, considering that you retain IPR in accordance with the provisions of the contract and can exploit developed project knowledge.
- **What is the best way to describe your innovation?**
Select from options.

Tenderer Details (mandatory)

Please submit the name of your legal entity, proposed sub-contractors and other details as requested on the Bid Form.

If the tender is submitted by a consortium that does not in itself constitute a legal entity, such tenderer shall appoint a consortium member to be the contracting party in case the tendering consortium is awarded a contract for the next Phase.

Contact Details (mandatory)

Please submit the lead tenderer's name, post held, name of legal entity, position etc. Lead tenderers are expected before submitting tenders, to have discussed their proposals with their own organisation or any other body whose co-operation will be required in the conduct of the project.

By submitting the tender you are confirming that the information given, in this tender, is complete and that you are actively engaged in this project and responsible for its overall management and agree to administer the award if made. .

Public description of the project (mandatory)

Please enter a brief summary of your project that can be used for marketing purposes of successful tenders, e.g. between 50 to 150 words. Make sure that the wording is understandable to the general public and that it is suitable for public disclosure.

Impact on the Challenge

I. Title and Description of Proposed Idea / Solution / Technology and its Expected Impact on the Challenge (mandatory)

Avoiding the use of unnecessary technical jargon, describe clearly how the proposed project will deliver the outcomes as described in the SILVER_12 Call for Bids Phase 2 and SILVER_02 Challenge Brief documentation.

II. Potential of the Proposed Idea / Solution / Technology to Address Future and/ or Wider Challenges in the challenge area (mandatory)

Avoiding the use of unnecessary technical jargon, describe clearly the potential of the proposed project to address future and / or wider challenges in the challenge area described in the SILVER_12 Call for Bids Phase 2 and SILVER_02 Challenge Brief documentation.

III. Amount of time saving the solution will realise in an imaginary city of 100,000 people according to your calculations (mandatory)

Please calculate the amount of time saving the solution could realise in an imaginary city of 100,000 people with the spreadsheet **SILVER_14b Savings**. In this spreadsheet you can enter your figures for the relevant ADL or ADLs. It is only possible to enter figures in the four yellow columns, one for respectively

- time savings per visit,
- reduction of visits with 2 persons,
- number of clients where the innovations will save time and
- visits that can be fully cancelled.

Not all columns must be completed and only the ADL(s) where your innovation can save time should be completed.

In the Bid form you will provide the relevant figures you have used in the spreadsheet formula and the outcome of this calculation for your robotics solution. Also you are asked to give a justification on the relevant input data you have used in the calculation sheet. Please elaborate on who your end users are and what their functional level is. Also specify what specific ADL task(s) and subtasks your solution is targeting.

IV. Usability for the target group (mandatory)

Describe how you will take into account the target group's (either carers or elderly) experience and capability when developing your solution and how this will make your solution usable for the target group. Usability is defined as: "The extent to which a product can be used by specified users to achieve specified goals with effectiveness, efficiency and satisfaction in a specified context of use." (ISO 9241-11)

V.1 Economic and financial needs of the contracting authorities

Describe how the innovation will have an impact upon the economic and financial needs of the Contracting Authorities. Give price estimations of Total Cost of Ownership: initial costs, or a monthly price, energy consumption per year, running costs, maintenance costs, training costs, licensing costs and any other relevant costs

and compare it to time saving as calculated in III.1. For caretakers costs please use a fixed price of 35 Euros per hour. Please provide an explanation behind your costings. Also provide arguments how the solution can fit in the operational management of the Contracting Authorities and compare the benefits of the solution with the current practical challenges in a domestic setting.

V.2 Commercial Feasibility and Route to Market (mandatory)

Describe the commercial feasibility of the new solution. We are seeking evidence that the new solution can be made into a viable product and achieve the proposed benefits. Please detail clearly how you seek to commercialise and exploit your product and to which market (s) you would seek to target this product at the end of this PCP and what your business case to these markets would be.

Quality of the Tender

VI. Scientific / Technical Project Summary (mandatory)

Please provide a structured summary of the scientific and technical basis of the project and highlight the research and development behind the project. Please specify how the learning undertaken in Phase 1 will benefit your project. Please provide details of any competing technologies / market alternatives and the relative benefits of the proposed approach. Include details of any existing IP and its significance to your freedom to operate. Explain how this scientific / technical basis and the proposed R&D approach fit with the robotics definition.

VII. Project Plan and Methodology (mandatory)

The project plan should identify the major packages of work within the project, with well-defined milestones and deliverables. The plan for Phase 2 should be comprehensive – for Phase 3 only an outline is required.

The emphasis throughout should be on practicality – we are seeking evidence that a working new solution can be developed in time (end of Phase 3). Appropriate record-keeping and reporting are essential but reports are not in themselves the main goal of the project.

- A Gantt chart should be supplied (in Microsoft Office, Microsoft Project or PDF format).
- Please provide an indication of how any IP which might arise during the project would be handled.
- Allow for preparation of a detailed plan for Phase 3, towards the end of Phase 2.

(Progression to Phase 3 is dependent upon successful completion of Phase 2 and on Phase 3 Bid and assessment).

Please outline how your proposal will fit with the required testing scheme contained in the SILVER_12 Call for Bids Phase 2.

VIII. Project Management (mandatory)

Identify the project management processes that you will use to ensure that milestones are achieved in a timely manner.



IX. Resources (mandatory)

Describe in detail the skills, expertise and track record of the team, including relevant knowledge and skills of each member and the proportion of their time that will be spent on the project. Relevant commercial and management expertise should also be included. Also include the expertise of any subcontractor/s. Also state which resources, employed by the tenderer and by subcontractors, are working in the territory of the EU Member States and the countries associated to FP7 in order for the Authority to verify the compliance with the minimum requirement: place of performance of the R&D services.

X. Risk Management (mandatory)

Provide details of identified risks (technical, commercial and environmental) and mitigation actions.

Price

XI. Price phase 2 (mandatory)

Bids cannot exceed 180,000 euros (excl. VAT). Any bid with a higher price will not be assessed. Use the indexed unit prices as stated in Phase 1 (see justification section).

In addition to labour price for executing the R&D activities, needed to address the PCP challenge, the following items can be included in the price offer: e.g. the price of equipment needed to develop the prototypes or test products, the price for installing such prototype or test equipment on the procurer's premises for the duration of the test phase, the price of travel and accommodation to test sites.

- **Payment schedule**

Give a proposed payment schedule for Phase 2.

XI. Continued – Justification of price (mandatory)

- **Unit prices**

In Phase 1 you have quoted binding unit prices / hourly rates for each category of R&D resources (e.g. junior, senior researchers, developers, testers, etc.). Use the indexed quoted unit prices and specify other costs.

Give the calculation (unit prices multiplied by quantity) how you have calculated the total labour costs.

Please bear in mind the unit prices given in the Phase 1 Tender Form are legally binding as part of the framework agreement. Failure to comply with these requirements will be deemed a breach of the Framework Agreement and you could be excluded from this PCP. It is your responsibility to ensure the figures are consistent and correct.

The list of resources given in Phase 1 covers all types of resources foreseen to be needed to carry out the work. In Phase 2 and Phase 3 no new resources can be added.

The Authority can ask you to provide evidence that unit prices of third parties are reasonable (e.g. by submitting several offers, etc.). Third parties are parties that are not subcontractors (e.g. airlines, hotels, companies that merely rent out equipment, etc.).

Please keep in mind that as for Phase 1, in Phase 2 the value of the labour for executing the R&D services (the total price of all man-hours of researchers, developers and testers) needs to be at least 51% of the overall contract value.

- **Indication price for Phase 3**

In the bid for Phase 2 please give an indication of the expected price for Phase 3. Make sure you use the (indexed) binding unit prices as stated in Phase 1 for resources. When calculating an indication price for Phase 3, you may assume an inflation of 3% per year.

In the bid for Phase 3 you will be asked to provide a breakdown of the price as you have done for Phase 1 and 2. In this bid, you may adjust the unit prices already quoted in Phase 1 by a percentage that is not higher than the inflation rate calculated by the Monetary Union Index of Consumer Prices (MUICP) compared to the year before.

Please keep in mind that also for Phase 3 the value of the labour for executing the R&D services (the total price of all man-hours of researchers, developers and testers) needs to be at least 51% of the overall contract value.

Usability in 5 countries (mandatory)

Describe how you will take into account that the solutions must be usable in the countries of the group of SILVER contracting authorities, i.e. Denmark, Finland, the Netherlands, Sweden and the UK and preferably all over the EU. And, if relevant, if you can easily modify the solutions to communicate with local customer-information systems.

Please demonstrate how your product is interoperable with other telehealth / telecare equipment.

Please submit a Data Protection and Securities Policy which will demonstrate how you will meet both national and European standards on Data Protection and Data Security.

Ethical aspects (mandatory)

Please describe clearly and as completely as possible which ethical aspects might play a role regarding your solution and how you will tackle these.

As is made clear in the original guidelines Bids must not:

- process personal data
- involve persons unable to give their consent
- track people's location

With this in mind all tenderers must complete the Ethics Issues Table (see annex 14c) and submit together with the Bid.

Professional Secrecy (mandatory)

Please indicate which parts of the information in the bid should be confidential, and indicate why disclosure of such information may be harmful to you.

Declaration (mandatory)

You are asked to declare the following and submit this form before the SILVER Bid deadline.

Declaration (mandatory)

The lead tenderer is expected to have discussed the bid within its own company and any other body whose co-operation will be required to deliver the project.

The lead tenderer will need to obtain consent from an authorised officer or appropriate signatory who will sign the contract if successful; we will provide a contract for review. The contract is a legally binding document and subject to the outcome of this competition.

By submitting the bid you are confirming that the information given, in this bid, is complete and that you are actively engaged in this project and responsible for its overall management and agree to administer the award if made. You are confirming that

- your organisation is prepared to carry out this project at the stated price;
- you are not subject to the exclusion criteria;
- that the services offered are within research and development as mentioned in the Frascati Manual;
- that you comply with the minimum requirements stated in the SILVER_12 Call for Bids Phase 2.
- You are also confirming that you have read and understood the relevant explanatory materials i.e. the SILVER_12 Call for Bids, the SILVER_13 Guidance Bid form.

In order to offer further opportunities for government support we reserve the right to pass your contact details on to other government agencies.

By submitting this bid you acknowledge that you have read the statement above and agree that your contact details can be passed to other government agencies.

I hereby confirm that I fully comply with the declaration as stated above (please click).

PLEASE DO NOT SEND COMPLETED BIDS BY POST OR BY ANY OTHER MEANS THAN THROUGH THE SECURE WEBSITE.

This form must be submitted electronically by 13.00 CEST at the deadline for Bids Phase 2.



SILVER_18. Decision notice Phase 2

Dear ...,

Thank you for submitting a bid for Phase 2 to the SILVER PCP.

Assessment

All tenders eligible have been evaluated by a decision panel, as accounted for in the SILVER_12 Call for Bids.

[number] tenders were received, and [number] were ineligible for contract or excluded under the exclusion criteria in the Call for Bids for Phase 2 document.

[ALT 1:] All tenders received have met the requirements set out in the tender documents.

Decision Notice

By a decision on the [date, month, year], the Authority Technology Strategy Board has decided to award contract to [3 or 4] tenderers, the list of the awarded contracts are published on www.silverpcp.eu. The Authority intends to sign contracts with the chosen tenderers.

Motivation for individual bids

The motivation will be available within one month of this notification email and can be found by accessing the upload FTP Site. Please use your existing username and password, the document can be found in a zip file in the feedback folder on your secure site.

The feedback is compiled using the written comments of the independent assessors who reviewed and assessed your Bid. It is intended to be constructive in nature and to highlight both the strong as well as the weak areas of your bid.

The Authority is entitled to correct or change the award regardless of the fact that the tenderers have been informed about the award. The award is thus not binding on the Authority prior to the signing of the corresponding procurement contracts. The tenderers are in case the award is corrected or changed not entitled to any damages or other compensation, except to the extent such right nevertheless follows from mandatory provisions of law.

Acceptance

The updated SILVER_06 Framework Agreement Call-off Contract Phase 2 (sections 3,4,5) of the Framework agreement will be sent out in two copies for signature to the tenderers awarded the contracts. The two copies should be returned to the Authority as soon as possible.

Complaints procedure

Please note that the Technology Strategy Board is unable to enter any further discussion with regards to feedback relating to this project. If you would like to raise a concern with regards to your bid please refer to the complaints section of the website <https://www.innovateuk.org/complaints>

Data Protection and Recording of Complaints

As a public body we have a duty to record and track any complaints we receive. This requires us to keep information concerning complaints and to evaluate our responses in order to improve our services. Information about complaints will be stored on our electronic data storage systems but access will be restricted to staff dealing with the complaint and our professional advisors. Personal information is stored in accordance with The Data Protection Act.

Yours sincerely,

Competitions Team

Technology Strategy Board

On behalf and in the name of the group of SILVER contracting authorities

Tel: 0300 321 4357

Email: competitions@innovateuk.org

SILVER_19. SILVER End of phase report Phase 2

1. Details	
Type of Organisation:	Please Select One Private sector, Public sector, Academic, Not for profit (third sector)
Registered Name of Organisation:	
Registered Address:	
Town/ City:	
Postcode:	
County:	
Country:	
Report Author:	
Telephone Number:	
E-mail Address:	
Project Reference:	xxxx_XXXX
Report Type:	Phase 2,
Total Contract Cost in euros	
Start Date:	
End Date:	
Sub-contractors:	

2. At the outset of this piece of work, what were your aims and objectives?

3. Please provide a summary off the outputs of this piece of work and relate these to the original objectives. How do the outputs address the requirements of this PCP?

4. Describe any changes to the original plan in the tender. What was the reason for these changes? Please include any circumstances that aided or impeded the progress of the project and the actions taken to overcome them.

5. Please provide a short factual summary of the most significant outcomes of your work.

6. Describe the innovative aspects of the work, including any new findings or techniques.

7. Describe where the R&D and other operational activities have been performed.

8. Please provide complete and clear information about the allocation of monies paid by the Authority with consideration to the R&D service contract minimum requirement (that more than 50% of the contract value is attributable directly and exclusively to legitimate R&D services)

9. Describe any potential long-term collaborations/ partnerships entered into. Please list the organisation/s and the role they played in the project.

10. Please describe how your organisation has gained from this project. What new business opportunities have been created? Do you expect your organisation to grow as a result of this project?

11. Describe the potential for exploiting the work. Please identify any new intellectual property which has been filed or for which filing is anticipated.

Question 12 only to be answered for report on Phase 1:

12. Describe the suitability of the project results for: (a) developing a prototype, and (b) development of test series – in order to facilitate assessments of progress into next phase.

Question 13 only to be answered for report on Phase 2:

13. Describe the suitability of the project results for developing test series – in order to facilitate assessments of progress into next phase.

14. Please insert additional information that may be pertinent. This may be in the form of text, pictures, diagrams, data, graphs that support the work.

15. Describe what ethical aspects you have identified and how this may influence your solution.

	Unit price	Quantity	Quoted price (€)	Total Price (€)
Labour Price				
1.				
2.				
3.				
4.				
5.				
6.				
Materials				
Capital Equipment				
Sub Contract				
Travel and accommodation				
Other (specify)				
TOTAL PRICE (excluding VAT)				
TOTAL PRICE (including VAT)*				

Annexes

At the end of Phase 2 the following items are updated and attached to this End of Phase report:

- a (technical) specification of the product or a description of the service
- a test protocol
- a production plan (plan for the implementation of the service)
- technical documentation
- the updated business plan.