

**AL Joint Programme, Call 5**  
**ICT-based Solutions for (Self-) Management of Daily Life**  
**Activities of Older Adults at Home**

***Consortium Agreement***

|   |                  |
|---|------------------|
| <b>Project acronym:</b>   | YouDo            |
| <b>Project full title:</b>  | YouDo – we help! |
| <b>Date of preparation of Description of Work (latest version):</b> | 24.02.2014       |

| <b>List of Beneficiaries</b> |   |                               |                |                           |                          |
|------------------------------|---|-------------------------------|----------------|---------------------------|--------------------------|
| <b>Beneficiary Number</b>    | <b>Beneficiary name</b>   | <b>Beneficiary short name</b> | <b>Country</b> | <b>Date enter project</b> | <b>Date exit project</b> |
| 1<br>(coordinator)           | b-mobile GmbH   | BMOB                          | Switzerland    | Month 1                   | Month 36                 |
| 2                            | AIT Austrian Institute of Technology GmbH<br>(Health & Environment Department)                | AIT                           | Austria        | Month 1                   | Month 36                 |
| 3                            | Quantos Group   | QG                            | Switzerland    | Month 1                   | Month 36                 |
| 4                            | Procult Consulting GmbH   | PC                            | Switzerland    | Month 1                   | Month 36                 |
| 5                            | Fachhochschule Vorarlberg   | FHV                           | Austria        | Month 1                   | Month 36                 |
| 6                            | Lucerne University of Applied Sciences and Arts – Engineering & Architecture, CEESAR-iHomeLab | HSLU                          | Switzerland    | Month 1                   | Month 36                 |
| 7                            | Diakonie München-Moosach e.V.   | DMM                           | Germany        | Month 1                   | Month 36                 |
| 8                            | Meditrainment GmbH  | MED                           | Germany        | Month 1                   | Month 36                 |

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### History

| Version | Date       | Changes                           | From | Review |
|---------|------------|-----------------------------------|------|--------|
| 0.1     | 08.01.2012 | Proposal for Consortium Agreement | HSLU | BMOB   |
| 0.2     | 11.01.2012 | Proposal for Consortium Agreement | BMOB |        |
| 0.3     | 26.11.2013 | Proposal for Consortium Agreement | BMOB |        |
| 0.4     | 24.02.2014 | Proposal for Consortium Agreement | BMOB | ALL    |

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**THIS CONSORTIUM AGREEMENT is based upon**

THIS CONSORTIUM AGREEMENT is based upon Decision No 742/2008/EC of the European Parliament and of the Council of 9 July 2008 on the Community's participation in a research and development programme undertaken by several Member States aimed at enhancing the quality of life of older people through the use of new information and communication technologies, hereinafter referred to as the Basic Act, General Agreement No. 30-CE-00228962/00-54 with its Annex: "Detailed arrangements for the AAL Joint Programme", Call for Proposals AAL-2012-5, bilateral agreements between Ambient Assisted Living Association and State Secretariat for Education, Research and Innovation SERI(Switzerland), Federal Ministry for Transport, Innovation and Technology (Austria) andVDI/VDE Innovation + Technik GmbH (Germany), hereinafter referred to as Administrative Agreements, bilateral agreements between Federal Office for Professional Education and Technology (Switzerland), Federal Ministry for Transport, Innovation and Technology (Austria), VDI/VDE Innovation + Technik GmbH (Germany)and b-mobile GmbH, AIT Austrian Institute of Technology, Quantos GroupAG,Procult Consulting GmbH, Fachhochschule Vorarlberg, Lucerne University of Applied Sciences and Arts – Engineering & Architecture, CEESAR-iHomeLab,Diakonie München-Moosach e.V., Meditrainment GmbH, hereinafter referred to as Grant Agreements and follows the Intellectual Property Rights regime, on the basis of the REGULATION (EC) No 1906/2006 OF THE EUROPEAN PARLIAMENT AND OF THE COUNCIL of 18 December 2006 laying down the rules for the participation of undertakings, research centres and universities in actions under the Seventh Framework Programme and for the dissemination of research results (2007-2013), hereinafter referred to as the Rules for Participation and is made on December 01<sup>st</sup>, 2013, hereinafter referred to as the Effective Date.

BETWEEN:

**b-mobile GmbH**

the Coordinator

hereinafter referred to as "BMOB"

**AIT Austrian Institute of Technology GmbH**

hereinafter referred to as "AIT"

**Quantos Group AG**

hereinafter referred to as "QG"

**Procult Consulting GmbH**

hereinafter referred to as "PC"

**Fachhochschule Vorarlberg**

hereinafter referred to as "FHV"

**Lucerne University of Applied Sciences and Arts – Engineering & Architecture,  
CEESAR-iHomeLab**

hereinafter referred to as "HSLU"

**Diakonie München-Moosach e.V.**

hereinafter referred to as "DMM"

**Meditrainment GmbH**

hereinafter referred to as "MED"

hereinafter, jointly or individually, referred to as “Parties” or “Party” relating to the Project entitled

**YouDo – we help!**

in short

**YouDo**

hereinafter referred to as “Project”.

WHEREAS:

The Parties, having considerable experience in the field concerned, have submitted a proposal for the Project to the Ambient Assisted Living Joint Programme under the funding scheme AAL Joint Programme, Call 5 (AAL-2012-5), and wish to specify or supplement binding commitments among themselves in addition to the provisions of the relevant Grant Agreement(s).

The Parties are aware that this Consortium Agreement is based upon the DESCAs model consortium agreement and that explanations to the DESCAs model are available at [www.DESCA-FP7.eu](http://www.DESCA-FP7.eu).

NOW, THEREFORE, IT IS HEREBY AGREED AS FOLLOWS:

## Section 1: Definitions

### 1.1 Definitions

Words beginning with a capital letter shall have the meaning defined either herein or in the relevant Grant Agreements including its Annexes without the need to replicate said terms herein.

### 1.2 Additional Definitions

|   |  |
|---|--|
| <i>Access Rights</i>                            | means licences and user rights to Foreground or Background.  |
| <i>Application Programming Interface or API</i> | <i>means the application programming interface materials and related documentation containing all data and information to allow skilled Software developers to create Software interfaces that interface or interact with other specified Software.</i>  |
| <i>Background</i>                               | <i>means information which is held by a Party prior to its accession to this agreement, as well as the intellectual property rights pertaining to such information, including the application that has been filed before its accession to this agreement, which is needed for carrying out the Project or for using Foreground.</i>  |
| <i>Consortium Budget</i>                        | <i>means the allocation of all the resources in cash or in kind for the activities as defined in the Description of Work (DoW) and in the Consortium Plan thereafter</i>   |
| <i>Consortium Plan</i>                          | <i>means the description of work and the related agreed Consortium Budget as updated and approved by the Project Coordination Committee.</i>   |
| <i>Controlled Licence Terms</i>                 | <i>means terms in any licence that require that the use, copying, modification and/or distribution of Software or another work (“Work”) and/or of any work that is a modified version of or is a derivative work of such Work (in each case, “Derivative Work”) be subject, in whole or in part, to one or more of the following:</i><br>- <i>(where the Work or Derivative Work is Software) that</i> |

|  |  |
|--|--|
|  | <p><i>the Source Code or other formats preferred for modification be made available as of right to any third party on request, whether royalty-free or not;</i></p> <ul style="list-style-type: none"> <li>- <i>that permission to create modified versions or derivative works of the Work or Derivative Work be granted to any third party;</i></li> <li>- <i>that a royalty-free licence relating to the Work or Derivative Work be granted to any third party.</i></li> </ul> <p><i>For the avoidance of doubt, any Software licence that merely permits (but does not require any of) the things mentioned in (a) to (c) is not a Controlled Licence (and so is an Uncontrolled Licence).</i></p> |
| <i>Defaulting Party</i>                    | <i>means a Party which the Project Coordination Committee has identified to be in breach of this Consortium Agreement and/or the relevant Grant Agreement as specified in Article 4.2 of this Consortium Agreement.</i>  |
| <i>Dissemination</i>                       | <i>means disclosure of Foreground by any appropriate means other than that resulting from the formalities for protecting it, and including the publication and presentation of Foreground in any medium.</i>   |
| <i>Fair and reasonable conditions</i>      | <i>means appropriate conditions including possible financial terms taking into account the specific circumstances of the request for access, for example the actual or potential value of the Foreground or Background to which access is requested and/or the scope, duration or other characteristics of the Use envisaged.</i>  |
| <i>Force Majeure</i>                       | <i>means any unforeseeable and exceptional event affecting the fulfilment of any obligation under this Consortium Agreement by the parties, which is beyond their control and cannot be overcome despite their reasonable endeavours. Any default of a product or service or delays in making them available for the purpose of performing this Consortium Agreement and affecting such performance, including, for instance, anomalies in the functioning or performance of such product or service, labour disputes, strikes or financial difficulties do not constitute Force Majeure.</i>  |
| <i>Foreground</i>                          | <i>means the tangible and intangible results which are generated under the project, including pieces of information, materials and knowledge and whether or not they can be protected. It includes intellectual property rights (e.g. copyrights, industrial designs, patents, plant variety rights), similar forms of protection (e.g. rights for databases) and know how or trade secrets (e.g. confidential information).</i>   |
| <i>Grant Agreement</i>                     | <i>means the contract between a Party and its National Funding Administration.</i>   |
| <i>Intellectual Property Rights or IPR</i> | <i>means patents, patent applications and other statutory rights in inventions; copyrights (including without limitation copyrights in Software); registered design rights, applications for registered design rights, unregistered design rights and other statutory rights in designs; and other similar or equivalent forms of statutory protection, wherever in the world arising or available; but excluding rights in Confidential Information or trade secrets.</i>   |
| <i>IPR Directory</i>                       | <i>means a data summary that provides an overview over all Background to which a Party will grant Access Rights, Side ground, and all Foreground developed within the Project. Besides giving an ownership overview as well as an overview of the nature of knowledge, possibilities for dissemination and</i>   |

|                               |   |
|-------------------------------|---|
|                               | <i>exploitation the IPR Directory shall also include the currently agreed status of every item concerning access rights of the intellectual property. The Foreground which is open source software shall also include the licensing model of the open source software.</i>  |
| <i>Lead NFA</i>               | means National Contact Point of the project coordinator   |
| <i>Needed</i>                 | <p><i>means:</i></p> <p><i>For the implementation of the Project: Access Rights are Needed if, without the grant of such Access Rights, carrying out the tasks assigned to the recipient Party would be impossible, significantly delayed, or require significant additional financial or human resources.</i></p> <p><i>For Use of own Foreground:</i></p> <p><i>Access Rights are Needed if, without the grant of such Access Rights, the Use of own Foreground would be technically or legally impossible.</i></p> |
| <i>NFA</i>                    | means National Funding Authority  |
| <i>Object Code</i>            | means software in machine-readable, compiled and/or executable form including, but not limited to, byte code form and in form of machine-readable libraries used for linking procedures and functions to other software.  |
| <i>Proposal</i>               | <i>means the Proposal for this project submitted to the call for proposals of the AAL Joint Programme, dated the 30. June 2011 and being an integral part of this Consortium Agreement.</i>   |
| <i>Software</i>               | <i>means sequences of instructions to carry out a process in, or convertible into, a form executable by a computer and fixed in any tangible medium of expression</i>   |
| <i>Software Documentation</i> | means software information, being technical information used, or useful in, or relating to the design, development, use or maintenance of any version of a software programme.  |
| <i>Source Code</i>            | means software in human readable form normally used to make modifications to it including, but not limited to, comments and procedural code such as job control language and scripts to control compilation and installation.   |
| <i>Use</i>                    | <i>means the direct or indirect utilisation of Foreground in further research activities other than those covered by the Project, or for developing, creating and marketing a product or process, or for creating and providing a service.</i>  |

## Section 2: Purpose

The purpose of this Consortium Agreement is to specify with respect to the Project the relationship among the Parties, in particular concerning the organisation of the work between the Parties, the management of the Project and the rights and obligations of the Parties concerning inter alia liability, Access Rights and dispute resolution.

## Section 3: Entry into force, duration and termination

### 3.1 Entry into force

An entity becomes a Party to this Consortium Agreement upon signature of this Consortium Agreement by a duly authorised representative.

This Consortium Agreement shall have effect from the Effective Date identified at the beginning of this Consortium Agreement.

A new Party enters the Consortium upon signature of the accession document (attached hereto as Attachment 3) by the new Party and the Coordinator. Such accession shall have effect from the date identified in the accession document.

### **3.2 Duration and termination**

This Consortium Agreement shall continue in full force and effect until complete fulfillment of all obligations undertaken by the Parties under the relevant Grant Agreement(s) and under this Consortium Agreement.

However, this Consortium Agreement or the participation of one or more Parties to it may be terminated before the complete fulfillment of all obligations undertaken by the Parties under the GAs and under this Consortium Agreement in accordance with the specific terms of this Consortium Agreement and GAs.

If the Commission does not award the Grant Agreement(s) or terminates the Grant Agreement(s) or a Party's participation in the Grant Agreement(s), this Consortium Agreement shall automatically terminate in respect of the affected Party/ies, subject to the provisions surviving the expiration or termination under Art. 3.3 of this Consortium Agreement.

### **3.3 Survival of rights and obligations**

The provisions relating to IPR, Access Rights and Confidentiality, for the time period mentioned therein, as well as for Liability, Applicable law and Settlement of disputes shall survive the expiration or termination of this Consortium Agreement.

Termination shall not affect any rights or obligations of a Party – except a Defaulting Party - leaving the Consortium incurred prior to the date of termination, unless otherwise agreed between the Steering Committee and the leaving Party. This includes the obligation to provide all input, deliverables and documents for the period of its participation.

## **Section 4: Responsibilities of Parties**

### **4.1 General principles**

Each Party undertakes to take part in the efficient implementation of the Project, and to cooperate, perform and fulfil, promptly and on time, all of its obligations under the relevant Grant Agreements and this Consortium Agreement as may be reasonably required from it and in a manner of good faith as prescribed by Swiss law.

Each Party undertakes to notify promptly, in accordance with the governance structure of the Project, any significant information, fact, problem or delay likely to affect the Project.

Each Party shall promptly provide all information reasonably required by a Consortium Body or by the Coordinator to carry out its tasks.

Each Party shall take reasonable measures to ensure the accuracy of any information or materials it supplies to the other Parties under the relevant Grant Agreement(s) and this Consortium Agreement and promptly to correct any error in such information or materials of which it is notified or of which it becomes aware.

### **4.2 Breach**



In the event a responsible Consortium Body identifies a breach by a Party of its obligations under this Consortium Agreement or the relevant Grant Agreement(s) (e.g.: a partner producing poor quality work), the Coordinator or the Party appointed by the Steering Committee if the Coordinator is in breach of its obligations under this Consortium Agreement or the relevant Grant Agreement(s) will give written notice to such Party requiring that such breach be remedied within 30 calendar days.

If such breach is substantial and is not remedied within that period or is not capable of remedy, the Steering Committee may decide to declare the Party to be a Defaulting Party and to decide on the consequences thereof which may include termination of its participation in the Project.

### **4.3 Involvement of third parties**

A Party that enters into a subcontract or otherwise involves third parties (including but not limited to Third Parties) in the Project remains solely responsible for carrying out its relevant part of the Project and for such third party's compliance with the provisions of this Consortium Agreement and of the relevant Grant Agreement(s). It has to ensure that the involvement of third parties does not affect the rights and obligations of the other Parties under this Consortium Agreement and the relevant Grant Agreement(s).

## **Section 5: Liability towards each other**

### **5.1 No warranties**

In respect of any information or materials (incl. Foreground and Background) supplied by one Party to another under the Project, no warranty or representation of any kind is made, given or implied as to the sufficiency or fitness for purpose nor as to the absence of any infringement of any proprietary rights of third parties.

Therefore,

- the recipient Party shall in all cases be entirely and solely liable for the use to which it puts such information and materials, and
- no Party granting Access Rights shall be liable in case of infringement of proprietary rights of a third party resulting from any other Party (or its Affiliates) exercising its Access Rights.

### **5.2 Limitations of contractual liability**

No Party shall be responsible to any other Party for any indirect or consequential loss or similar damage such as, but not limited to, loss of profit, loss of revenue or loss of contracts, provided such damage was not caused by a wilful act or by a breach of confidentiality.

A Party's aggregate liability towards the other Parties collectively shall be limited to once the Party's share of the total costs of the Project as identified in the Description of Work (DoW) provided such damage was not caused by a wilful act or gross negligence.

The terms of this Consortium Agreement shall not be construed to amend or limit any Party's statutory liability.

### **5.3 Damage caused to third parties**

Each Party shall be solely liable for any loss, damage or injury to third parties resulting from the performance of the said Party's obligations by it or on its behalf under this Consortium Agreement or from its use of Foreground or Background.



## **5.4 Force Majeure**

No Party shall be considered to be in breach of this Consortium Agreement if such breach is caused by Force Majeure. Each Party will notify the competent Consortium Bodies of any Force Majeure without undue delay. If the consequences of Force Majeure for the Project are not overcome within 6 weeks after such notification, the transfer of tasks - if any - shall be decided by the competent Consortium Bodies.

## **Section 6: Governance structure**

### **6.1 General structure**

The Steering Committee is the decision-making body of the Consortium.

The Coordinator is the legal entity acting as the intermediary between the Parties and the European Commission. The Coordinator shall, in addition to its responsibilities as a Party, perform the tasks assigned to it as described in this Consortium Agreement. The Advisory Board, working group layer and work package layer perform the tasks as it is described in the Description of Work.

### **6.2 Members**

The Steering Committee shall consist of one representative of each Party (hereinafter referred to as "Member").

Each Member shall be deemed to be duly authorised to deliberate, negotiate and decide on all matters listed in Article 6.3.6 of this Consortium Agreement.

The Coordinator shall chair all meetings of the Project Coordination Committee, unless decided otherwise by the Project Coordination Committee.

The Parties agree to abide by all decisions of the Project Coordination Committee. This does not prevent the Parties from submitting a dispute for resolution in accordance with the provisions of settlement of disputes in Article 11.8 of this Consortium Agreement.

### **6.3 Operational procedures for the Project Coordination Committee**

#### **6.3.1 Representation in meetings**

Any Member:

- should be present or represented at any meeting;
- may appoint a substitute or a proxy to attend and vote at any meeting;
- and shall participate in a cooperative manner in the meetings.

#### **6.3.2 Preparation and organisation of meetings**

6.3.2.1 Convening meetings:

The chairperson shall convene ordinary meetings of the Steering Committee at least twice a year and shall also convene extraordinary meetings at any time upon written request of any Member.

6.3.2.2 Notice of a meeting:

The chairperson shall give notice in writing (including e-mail) of a meeting to each Member as soon as possible and no later than 14 calendar days preceding an ordinary meeting and 7 calendar days preceding an extraordinary meeting.

#### 6.3.2.3 Sending the agenda:

The chairperson shall send each Member a written original agenda no later than 10 calendar days preceding the meeting, or 5 calendar days before an extraordinary meeting.

#### 6.3.2.4 Adding agenda items:

Any agenda item requiring a decision by the Members must be identified as such on the agenda. Any Member may add an item to the original agenda by written notification to all of the other Members no later than 5 calendar days preceding the meeting.

6.3.2.5 During a meeting of the Steering Committee the Members present or represented can unanimously agree to add a new item to the original agenda.

6.3.2.6 Any decision may also be taken without a meeting if the chairperson circulates to all Members a written document which is then agreed (including e-mail) by the defined majority of Members (see Article 6.3.3 of this Consortium Agreement).

6.3.2.7 Meetings of the Steering Committee may also be held by teleconference or other telecommunication means.

6.3.2.8 Decisions will only be binding once the relevant part of the minutes has been accepted according to Article 6.3.5 of this Consortium Agreement.

### **6.3.3 Voting rules and quorum**

6.3.3.1 The Steering Committee shall not deliberate and decide validly unless two-thirds (2/3) of its Members are present or represented (quorum).

6.3.3.2 Each Member shall have one vote.

6.3.3.3 Defaulting Parties may not vote.

6.3.3.4 Decisions will be taken by consensus or by simple majority in the case where consensus is not possible. Changes to the work-plan will require consensus or a majority of two-thirds (2/3) of the votes.

### **6.3.4 Veto rights**

6.3.4.1 A Member which can show that its own work, time for performance, costs, liabilities, intellectual property rights or other legitimate interests would be severely affected by a decision of the Steering Committee may exercise a veto with respect to the corresponding decision or relevant part of the decision.

6.3.4.2 When the decision is foreseen on the original agenda, a Member may veto such a decision during the meeting only.

6.3.4.3 When a decision has been taken on a new item added to the agenda before or during the meeting, a Member may veto such decision during the meeting and within 10 calendar days after the draft minutes of the meeting are sent.

6.3.4.4 In case of exercise of veto, the Members shall make every effort to resolve the matter which occasioned the veto to the general satisfaction of all Members.

6.3.4.5 A Party may not veto decisions relating to its identification as a Defaulting Party. The Defaulting Party may not veto decisions relating to its participation and termination in the Consortium or the consequences of them.

6.3.4.6 A Party requesting to leave the Consortium may not veto decisions relating thereto.

### **6.3.5 Minutes of meetings**

6.3.5.1 The chairperson shall produce written minutes of each meeting which shall be the formal record of all decisions taken. He shall send draft minutes to all Members within 10 calendar days of the meeting.

6.3.5.2 The minutes shall be considered as accepted if, within 10 calendar days from sending, no Member has objected in writing to the chairperson with respect to the accuracy of the draft of the minutes.

6.3.5.3 The chairperson shall send the accepted minutes to all the Members of the Project Coordination Committee, and to the Coordinator, who shall safeguard them. If requested the Coordinator shall provide authenticated duplicates to Parties.

### **6.3.6 Decisions of the Project Coordination Committee**

The Steering Committee shall be free to act on its own initiative to formulate proposals and take decisions in accordance with the procedures set out herein.

The following decisions shall be taken by the Project Coordination Committee:

Content, finances and intellectual property rights

- Proposals for changes to the Description of Work (DoW) to be agreed by the Lead NFA
- Changes to the Consortium Plan (including the Consortium Budget)
- Withdrawals from Attachment 1 (Background included)
- Additions to Attachment 2 (Background excluded)
- Additions to Attachment 4 (List of Third Parties)

Evolution of the Consortium

- Entry of a new Party to the Consortium and approval of the settlement on the conditions of the accession of such a new Party
- Withdrawal of a Party from the Consortium and the approval of the settlement on the conditions of the withdrawal
- Declaration of a Party to be a Defaulting Party
- Remedies to be performed by a Defaulting Party
- Termination of a Defaulting Party's participation in the Consortium and measures relating thereto
- Proposal to the involved NFAs for a change of the Coordinator
- Proposal to the involved NFAs for suspension of all or part of the Project
- Proposal to the involved NFAs for termination of the Project and the Consortium Agreement

In the case of abolished tasks as a result of a decision of the Project Coordination Committee, Members shall rearrange the tasks of the Parties concerned. Such rearrangement shall take into consideration the legitimate commitments taken prior to the decisions, which cannot be cancelled.

## 6.4 Coordinator

**6.4.1** The Coordinator shall be the intermediary between the Parties and the Lead NFA and shall perform all tasks assigned to it as described in the Grant Agreement(s) and this Consortium Agreement.

**6.4.2** In particular, the Coordinator shall be responsible for:

- Monitoring compliance by the Parties with their obligations
- Keeping the address list of Members and other contact persons updated and available
- Collecting, reviewing and submitting information on the progress of the Project and reports and other deliverables (including financial statements and related certification) to the European Commission
- Preparing the meetings, proposing decisions and preparing the agenda of Steering Committee meetings, chairing the meetings, preparing the minutes of the meetings and monitoring the implementation of decisions taken at meetings
- Transmitting promptly documents and information connected with the Project
- Providing, upon request, the Parties with official copies of documents which are in the sole possession of the Coordinator when such copies or originals are necessary for the Parties to present claims.

**6.4.3** If the Coordinator fails in its coordination tasks, the Steering Committee may propose to the Lead NFA to change the Coordinator.

**6.4.4** The Coordinator shall not be entitled to act or to make legally binding declarations on behalf of any other Party.

**6.4.5** The Coordinator shall not enlarge its role beyond the tasks specified in this Consortium Agreement.

## 6.5 External Expert Advisory Board (EEAB)

An External Expert Advisory Board (EEAB) will be appointed and steered by the Executive Board. The EEAB shall assist and facilitate the decisions made by the General Assembly. The members of the EEAB are required to sign a non-disclosure agreement no later than 30 days after their nomination or before any confidential information will be exchanged, whichever date is earlier. The Coordinator shall write the minutes of the EEAB meetings and prepare the implementation of the EEAB's suggestions. The EEAB members shall be allowed to participate in General Assembly meetings upon invitation but have not any voting rights.

## Section 7: Financial provisions

### 7.1 General Principles

#### 7.1.1 Distribution of Financial Contribution

The financial contribution of the Union and the individual participating countries will be distributed by the responsible NFA in each country as agreed in individual Grant Agreements.

#### 7.1.2 Justifying Costs

In accordance with its own usual accounting and management principles and practices, each Party shall be solely responsible for justifying its costs with respect to the Project towards the

responsible NFA. Neither the Coordinator nor any of the other Parties shall be in any way liable or responsible for such justification of costs towards the responsible NFA.

## 7.2 Budgeting

The Consortium Budget shall be valued in accordance with the usual accounting and management principles and practices of the respective Parties. The financial provisions concerning this Consortium including the Consortium Budget are subject to the Consortium Plan.

## Section 8: Foreground

### 8.1 General Provisions

The *Parties* agree to respect their individual *Background*. All *Background* remains in the ownership of each Party providing the *Background*.

*Foreground* shall be owned by the Party who carried out the work generating the *Foreground*, or on whose behalf such work was carried out.

### 8.2 Joint ownership

If, in the course of carrying out work on the *Project* Foreground is generated and more than one *Party* is contributor to it and if the features of such Foreground are such that it is not possible to separate them for the purpose of applying for, obtaining and/or maintaining the relevant patent protection or any other IPR protecting or available to protect such Foreground, the Parties concerned agree that, subject as expressly provided to the contrary, all patents and other registered IPRs issued thereon, and any other IPRs protecting such Foreground, shall be jointly owned on a proportional base by the Parties concerned. If no agreement can be reached between the concerned Parties on account to the proportion of the joint invention it shall by default be equal between the concerned Parties.

The Parties concerned shall seek to agree amongst themselves arrangements for applying for, obtaining, licensing and/or maintaining such right on a case-by-case basis through the conclusion of a co-ownership agreement. As long as no such agreement has been reached following regulation is applicable:

- each of the joint owners shall be entitled to Use their jointly owned Foreground for research purpose only on a royalty-free basis, and without requiring the prior consent of the other joint owner(s), and
- each of the joint owners shall be entitled to commercial Use and/or grant non-exclusive licenses to third parties, without any right to sub-license, subject to the following conditions: at least 45 days prior notice must be given to the other joint owner(s); and fair and reasonable compensation must be provided to the other joint owner(s).

### 8.3. Application for a Patent

A Party can notify the other Parties via the Coordinator, if it does not intend to seek adequate and effective protection of certain of its Foreground from the Project or if that Party intends to waive such protection. For the avoidance of doubt, there shall be no obligation whatsoever in this respect to notify the other Parties via the Co-ordinator.

If another Party (or Parties) informs the notifying Party as well as the Co-ordinator in writing within one calendar month of such notice that it wishes to obtain or maintain such protection, the notifying Party shall assign to such other Party(ies) all necessary rights which it owns.

Such assignment shall ensure that the Access-rights of all Parties will be unaffected. For the avoidance of doubt, the Party which assigned its rights shall have at least the same Access-rights as the non-involved Parties.

## **8.4 Transfer of Foreground**

8.4.1 Each Party may transfer ownership of its own Foreground following the procedures of the individual National Agreements.

8.4.2 It may identify specific third parties it intends to transfer the ownership of its Foreground to in Attachment (4) to this Consortium Agreement. The other Parties hereby waive their right to object to a transfer to listed third parties according to the individual National Agreements.

8.4.3 The transferring Party shall, however, notify the other Parties of such transfer and shall ensure that the rights of the other Parties will not be affected by such transfer. Any addition to Attachment (4) after signature of this Agreement requires a decision of the Project Coordination Committee.

8.4.4 The Parties recognize that in the framework of a merger or an acquisition of an important part of its assets, a Party may be subject to confidentiality obligations which prevent it from giving the full 45 days prior notice for the transfer as foreseen in the individual National Agreements.

## **8.5 Dissemination**

### **8.5.1 Publication of a Party's own Foreground or Background**

8.5.1.1 Dissemination activities including but not restricted to publications and presentations shall be governed by the procedure of individual National Agreements subject to the following provisions.

Prior notice of any planned publication shall be given to the other Parties concerned at least 45 days before the publication. Any objection to the planned publication shall be made in accordance with the GA in writing to the Coordinator and to any Party concerned within 7 days after receipt of the notice. If no objection is made within the time limit stated above, the publication is permitted.

8.5.1.2 An objection is justified if

- a) the objecting Party's legitimate academic or commercial interests are compromised by the publication; or
- b) the protection of the objecting Party's Foreground or Background is adversely affected.

The objection has to include a precise request for necessary modifications.

8.5.1.3 If an objection has been raised the involved Parties shall discuss how to overcome the justified grounds for the objection on a timely basis (for example by amendment to the planned publication and/or by protecting information before publication) and the objecting Party shall not unreasonably continue the opposition if appropriate actions are performed following the discussion.

### **8.5.2 Publication of another Party's Foreground or Background**

For the avoidance of doubt, a Party shall not publish Foreground or Background of another Party, even if such Foreground or Background is amalgamated with the Party's Foreground,

without the other Party's prior written approval. For the avoidance of doubt, the mere absence of an objection according to 8.1 is not considered as an approval.

### **8.5.3 Cooperation obligations**

The Parties undertake to cooperate to allow the timely submission, examination, publication and defence of any dissertation or thesis for a degree which includes their Foreground or Background subject to the confidentiality and publication provisions agreed in this Consortium Agreement.

### **8.5.4 Use of names, logos or trademarks**

Nothing in this Consortium Agreement shall be construed as conferring rights to use in advertising, publicity or otherwise the name of the Parties or any of their logos or trademarks without their prior written approval.

## **Section 9: Access Rights**

### **9.1 Background covered**

9.1.1 The Parties shall identify in the Attachment 1 the Background to which they are ready to grant Access Rights, subject to the provisions of this Consortium Agreement, and the Grant Agreement(s). Such identification may be done by e.g.

- subject matter and possibly in addition by
- naming a specific department of a Party.

9.1.2 The owning Party may add further Background to Attachment 1 during the Project by written notice. However, only the Steering Committee can permit a Party to withdraw any of its Background from Attachment 1.

9.1.3 The Parties agree that all Background not listed in Attachment 1 shall be explicitly excluded from Access Rights. The Parties agree, however, to negotiate in good faith additions to Attachment 1 if a Party asks them to do so and those are needed. For the avoidance of doubt, the owner is under no obligation to agree to additions of his Background to Attachment 1.

9.1.4 In addition, if a Party wishes to list specific Background as excluded, it shall identify such Background in the Attachment 2. The owning Party may withdraw any of its Background from Attachment 2 during the Project by written notice. However, only the Steering Committee can permit a Party to add Background to Attachment 2.

### **9.2 General Principles**

9.2.1 Each Party shall implement its tasks in accordance with the Consortium Plan and shall bear sole responsibility for ensuring that its acts within the Project do not knowingly infringe third party property rights.

9.2.2 Parties shall inform the Consortium as soon as possible of any limitation to the granting of Access Rights to Background or of any other restriction which might substantially affect the granting of Access Rights (e.g. the use of open source code software in the Project).

9.2.3 If the Steering Committee considers that the restrictions have such impact, which is not foreseen in the Consortium Plan, it may decide to update the Consortium Plan accordingly.



9.2.4 Any Access Rights granted expressly exclude any rights to sublicense unless expressly stated otherwise.

Access Rights shall be free of any administrative transfer costs.

Access Rights are granted on a non-exclusive basis, if not otherwise agreed in writing by all the Parties according to the individual National Agreements.

9.2.5 Foreground and Background shall be used only for the purposes for which Access Rights to it have been granted.

9.2.6 All requests for Access Rights shall be made in writing.

The granting of Access Rights may be made conditional on the acceptance of specific conditions aimed at ensuring that these rights will be used only for the intended purpose and that appropriate confidentiality obligations are in place.

9.2.7 The requesting Party must show that the Access Rights are needed.

### **9.3 Access Rights for implementation**

Access Rights to Foreground and Background needed for the performance of the own work of a Party under the Project shall be granted on a royalty-free basis, unless otherwise agreed for Background in Attachment 1.

### **9.4 Access Rights for Use**

9.4.1 Access Rights to Foreground if Needed for Use of a Party's own Foreground including for third-party research shall be granted on Fair and Reasonable conditions.

Access rights for internal research activities shall be granted on a royalty-free basis.

9.4.2 Access Rights to Background if Needed for Use of a Party's own Foreground shall be granted on Fair and Reasonable conditions.

9.4.3 A request for Access Rights may be made up to twelve months after the end of the Project or, in the case of Art. 9.7.2.1.2, after the termination of the requesting Party's participation in the Project.

### **9.5 Access Rights for Third Parties**

Third Parties have Access Rights under the conditions of this Consortium Agreement.

Such Access Rights to Third Parties shall be granted on Fair and Reasonable conditions and upon written bilateral agreement.

Third Parties which obtain Access Rights in return grant Access Rights to all Parties and fulfil all confidentiality and other obligations accepted by the Parties of this Consortium Agreement as if such Third Parties were Parties.

Access Rights may be refused to Third parties if such granting is contrary to the legitimate interests of the Party which owns the Background or the Foreground.

Access Rights granted to any Third party are subject to the continuation of the Access Rights of the Party to which it is affiliated, and shall automatically terminate upon termination of the Access Rights granted to such Party.

Upon cessation of the status as an Third party, any Access Rights granted to such formerThird party shall lapse. Further arrangements with Third Parties may be negotiated in separate agreements.

## **9.6 Additional Access Rights**

The Parties agree to negotiate in good faith any additional Access Rights to Foreground as might be asked for by any Party, upon adequate financial conditions to be agreed.

## **9.7 Access Rights for Parties entering or leaving the Consortium**

### **9.7.1 New Parties entering the Consortium**

All Foreground developed before the accession of the new Party shall be considered to be Background with regard to said new Party.

### **9.7.2 Parties leaving the Consortium**

#### **9.7.2.1 Access Rights granted to a leaving Party**

##### **9.7.2.1.1 Defaulting Party**

Access Rights granted to a Defaulting Party and such Party's right to request Access Rights shall cease immediately upon receipt by the Defaulting Party of the formal notice of the decision of the Steering Committeeto terminate its participation in the Consortium.

##### **9.7.2.1.2 Non-defaulting Party**

A non-defaulting Party leaving voluntarily and with the other Parties' consent shall have Access Rights to the Foreground developed until the date of the termination of its participation. It may request Access Rights within the period of time specified in Art. 9.4.3.

#### **9.7.2.2 Access Rights to be granted by any leaving Party**

Any Party leaving the Project shall continue to grant Access Rights pursuant to Grant Agreement(s) and this Consortium Agreement as if it had remained a Party for the whole duration of the Project.

## **9.8 Specific Provisions for Access Rights to Software**

### **9.8.1. General principles**

For the avoidance of doubt, the general provisions for Access Rights provided for in this Section 9 are applicable also to Software as far as not modified by this Article 9.8.

Parties' Access Rights to Software do not include any right to receive Source Code or Object Code ported to a certain hardware platform or any right to receive Source Code, Object Code or respective Software Documentation in any particular form or detail, but only as available from the Party granting the Access Rights.

The intended introduction of Intellectual Property Rights (including, but not limited to Software) under Controlled Licence Terms in the Project requires the approval of the Steering Committeeto implement such introduction into the Consortium Plan.

### **9.8.2. Access to Software**

Access Rights to Software which is Foreground shall comprise:

- Access to the Object Code; and,
- where normal use of such an Object Code requires an Application Programming Interface (hereafter API), Access to the Object Code and such an API; and,
- if a Party can show that the execution of its tasks under the Project or the Use of its own Foreground is technically or legally impossible without Access to the Source Code, Access to the Source Code to the extent necessary.

Background shall only be provided in Object Code unless otherwise agreed between the Parties concerned.

### **9.8.3 Software licence and sublicensing rights**

#### **9.8.3.1 Object Code**

##### **9.8.3.1.1 Foreground - Rights of a Party**

Where a Party has Access Rights to Object Code and/or API which is Foreground for Use, such Access shall, in addition to the access for Use foreseen in Article 9.4, as far as needed for the Use of the Party's own Foreground, comprise the right:

- to make an unlimited number of copies of Object Code and API; and
- to distribute, make available, market, sell and offer for sale such Object Code and API alone or part of or in connection with products or services of the Party having the Access Rights;

Provided however that any product, process or service has been developed by the Party having the Access Rights in accordance with its rights to use Object Code and API for its own Foreground.

If it is intended to use the services of a third party for the purposes of this Article 9.8.3.1.1, the Parties concerned shall agree on the terms thereof with due observance of the interests of the Party granting the Access Rights as set out in Article 9.1 of this Consortium Agreement.

##### **9.8.3.1.2 Foreground - Rights to grant sublicenses to end-users**

In addition, Access Rights to Object Code shall, as far as Needed for the Use of the Party's own Foreground, comprise the right to grant in the normal course of the relevant trade to end-user customers buying/using the product/services, a sublicense to the extent as necessary for the normal use of the relevant product or service to use the Object Code alone or as part of or in connection with or integrated into products and services of the Party having the Access Rights and, as far as technically essential:

- to maintain such product/service;
- to create for its own end-use interacting interoperable software in accordance with the Council Directive of 14 May 1991 on the legal protection of computer programs (91/250/EEC).

##### **9.8.3.1.3 Background**

For the avoidance of doubt, where a Party has Access Rights to Object Code and/or API which is Background for Use, Access Rights exclude the right to sublicense. Such sublicensing rights may, however, be negotiated between the Parties.

#### **9.8.3.2 Source Code**

##### **9.8.3.2.1 Foreground - Rights of a Party**

Where, in accordance with Article 9.8.3, a Party has Access Rights to Source Code which is Foreground for Use, Access Rights to such Source Code, as far as Needed for the Use of the Party's own Foreground, shall comprise a worldwide right to use, to make copies, to

modify, to develop, to adapt Source Code for research, to create/market a product/process and to create/provide a service.

If it is intended to use the services of a third party for the purposes of this Article 9.8.3.2.1, the Parties shall agree on the terms thereof, with due observance of the interests of the Party granting the Access Rights as set out in Article 9.1 of this Consortium Agreement.

#### 9.8.3.2.2 Foreground – Rights to grant sublicenses to end-users

In addition, Access Rights, as far as Needed for the Use of the Party's own Foreground, shall comprise the right to sublicense such Source Code, but solely for purpose of adaptation, error correction, maintenance and/or support of the Software.

Further sublicensing of Source Code is explicitly excluded.

#### 9.8.3.2.3 Background

For the avoidance of doubt, where a Party has Access Rights to Source Code which is Background for Use, Access Rights exclude the right to sublicense. Such sublicensing rights may, however, be negotiated between the Parties.

#### 9.8.4 Specific formalities

Each sublicense granted according to the provisions of Article 9.8.3 shall be made by a traceable agreement specifying and protecting the proprietary rights of the Party or Parties concerned.

#### 9.9. IPR Directory

The Parties shall identify in the IPR Directory the Background to which they are ready to grant Access Rights, subject to the provisions of this Consortium Agreement. Such identification may be done by e.g.

- subject matter and possibly in addition by ;
- positive list naming a specific department of a Party to which Background the Party will grant Access Rights or
- negative list naming the Background to which a Party will not grant Access Rights to.

The IPR Directory containing the Background listed at the start of the Project shall be included to the Consortium Agreement as Annex III.

The owning Party may add further Background, Sideground and Foreground to the IPR Directory during the Project by written notice. However, only the Executive Board can permit a Party to withdraw any of its Background from the IPR Directory

The Parties agree that all Background not listed positively in the IPR Directory shall be explicitly excluded from Access Rights as well as Background not listed negatively shall be explicitly included from Access Rights. The Parties agree, however, to negotiate in good faith additions to IPR Directory if a Party asks them to do so and those are needed.

For the avoidance of doubt, the owner is under no obligation to agree to additions of his Background to IPR Directory.

Each Party undertakes to inform the PC of the Foreground created during the Project and include the Foreground to the IPR Directory.

#### 9.10 Open Source Software

##### 9.10.1 Usage of Open Source Software

Parties using open source software and providing other Parties through deliverables or access rights access to such software shall inform the other Parties through the attachment of the open source licensing agreement of its rights and obligation when using the open source Software.

## **Section 10: Non-disclosure of information / Confidentiality / Privacy**

10.1 All information in whatever form or mode of transmission, which is disclosed by a Party (the “Disclosing Party”) to any other Party (the “Recipient”) in connection with the Project during its implementation and which has been explicitly marked as “confidential”, or when disclosed orally, has been identified as confidential at the time of disclosure and has been confirmed and designated in writing within 15 calendar days from oral disclosure at the latest as confidential information by the Disclosing Party, is “Confidential Information”.

10.2 The Recipients hereby undertake in addition and without prejudice to any commitment of non-disclosure under the Grant Agreement(s) for a period of 5 years after the end of the Project:

- not to use Confidential Information otherwise than for the purpose for which it was disclosed;
- not to disclose Confidential Information to any third party without the prior written consent by the Disclosing Party;
- to ensure that internal distribution of Confidential Information by a Recipient shall take place on a strict need-to-know basis; and
- to return to the Disclosing Party on demand all Confidential Information which has been supplied to or acquired by the Recipients including all copies thereof and to delete all information stored in a machine readable form. If needed for the recording of ongoing obligations, the Recipients may however request to keep a copy for archival purposes only.

10.3 The Recipients shall be responsible for the fulfilment of the above obligations on the part of their employees and shall ensure that their employees remain so obliged, as far as legally possible, during and after the end of the Project and/or after the termination of employment.

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

- the Confidential Information at the time of the disclosure was, or thereafter became publicly available by means other than a breach of the Recipient’s confidentiality obligations;
- the Disclosing Party subsequently informs in writing the Recipient that the Confidential Information is no longer confidential;
- the Confidential Information is communicated to the Recipient without any obligation of confidence by a third party who is in lawful possession thereof and under no obligation of confidence to the Disclosing Party;
- the disclosure or communication of the Confidential Information is foreseen by provisions of the Grant Agreement(s);
- the Confidential Information, at any time, was developed by the Recipient completely independently of any such disclosure by the Disclosing Party; or
- the Confidential Information was already known to the Recipient prior to disclosure as evidenced by written documentation in the files of the Recipient or is not explicitly marked or confirmed as Confidential Information or
- the Recipient is required to disclose the Confidential Information in order to comply with applicable laws or regulations or with a court or administrative order, subject to the provision Art. 10.7 hereunder.

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

10.6 Each Party shall promptly advise the other Party in writing of any unauthorised disclosure, misappropriation or misuse of Confidential Information after it becomes aware of such unauthorised disclosure, misappropriation or misuse.

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

10.8 The confidentiality obligations under this Consortium Agreement shall not prevent the communication of Confidential Information to the European Commission or the NGA's.

10.9 Privacy and control of personal data concerning end-users  
Personal or sensitive data will be handled in accordance with existing national and European legislation and directives. The relevant security and privacy rules regarding storage and transmission of personally identifiable information have to be respected. Data have to be made anonymous, codified and stored in a secure place guaranteeing access only to authorised persons. All collection of data and other interventions in the project should follow the principles of proportionality and purposefulness, i.e. be restricted to what is necessary to meet the aims of the project.

10.10 The exit strategy for the end users of the test environment  
End-users will always have the possibility to resign from the project at any time, without giving a reason and without incurring costs or penalties. YouDois a research project, which means that there is always a certain risk involved, that the idea fails. Therefore, at the beginning of the project, the participants who volunteer to test and validate the products and services will be informed that it maybe possible, that the products and services will be discontinued after the project ends.

#### 10.11 Ethical issues

Each Party is committed to comply with ethical principles in research with human participants in our case with peoplesuffering from various kinds of physical disabilities. This means that they will not be regarded as disabled persons. As stated in the description of work several international and national guidelines on ethical issues are relevant to the Project and will be observed. End-user organisations which are part of the Project take care of these issues as they have the direct contact to real end-users of YouDo's products and services. Additionally, user involvement throughout the Project can contribute to the future adoption of the system in its commercial stage. They explain YouDo's products and services to the client and draft an informed consent that the client has to sign. The informed consent will be designed according to the national rules of the end-user participating countries.

## **Section 11: Miscellaneous**

### **11.1 Attachments, inconsistencies and severability**

This Consortium Agreement consists of this core text and

- Attachment 1 (Background included)
- Attachment 2 (Background excluded)
- Attachment 3 (Accession document)
- Attachment 4 (List of Third Parties)
- Attachment 5 (Initial list of members and other contact)
- Attachment 6 (Description of Work)



In case the terms of this Consortium Agreement are in conflict with the terms of the relevant Grant Agreement(s), the terms of the latter shall prevail. In case of conflicts between the attachments and the core text of this Consortium Agreement, the latter shall prevail. Nothing in this Consortium Agreement shall be laid out as granting or giving a Party or third Party the right to against the EC, NGA or the AAL Association if in conflict with the relevant Grant Agreement(s).

Should any provision of this Consortium Agreement become invalid, illegal or unenforceable, it shall not affect the validity of the remaining provisions of this Consortium Agreement. In such a case, the Parties concerned shall be entitled to request that a valid and practicable provision be negotiated which fulfils the purpose of the original provision.

Amendments or changes to this *Consortium Agreement* shall be valid only if made in writing and signed by an authorised signatory of each of the *Parties*.

## **11.2 No representation, partnership or agency**

The Parties shall not be entitled to act or to make legally binding declarations on behalf of any other Party. Nothing in this Consortium Agreement shall be deemed to constitute a joint venture, agency, partnership, interest grouping or any other kind of formal business grouping or entity between the Parties.

## **11.3 Notices and other communication**

Any notice to be given under this Consortium Agreement shall be in writing to the addresses and recipients as listed in Attachment 5 or to such other address and recipient as a Party may designate in respect of that Party by written notice to the others.

Formal notices:

If it is required in this Consortium Agreement (Article. 9.7.2.1.1 and 11.4) that a formal notice, consent or approval shall be given, such notice shall be signed by an authorised representative of a Party and shall either be served personally or sent by mail with recorded delivery or telefax with receipt acknowledgement.

Other communication:

Other communication between the Parties may also be effected by other means such as e-mail with acknowledgement of receipt, which fulfils the conditions of written form.

Any change of persons or contact details shall be notified immediately by the respective Party to the Coordinator. The address list shall be accessible to all concerned.

## **11.4 Assignment and amendments**

No rights or obligations of the Parties arising from this Consortium Agreement may be assigned or transferred, in whole or in part, to any third party without the other Parties' prior formal approval.

Amendments and modifications to the text of this Consortium Agreement not explicitly listed in Article 6.3.6 require a separate agreement between all Parties.

## **11.5 Mandatory national law**



Nothing in this Consortium Agreement shall be deemed to require a Party to breach any mandatory statutory law under which the Party is operating.

## **11.6 Language**

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

## **11.7 Applicable law**

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

## **11.8 Settlement of disputes**

Should a dispute arise between the Parties concerning the validity, the interpretation and/or the implementation of this Consortium Agreement, they will try to solve it through mediation, according to the WIPO Mediation Rules unless otherwise agreed upon by the Project Coordination Committee. The Parties undertake not to put an end to the mediation before the introductory statement made by each party in joint session.

Should the mediation fail to bring about a full agreement between the Parties putting an end to the dispute, said dispute will be finally settled by the jurisdiction of the competent court in Brussels. Such court shall have jurisdiction in the event of a counterclaim made by the defendant in the legal action.

Notwithstanding the foregoing, any Party shall be free to seek interim injunctive relief or any other temporary measures before any applicable competent court or tribunal, wherever located, in order to seek to prevent or restrain any (i) infringement of its or their IPRs and/or (ii) unauthorised disclosure of Confidential Information.



## Section 12: Signatures

This *Consortium Agreement* may be executed in any number of counterparts, each which shall be deemed an original, but all of which shall constitute one and the same instrument.

AS WITNESS:

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

### **b-mobile GmbH**

Signature(s)  
Name(s)            Thomas Bugal  
Title(s)

Date

### **AIT AUSTRIAN INSTITUTE OF TECHNOLOGY GMBH (HEALTH & ENVIRONMENT DEPARTMENT)**

Signature(s)  
Name(s)  
Title(s)

Date



AS WITNESS:

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

**b-mobile GmbH**

Signature(s)  
Name(s)  
Title(s)

Date

**Quantos Group (Schweiz) AG and**

Signature(s)  
Name(s)  
Title(s)

Date



AS WITNESS:

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

**b-mobile GmbH**

Signature(s)  
Name(s)  
Title(s)

Date

**Procult Consulting (Schweiz) GmbH**

Signature(s)  
Name(s)  
Title(s)

Date



AS WITNESS:

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

**b-mobile GmbH**

Signature(s)

Name(s)

Title(s)

Date

**Fachhochschule Vorarlberg**

Signature(s)

Name(s)

Title(s)

Date



AS WITNESS:

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

**b-mobile GmbH**

Signature(s)

Name(s)

Title(s)

Date

**Lucerne University of Applied Sciences and Arts – Engineering & Architecture  
CEESAR-iHomeLab**

Signature(s)

Name(s)

Title(s)

Date

Prof. Alexander Klapproth  
Head of CEESAR-iHomeLab

Prof. Dr. Andrea Weber Marin  
Vice Director  
Head of Research



AS WITNESS:

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

**b-mobile GmbH**

Signature(s)

Name(s)

Title(s)

Date

**Diakonie München-Moosach e.V.**

Signature(s)

Name(s)

Title(s)

Date





AS WITNESS:

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

**b-mobile GmbH**

Signature(s)

Name(s)

Title(s)

Date

**Meditrainment GmbH**

Signature(s)

Name(s)

Title(s)

Date



## **Attachment 1: Background included**

Access Rights to Background made available to the Parties:

This represents the status at the time of signature of this Consortium Agreement.

## Attachment 2: Background excluded

Background excluded from Access Rights:

HSLU: Lucerne University of Applied Sciences and Arts – E&A, CEESAR-iHomeLab, background excluded from Access Rights: Any Background which has been developed by any personnel, scientists or students other than the members of the competence centre CEESAR-iHomeLab; Any Background which is subject to non-disclosure agreements with other third parties; Any Background developed by members of the competence centre CEESAR-iHomeLab, involved in the Project on research topics which are not specifically subject of the Project activities, as described in the Description of Work. Sideground is not considered part of Background, and is explicitly excluded from Access Rights.

AIT:

AIT excludes all Background that has been created by its researchers other than those members of the Business Units Biomedical Systems and Assistive Healthcare Information Technology directly involved in carrying out the project.

AIT also excludes all Background which due to third-parties' rights it is unable to grant Access-rights to.

AIT excludes any background which is held by AIT but owned by a Third Party.

AIT specifically excludes any unpublished work that has been carried out which is not already in the public domain.

This represents the status at the time of signature of this Consortium Agreement.



## Attachment 3: Accession document

ACCESSION

of a new Party to

[Acronym of the Project] Consortium Agreement, version [..., YYYY-MM-DD]

[OFFICIAL NAME OF THE NEW PARTY AS IDENTIFIED IN THE EC-GA]

hereby consents to become a Party to the Consortium Agreement identified above and accepts all the rights and obligations of a Party starting [date].

[OFFICIAL NAME OF THE COORDINATOR AS IDENTIFIED IN THE EC-GA]

hereby certifies that the Consortium has accepted in the meeting held on [date] the accession of [the name of the new Party] to the Consortium starting [date].

This Accession document has been done in 2 originals to be duly signed by the undersigned authorised representatives.

[Date and Place]

[INSERT NAME OF THE NEW PARTY]

Signature(s)

Name(s)

Title(s)

[Date and Place]

[INSERT NAME OF THE COORDINATOR]

Signature(s)

Name(s)

Title(s)



## **Attachment 4: List of Third Parties**

List of Third Parties to which transfer of Foreground is possible with prior notice to the other Parties and for which the other Parties have waived their right to object.

**BMOB:**PrivyTV

**AIT:**

**QG:**

**PC:**

**FHV:**

**HSLU:**none

**DMM:**

**MED:**

## Attachment 5: Initial list of members and other contact persons

Member of the YouDoProject Coordination Committee:

|                     |  |   |                                      |                   |
|---------------------|--|---|--------------------------------------|-------------------|
| Thomas Bugal        | b-mobile GmbH                                      | b-mobile GmbH<br>Gemeindehausweg<br>1 CH-6330 Cham<br>Schweiz   | thomas.bugal@b-<br>mobile.ch         | +417970994<br>67  |
| Christin Weigel     | b-mobile GmbH                                      | b-mobile GmbH<br>Gemeindehausweg<br>1 CH-6330 Cham<br>Schweiz   | christin.weigel@b-<br>mobile.ch      | +417941933<br>83  |
| Daniel Bolliger     | CEESAR-<br>iHomeLab                                | Hochschule Luzern<br>T&A, CEESAR-<br>iHomeLab,<br>Technikumstrasse<br>21, 6048 Horw   | daniel.bolliger@hslu.<br>ch          | +414134939<br>94  |
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## Description of Work (Part B, Call 5)



### YouDo – we help!

**Application areas addressed:** Training & information for informal carers via own TV-Channel or Internet portal, business modelling and low cost service

Proposal full title: YouDo –we help!

Proposal acronym: YouDo

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| 3                | Quantos Group  | QG         | SME      | CH      |
| 4                | Fachhochschule Vorarlberg  | FHV        | Research | AT      |
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| 8                | Meditrainment  | MED        | SME      | DE      |

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## Section 1: Relevance - Ideas and Models

### 1.1 A short summary description of the overall idea and implementation of the proposal in relation to AAL technology and the end-user(s).

The number of people in need of care increases constantly because of the increasing average age and quantity of people with physical limitations, especially in Europe. Also, there is manpower shortage in the care sector, which is more and more in financial straits. This is the reason why very many seniors will depend on their close relatives for the care needs. These people need help in overcoming the difficult challenges they have to face and their problem is a lack of needed knowledge. The first confrontation of relatives with the notion of an intensive support for their family members comes often insidiously (e.g. dementia) or suddenly (e.g. stroke) through changing life circumstances.

But it can also happen through the loss of a partner of the older adult or through the consequences of a fall or developing helplessness against daily life situations. In such situations the relatives need, which search now, mostly unprepared, solutions, orientation and support - especially to analyse their own realistic possibilities and abilities. They should have access to all information that will help them to fulfil their role as informal carers; to all special training programs aimed at improving the quality of their nursing.

The innovation of our idea consists of gathering all the needed content for the top 10 care topics distributed to the informal carer on their personal trusted device (TV-set or computer) – depending on their age and preferences. In a second step we have to research in which way the content could be transformed, so that the end user really understands it. With the Privy TV technologies it is possible to set up own IP-TV-channels and feed them with own content. Our YouDo multimedia portal platforms will contain information and eLearning courses on all the relevant care topic and the users can choose any channel they want. The YouDo portal will have several TV-channels, one for every key care topic. End users can set up an own community channel for certain topics as well. Our idea is, that depending on the personal trusted device (maybe a 72 years old woman will choose the TV-set and the 48 years old man will maybe choose the Internet) the informal carers can decide, how he/she will receive the information. Beside the informal carers also older adults in need of care can use our service, but this is highly depending on the level of care needed.

This solution could be one piece of the “big puzzle”, which supports the ageing society of Europe. It would be one first step, bringing care topics to the TV, so we could reach so much more informal carers and persons in need of care at one go.

### 1.2 An example scenario



Caroline Fargo, 72 years old, was confused as her husband Michael 80, who suffered from dementia for the last couple of months, seemed to feel worse every day. The only son (Jim) of Caroline and Michael lives in another country. Caroline took care of her husband as best as she could but often felt clueless how to help. One day Caroline visited her doctor, who informed her about the new YouDo service, where people could receive appropriate instructions and information about the different care topics on TV or Internet, whatever fits best for them. She was interested and even more surprised, as the doctor proposed her, that he could setup quickly the appropriate YouDo care channel for her. The doctor informed Caroline, that also the son could set it up for her in the Internet. But she was happy to take the offer from the doctor. As she arrived at home, she switched on the TV-set and chose the “Yes” button as the YouDo invitation pop up was shown on the TV screen. She got now a new TV-channel called “YouDo Dementia”. Caroline wondered if it would be possible to find a training session about dementia. She discovered that there were several training sessions available and at 10 a.m. additional information about dementia is provided. She even could interact with other channels and find enormous amount of diverse information. Caroline finds

it very easy to operate with the remote control. She tries to spend more time every day for the training sessions. She can also interactively start her own sessions whenever she has spare time. While being trained, Caroline starts feeling more self-assured in her actions; she feels more competent and protected caring for her husband in need of support. As mentioned by the doctor, the services were free of charge, as the program was sponsored by the government and other sources and Carolyn felt even happier about finding this service. She tries to use the training every day during her spare time and become more competent in caring. The son of Caroline and Michael notices the positive changes in his parents' behaviour and also decides to start the training sessions in YouDo Internet portal and using her Tablet PC. One day Caroline felt uncertain; she felt like the information given in one of the trainings was too complicated. She called the hotline and received a very nicely set response from the professional trainer. They set up an appointment and the instructor explained her everything in details. Furthermore, he gave her some useful instructions for the future. Overall, Caroline felt relief. Finally the help was found and she could feel secure about caring for her beloved.

### **1.3 The aimed service models**

YouDo consists of different product and service components, which will be provided customized for the different target groups. Main target group will be the informal carers, but also the older adults in need of care; interest groups like doctors or formal carers.

#### **Focus of content:**

The way this first approximation of support and care is handled is the key for the process of involvement and healthy sustainment of caring relatives in a professional surrounding. Relatives, who try to orientate help searching, will be thankful to learn from the experiences of others in similar situations and to share their concerns with each other.

Based on these two pillars "YouDo - We help" is a combination of information platform, social network and systematic, sustainable, professional support. Integrated is a learning area where people, in situation of giving first support, are leaded through chosen topics. This could be for example lift and transfer relatives or the handling of tools, information about fall prevention, among many others points. Additionally it is important to keep the needs of the caring relative in focus to give him the courage to handle his own life, despite care, on his own.

Besides the provision of more technical abilities and the 'to be developed' basics, YouDo focuses on the main care topics:

1. Dementia
2. Fall (standard of care fall prevention)
3. Nutrition
4. Pain (pain management standard of care)
5. Pressure ulcers (decubitus standard of care)
6. Incontinence

In a first trial we will focus on the key topic dementia, because our researches showed that there is the biggest need for most of the relatives. We will focus on the recognition and handling of early status of dementia, to support relatives in raising awareness and increasing knowledge. We want to handle the topic dementia as an example for other care topics and the corresponding challenges. This means, we want to use the care topic dementia in order to do the proof of concept for YouDo.

This topic needs a close cooperation of professional medical and psychological support and service offer. We want to create a trustful and sustainable connection of caring relatives and professional service providers and other professional offers, in a really early point. Especially

on the background of supporting the informal carers not just in a technical way, but also to accompany them mentally, help them to grow with their tasks, to create a collegial and trustful supply and care network.

As the person who is closest to the elder, the informal carer has a key and "door supervisor" function, which is crucial for better quality of life of both - the elder and the caregiver.

YouDo addresses therewith two axes:

1. The support of people who slowly drift into care of another person or who are suddenly confronted with this situation.
2. The exchange of experiences, concerns, emotions and success' in a virtual group in a social media way.

YouDo connects and coordinate relatives and professional providers of care and support in a really early state of care. On the one hand to build up a network between caring relatives and on the other hand for a good cooperation to handle the increasing need of support and care.

### **Multimedia Portal:**

The content will be provided to the end customer via different media. Information will be clustered in the relevant care topics (diseases, situations in life, etc.) - one per channel or page.

We want to offer kind of multimedia training material, based on the nowadays classroom trainings, it has to be decided, which part of the training can be transferred via digital media. First estimation is around 90 percent. We will evaluate different kind of eLearning methodology, in order to use the right methodology. We will offer a bunch of various TV series, like documentation films. There will be interviews with relevant stakeholders and experts of the various care topics, which will be shown online and in TV shows. People can call and ask questions or take part in live chats. Content sources will be end user organizations (professional care givers), experts, interest groups and personal concern.

### **Distribution Channels:**

In general we support mainly two digital distribution channels, IP-TV and Internet. The iPad/tablet PC; via Internet (normal standards) connected, a TV-set; via PrivyTV technology connected to the multimedia portal.

The following are the **intended end user values** of the YouDo service: We want to improve the educational level of the informal carer in order to be able to provide a better care job. Additional to that, the older adult in need of care, professional care organisations and doctors belong partially to the target group. Most special is the information structure based in the different care focuses, with the goal to help the carer on each point of his care giving and information status. Older adults will profit from the better educational level of the informal carer and they will learn how to handle situations on their own and how they should behave in daily life. Both will help to unburden the informal carers and will help them to integrate care in their daily life. We will massively improve the reach of training services and information due to electronic media. We will have the possibility to structure existing classroom trainings in a new way and to reach new target groups. So the professional care organisations can restructure the today's mainly classroom services in an online part and a classroom part, where topics which cannot be transported via digital media can be trained in face to face training sessions.

The **perceived end user values** of the YouDo are:

The older adults in need of care feel more safe and convenient, if the caregiver has a better background knowledge in the corresponding care topic. The informal carer can do their caregiver job in a much better way; because they feel more save if they know what they really have to do. So automatically, the stress level of both, the informal carer and the person in need of care will be reduced drastically.

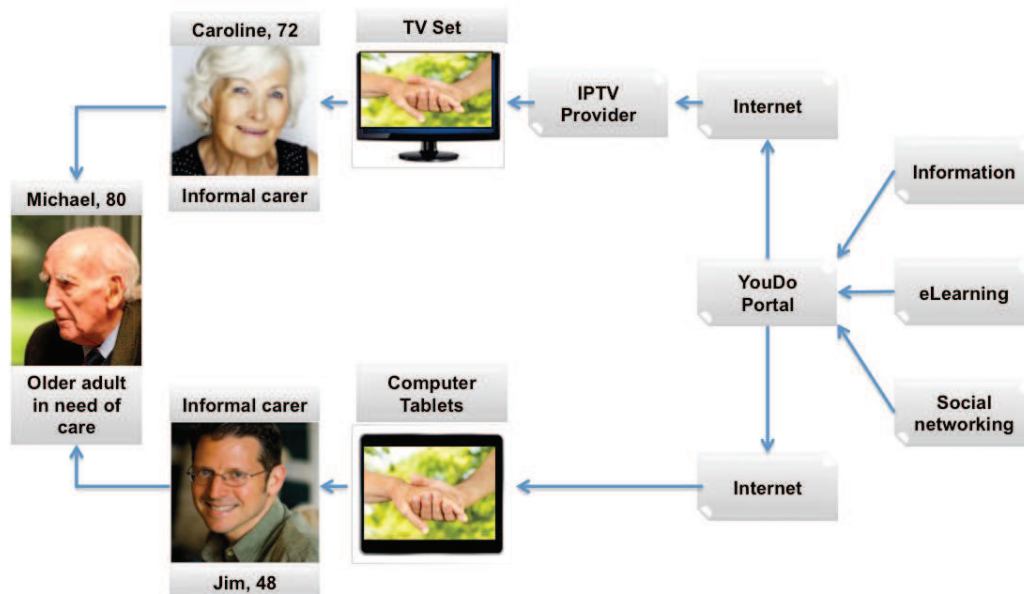


Figure 1: Service Model YouDo

## 1.4 The business case

Our main target segments are informal carers and dependants. Today's situation is based on socio-demographic changes (aging society) and difficult developments in the healthcare market (manpower shortage & financial straits in the care sector). Relatives have to more and more take over the challenge to care for their beloved ones. About 80% of them are women in the age >70, mostly caring for their husbands. They prefer TV to get information and spend a lot of time in watching it. At the beginning of care, they are confronted, in most of the cases, with a lack of knowledge in taking care of relatives correctly.

This is the reason why YouDo has a goal to provide information, education and social networking possibilities mainly for the informal carer, that he/she is able to do the job in a much better way. The older adult gets a much better care service, because the informal carer knows what to do and how to deal with the topics. The value of YouDo is to transfer knowledge and information to the informal carer, which leads to more safety and peace of mind for the caregiver. The elder person in need of care gets a better care service and more confidence in daily life.

YouDo has strategic relevance for the society in Europe. It will be one piece of the puzzle for the support of the aging society.

Today training for informal carer happens, in case it happens at all, face to face in classrooms. In addition, there are several Internet portals to care topics, but no solution, which focuses on the combination – information, online training and social networking. On

top of that, we haven't found anyone, who was setting up own TV channel on the key care topics nationwide.

**Business Model:**

The traditional value chain is a linear association of inputs and outputs that reveals how a company thought of its operations. But healthcare and communication industries have more complex relations between the stakeholders. So the task is to find an intelligent configuration of a stakeholder network as a value-creation system.

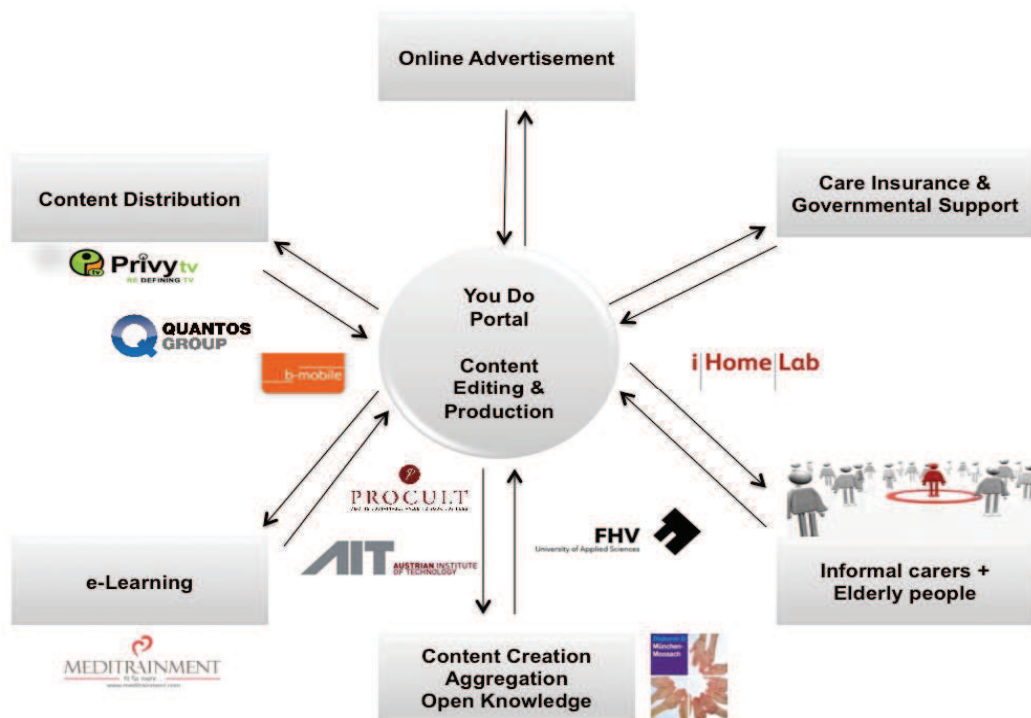


Figure 2: Business Model YouDo

**Stakeholder Analysis:**

The care sector consists of different stakeholders, like care insurances, governmental organisations, end-user organisations, professional care services, etc. All of them are able to deliver a certain part of the content needed in order to build up the YouDo portal or could support us with a certain funding, because YouDo solves partially a challenge of the society. YouDo takes care about content aggregation and content management itself. In order to produce the state of the art online training, one important stakeholder is the eLearning agency. The content distribution is done via Internet or IP-TV using PrivyTV technologies.

In order to design the business case for YouDo, we have to think about the frame conditions first. So as mentioned in chapter 1.1, the aging society, especially in Europe, has not enough professional carers and is challenged with an always-shrinking budget. In general, there is



just one chance that the informal carer takes over a certain part of the work of the professional carer in order to fill the gap.

The service YouDo has the intention, to support the informal carers with tailor-made information, online trainings offers and social networking possibilities in an easy consumable format. At the end, the older adults in need of care will feel the difference.

In the project YouDo, we want to check the following three business models:

1. Service for informal carers for free
2. Service for informal carers for a one-time charge
3. Service for informal carers for a small monthly fee

Based on our customer-oriented service design approach, we will test the three above mentioned business models with customers and all involved stakeholders. This will be, as the service development, an iterative approach.

At the moment, we assume that we should continue with business model 1.

The main driver for that is that the informal carer does a service for his /her relatives but does support also the society, the government and the care insurances in order to save money for partially supporting of professional carers. In general we have to say, that the revenue/financing for the service comes from a mixed business model based on income from care insurance, from online advertisements, which are focused and related to the care topics and from donations. Additional to that, we would reduce the “production costs” using free data sources (open knowledge) or which will be sponsored from professional carers organizations.

Now it is the “art”, how to distribute the generated money in that way, that the YouDo service fulfils what it promised in an appropriate quality and that we can cover the costs and provide a certain margin for every involved stakeholder.

The other two business models (Model 2 and 3) should be checked as well, because also today’s classroom trainings, in order to support informal carers, cost a one-time fee, even if the fee is not very high.

We want to sell YouDo through direct and indirect sales channels.

**Direct sales:** The online channel is an important and low cost sales possibility. You can get a YouDo account directly on our YouDo portal.

**Indirect sales:** The indirect sales will be done over partners, like end-user organizations, with information on flyers and recommendations from the staff. We want to cooperate with retirement homes, outpatient practices and hospitals. Doctors can present YouDo in general or recommend for the patient interesting modules. They should get also the possibility to setup a YouDo TV channel for their patients directly.

Additionally to the YouDo services, we want to provide space on our portal for online advertisement. The advertisement topics will be focused on care topics, like local care trainings or interesting products around the topic care and healthy living.

## 1.5 The exit strategy

The support for the service provided to the informal carers during the trial’s needs to be continued beyond the lifetime of the project. It is planned that – at the project’s exit - Quantos Group with their access to existing IPTV/VOD distribution channels will promote and support the service further; Procult with their access to existing Smart Home solutions will promote and support the services, Meditrainment will offer their services to keep the content up to date and our professional care organization partners Diakonie München-Moosach will offer

“YouDo” in their service portfolio. Also b-mobile with the Subcontractor PrivyTV will make sure, that the services offer will continue.

Participating end users, who wish, will be granted the right to keep the products they have been provided with for testing and evaluation. No end user involved in the project will lose the opportunity of the continued use of any product that has contributed to an improved quality of life for the single individual, as the end users have contributed to the result of the project. Only in the event that the products turn out to constitute a hazard, they will no longer be available for security and safety reasons.

Finally, we need to keep in mind that YouDo is a research project. This means that there is always a certain risk involved, that the idea fails (due to various reasons; see contingency planning 2.6). We will therefore, at the beginning of the project, inform the participants who volunteer to test and validate the service that it may be possible, that it will be discontinued after end of the project.

### 1.6 Success parameters of the proposal

The consortium partners have established a set of the most relevant success criteria, which serve as project milestones. These criteria will also be used as Key Performance Indicators (KPI) for the assessment and self-assessment during the project.

| Criteria                            | Type                             | Description  | Corresponding Milestone |
|-------------------------------------|----------------------------------|--|-------------------------|
| End user requirements and demands   | Quantitative / External validity | End user interviews and enquiries, in order to establish what content is needed and how to provide it.                         | <b>M2</b>               |
| Technical requirement specification | Qualitative                      | Detailed specification of content and technology to be developed.  | <b>M3</b>               |
| Integrated prototype                | Qualitative                      | Successful integration of information and education modules in presentation platforms.   | <b>M6</b>               |
| Internal trials and testing         | Quantitative / Internal validity | Extensive internal testing in order to confirm that YouDo provides the intended functionality and meets the user requirements. | <b>M8</b>               |
| End user trials and testing         | Qualitative / Credibility        | Extensive end user involvement, in order to get feedback on usability of developed system and provided modules.                | <b>M9</b>               |
| Results of end user trials          | Quantitative / External validity | Measuring the result of the end user trials, in order to prove the concept   | <b>M10</b>              |
| Dissemination of the results        | Qualitative / external validity  | Ideas and results will be disseminated via various channels (website, conferences, journals, etc.)                             | <b>M10</b>              |



|                            |          |   |            |
|----------------------------|----------|---|------------|
| Revision of business model | Economic | Evaluation of the project distribution channels used, in order to build a suitable distribution network that increases the success rate of the future business. | <b>M10</b> |
|----------------------------|----------|---|------------|

## 1.7 Ethical and legal issues

Each YouDo partner is committed to comply with ethical principles in research with human participants in our case with older adults in need of care suffering from dementia (care topic for proof of concept for YouDo) even if the main target group is the informal carer and not the person in need of care. This means that elderly will not be regarded as disabled persons. Sensitive data is always transferred through encrypted channels. If the client wants to use the tracking service he/she has to give his/her explicit consent (sign an informed consent). This will be handled by the agreement of the client with the social care institutions.

### 1) Reference to international guidelines:

YouDo will take into account the Charter of Fundamental Rights of the European Commission [8]; several articles of the Charter apply to our project:

- Article 1: Human dignity is inviolable. It must be respected and protected: Each end-user who participates in YouDo and evaluates the developed system is treated with respect.
- Article 7: Everybody has the right to respect for his/her private and family life, home and communications: The data, which are created from the end-user solely, belong to the end-user. YouDo is taking care of this issue.
- Article 8.1: Everybody has the right to the protection of the personal data concerning him or her.
- Article 8.2: Such data must be processed fairly for specified purposes and on the basis of the consent of the person concerned or some other legitimate basis laid down by law.
- Article 8.3: Compliance with these rules shall be subject to control by an independent authority: In YouDo relevant personal data are only given to third persons in emergency situations where the client is at risk.
- Article 25: The Union recognises and respects the rights of the elderly to lead a life of dignity and independence and to participate in social and cultural life: YouDo ensures the independence of elderly people suffering from dementia, for as long as possible. YouDo refers to further guidelines on the European level:
- Data Protection Directive: 95/46/EG of the European parliament, 24th October 1995 which deals with the protection of individuals referring to the processing of personal data and to the free movement of such data.
- Directive on Privacy and Electronic Communication: Directive 2002/58/EG; This Directive focuses on the regulation of issues like confidentiality of information, treatment of traffic data, spam and cookies.

### 2) Reference to national guidelines

The guidelines specified on the European level are implemented on the national level. The development of the YouDo system follows a user-centred approach. This means that the involvement of end-users in the research and development activities of the project is an

important condition for a successful completion of the project. End-user organisations Diakonie München-Moosach and SME Meditrainment, which are part of the project, take care of these issues as they have the direct contact to real end-users of the YouDo system. In order to consider ethical aspects referring to human dignity, protection of privacy and data protection best, the coordinator will be advised by the YouDo Ethical and Privacy workgroup leader. Also within the conduction of the project an intensive contact with the ethic commission is going to be performed. The other project partners of YouDo will also get into contact with the ethical commissions of their country.

**1.7.1 Ethical “declaration” table**

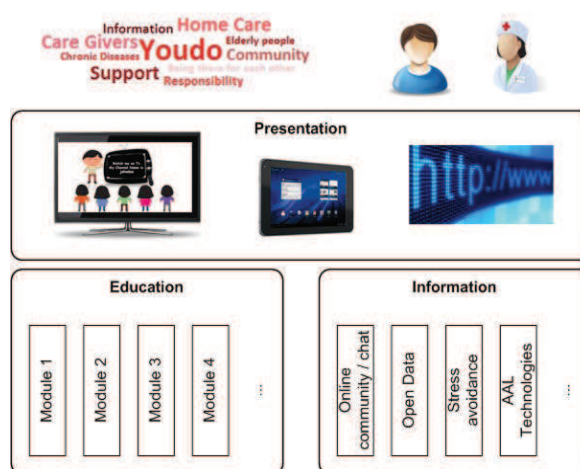
| Ethics declaration of proposals in the AAL-Joint-Programme   | Described on page or “not relevant” |
|--|-------------------------------------|
| • How is the issue of informed consent handled?  | 8,9,10,12,17                        |
| • What procedures does the proposal have to preserve the dignity, autonomy and values (human and professional) of the end-users?   | 8,9                                 |
| • If the proposal includes informal carers (e.g. relatives, friends or volunteers) in the project or in the planned service-model - what procedures exist for dealing with ethical issues in this relationship?  | 8,9                                 |
| • If the proposal includes technology-enabled concepts for confidential communication between the older person and informal and formal carers, service providers and authorities – what procedures are planned for safeguarding the right to privacy, self-determination and other ethical issues in this communication? | 8,9,12,13                           |
| • What "exit" strategy for the end-users involved in the project does the proposal have (in terms of end-users leaving the project during its implementation and after the project's end)?   | 7,8                                 |
| • How are the ethical dimensions of the solution targeted in the proposal taken into account? (Brief description of distributive ethics, sustainability et.al.)  | 8                                   |

**Section 2: Scientific and technological excellence – the project work plan**

**2.1 Technology methodology**

The technologies and services developed in YouDo can be broken down in the areas: Education, Information (incl. Social networking) and Presentation. Each one is described in the following whereas all will be integrated to a single running prototype. The overall idea is depicted in the figure aside.

Content will be generated in cooperation between end user organisations and training experts of the consortium. When more and more topics will be covered through YouDo, there will be an editor group to handle content management. This will be done through one content management system, where all types of media and functions like online community, feedback possibilities, etc. are available.



*Figure 3: Overview YouDo Platform*

### **Education**

One of the main goals of YouDo is the creation of interactive education modules, especially for informal carers to facilitate learning about care. Interactive and/or multimedia-based training material about care (e.g. regarding the topic “How to deal with reduced mobility after a stroke”; easy to understand micro lessons, what are the reasons, 10 tips to facilitate movement, short videos that can motivate the person to work on him/herself.).

A main component of the educational part will follow the concept of psycho education, to inform and teach informal careers about the care topics and its treatment in daily life. Through psycho education the informal carers can better understand the most important facts about the disease, which led to a care situation, and the necessary treatment measures, which will help them to be able to deal with the situation. Through the loss of cognitive abilities the illness not only requires a daily care but has also a big impact on their social life. Parts of the educational modules therefore will cover not only educational modules but also social learning components and communication tools. Due to the heterogeneity of the user group this will be provided through a variety of rich media units and modules. According to the current state of educational technology and social learning, the online portal will provide structured learning path as well as interactive learning modules, self-learning paths, video tutorials, collaborative learning units, feedback tools, etc. The online portal will facilitate individual learning environments by providing every user a personal variety of digital tools and applications – e.g. mobile phone, mp3 player, online calendars, twitter, and Google services to manage a seamless integration into daily life.

### **Information**

Information for and experience exchange between informal carers and between carers in general are important tools to support the physical and mental care ability of the carer including preventing psychological stress. Thus these topics are crucial when thinking about supporting systems for carers and are therefore realized in YouDo as follows:

- An active exchange between (in)formal carers will be created by means of an online community tool and regular chats, which are intended to be used by informal and professional carers and assisted persons to provide fast help, professional companionship and most important a permanent exchange regarding concerns and experiences (informal carers <--> assisted persons <--> formal carers).
- Information where carers and assisted persons can get help and support in the local district will be integrated in YouDo, since it is important to know where to get support in the neighbourhood. The idea of Open Data (e.g. Vienna Open Data) is evolving and thus it is planned to integrate relevant data sets provided by e.g. the government and accessible by the public. This will be realized by means of services with APIs to the data repositories.
- Information for carers how to avoid getting stressed on their own will be integrated in the information modules as well. It is important to support the informal carers in an early stage to decrease psychological stress and thus to avoid effects, such as burn out.
- Information which AAL Technologies exist that can be used to support the assisted person and informal carer will be integrated as well to create the awareness that technical products can be used to reduce the efforts for the informal carers and thus to facilitate time management and increase time for social interaction.
- In YouDo it is planned to create the possibility to suggest training and information material based on new situations (case management) by doctors and formal caregivers. This can be important to avoid overburdening of informal carers when their beloved ones get additional handicaps, diseases, needs, etc.

## Presentation

For the presentation of the education and information modules various ways are planned. The primary output device will be the TV by means of the “YouDo care channels”, since informal carers belong often to the same generation as the assisted persons and nowadays



the TV is still the main medium for information gain for older adults. This fact will change in the future since the next generation will be much more adapted to the technologies and thus a realization not just on the TV but by means of an Internet platform and services for mobile devices are intended. These different platforms will be created in a way that users can easily and at all-time swap between technologies. In the following the intended output channels are described in more detail:

- TV (IP TV, PrivyTV channel): The TV presentation will be different to classical channels in public TV. Sound, writing and other factors will

be adapted to the needs of old adults. Through this medium we will present the content in live elements (to give the carer the possibility to answer questions e.g. via phone) and videos structured by the

Figure 4: PrivyTV Architecture Overview

knowledge status of the carer.

- Internet platform: For the group of digital natives though the portal must provide an open and personalized environment offering all social media components for a seamless integration of digital tools and applications into daily life, e.g. social networks, mobile apps, etc. The Internet platform will be based on a classic eLearning platform such as "Moodle". This is an object oriented course management system, a learning platform on open source basis. The software offers the possibility to support cooperative teaching and learning methods. To be modified to the needs of the target groups it is crucial that the platform is based on open source code development.
- Mobile devices: The older adult's affinity towards technology and especially mobile devices (smart phones, tablet PCs, iPads, etc.) will increase in the next years. In the younger generation these devices are already widespread. The use of thus mobile devices will still rise in the close future. We will create interfaces to access the education and information content and to participate in the information exchange. Those developments will be based on experiences and results gained in the project AALuis, which is coordinated by AIT, to ensure accessibility and adaptability based on user's needs and preferences.

## 2.2 Resources (expertise, infrastructure, etc.) needed

To achieve its objectives the YouDo consortium draws upon a broad range of scientific, technical and market expertise, as shown in the following figure.

|                                    | BMOB | AIT | QG | FHV | HSLU | PC | DMM | MED |
|------------------------------------|------|-----|----|-----|------|----|-----|-----|
| Project Management                 | ++   | +   | ++ |     | ++   | ++ |     |     |
| Requirements Engineering           | ++   | +   | ++ | ++  | +    | +  |     |     |
| Contact End-User                   |      |     |    | ++  | +    |    | ++  | ++  |
| Development of Educational Modules |      |     |    |     |      |    |     | ++  |
| Content for Educational Modules    |      |     |    |     |      |    | ++  | ++  |
| Content for Information Modules    |      | +   |    |     |      |    | ++  | ++  |
| Output TV                          | ++   |     | ++ |     | +    |    |     |     |
| Portal Platform                    |      | ++  | ++ |     | +    | +  |     | ++  |
| Output Mobile Devices              |      | ++  | ++ |     | ++   | +  |     |     |
| User Interaction                   | +    | +   | ++ |     | +    | +  |     |     |
| Evaluation & Trials                | +    | +   | +  | ++  | ++   | ++ |     |     |
| Dissemination                      | +    | ++  | ++ |     | ++   | ++ |     |     |
| Exploitation and Business Planning | ++   |     | ++ |     |      | +  |     |     |

The project depends on the one hand side of the understanding of the most relevant care topics like e.g. dementia or fall protection prophylaxis and on the other hand the understanding of the needs and wishes of persons in need of care and of the informal carer. This requires expertise in the field of: professional care, medicine, psychology, sociology, education, qualitative and quantitative market research, and quality control.

Secondly, we have to think about, which content (information and training) can be distributed over digital media and how do we transfer the content, which is there in different format (on paper, electronic format etc.) into digital multimedia format. Additionally to that, we need expertise in the area of eLearning, in order to produce state of the art training material as well as knowledge in editing and production of content.

The third challenge is to make the technology as simple, so that the end-users can easily handle it. For technology development following expertise is needed: user interface design, client-server design, software and application development, WEB-Design, Content processing knowledge, mathematics, mobile communication and IP TV knowledge.

Last but not least the field trials must be well managed and conducted to maximize the impact of YouDo. To accomplish this, customer survey expertise, project management expertise, expertise in technology validation, quality management and marketing expertise is required. The consortium brings together, this mix of expertise for the implementation of YouDo value proposition.

## 2.3 The perspective of the end-users

YouDo will profoundly involve users in the requirements analysis, the usability engineering and evaluation tasks in Germany. DMM is in close contact with informal carers through their (complimentary) advisory and training services. Therefore they are able to acquire end-users (older adults and informal carers) needed for trials and whole user centred design

process of the project by means of stimulating their individually concerns in private care of older adults. The end-users will be involved to investigate the users' needs and wishes addressed to the project objectives.

In general, all user involvements will be on a voluntary basis, and the users will receive appropriate information on the use of their personal data. In cooperation with the user organisations we will invite elderly users to participate. The participants of the user studies will be provided with information flyers in language easy to read containing the aims of the study, and an overview of the tasks expected during the trial session. We will inform the participants about all relevant aspects of the trial that might reasonably be expected to influence their decision to participate. Furthermore, informed written consent (easy to read) by the participants will be the requirement for all evaluations. Volunteers will be informed of at least the following:

- Purpose and expected duration of the study.
- Potential risks (if any) and benefits of participating in the study.
- Which data will be collected in the study, in particular data directly related to the volunteer, and to what degrees (and how) confidentiality of such data will be ensured.
- Who will be in charge of storing the collected data and who will have access to it?
- What kind of processing will be performed with then collected data and for how long will the collected data be maintained?
- Contact persons for the study, who can answer any questions the participant may have.

Participants will also be informed that participation is entirely voluntary. Those who do not wish to give their consent will not be included in any studies. The information will be available to these participants in the local languages used (German). All participants will be supervised during trials and no procedures or content will be used that might be expected to cause physical or psychological discomfort. A debriefing will be conducted to allow the participants to comment on any aspect of the trials that they consider relevant. In table underneath you can see the minimal number of users involved in the different project phases.

| <b>Project phase</b>                | <b>Aim</b>   | <b>Number of users (Older adults and informal carers)</b> |
|-------------------------------------|--|---|
| WP2 Requirements                    | Identifying needs, personas, needed content, preferred learning modalities, etc.                 | 10-15   |
| WP4 Education & Information Modules | Analysis and specification of education and information modules                                  | 10-15   |
| WP5 Internal Pilot                  | Evaluation of user interfaces, services, acceptance, identification of improvement possibilities | 10-20   |



|                  |  |       |
|------------------|--|-------|
| WP5 Field Trials | Final evaluation of the system with external users | 30-50 |
|------------------|--|-------|

## 2.4 The Intellectual Property Rights management (IPR) of the project and beyond. Are there any other legal issues within the project?

In accordance with the FP7 rules for participation (Regulation (EC) No 1906/2006 of the European Parliament and of the Council of 18.12.2006) and the Grant Agreement all affairs concerning dissemination, access rights and use of knowledge and intellectual property will be covered in the

Consortium Agreement. It is intended to be based on the DESCAs model. A key tool for the knowledge management will be an IPR Directory, which is intended to give an overview over all background the project or its results are based upon and all foreground developed within the project. It will be maintained throughout the lifetime of the project by the Executive Board and serves as a basis to prevent conflicts and to ease business planning. The Parties agree to respect their individual Background. All Background remains in the ownership of each Party providing the Background. Foreground shall be owned by the Party who carried out the work generating the Foreground, or on whose behalf it was carried out.

## 2.5 Work plan (organisation of the project)

The YouDo work plan consists of 6 work packages. The related tasks are distributed over the duration of 36 months. In order to reduce risks, we have planned an iterative development approach including two major development cycles as shown on Figure 5. We clustered the plan in the following phases:

**Initiation:** The project starts with an initiation phase (WP1, WP2). During this phase, the kick-off workshop will be scheduled, the administrative framework is set up, the ethical manual and the quality plan are created and the risk management tools are up and running.

**Requirements:** In parallel to the project initiation phase, the requirements engineering phase starts (WP2) involving end users and the other stakeholders in order to understand and cluster needs of corresponding personas. Based on that, use cases will be written, which are the foundation of the business and technical requirements.

**Platform specification, design, development, integration and E2E-test:** After analysing all technical platforms and (sub-) systems, an overall system architecture will be designed (WP 3). We will use an iterative development approach with short development cycles (sprints) in order to do the implementation. The circle arrow indicates those short cycles each producing increment of a service that can already be presented and tested on its own. We will have two major releases going two end user tests as well. Every major release will be integrated with all the relevant (sub-) systems. The first complete prototype (including content) will be ready in month 17 and is first tested in the lab. After integration is done, a technical E2E-test will validate the quality of the YouDo system.

**Content editing & production:** After analysing and prioritising (from a medical, social and economical point of view) of all relevant training and information material for the care topic Dementia (topic for the YouDo proof of concept), the multimedia content will be specified and produced (information and online trainings, in text, videos and multimedia format) (WP4). After editing and production of the content, the quality will be validated in a test cycle.

**Pilot Trials:** The first requirements for the trials and its environment (WP5) have been collected at the beginning of the project to make sure the development teams know already early what will be produced in the end. We have planned two pilot cycles, first one with "internal" customers (a smaller group of "friendly" users) starting in month 22. The second trial cycle will start in month 32 and will be focused on external customer. The two-step-approach will reduce risk.

**Business Plan:** The business plan development (WP6) takes place in 3 phases, the first draft is focused on market inputs and business modelling and just a rough estimation on costs, in a second phase, the real costs will be adapted based on the learning's from the technical development phase. The third and final phase takes especially the learning's from end customer trials into account and the better knowledge of the cost and revenue situation.

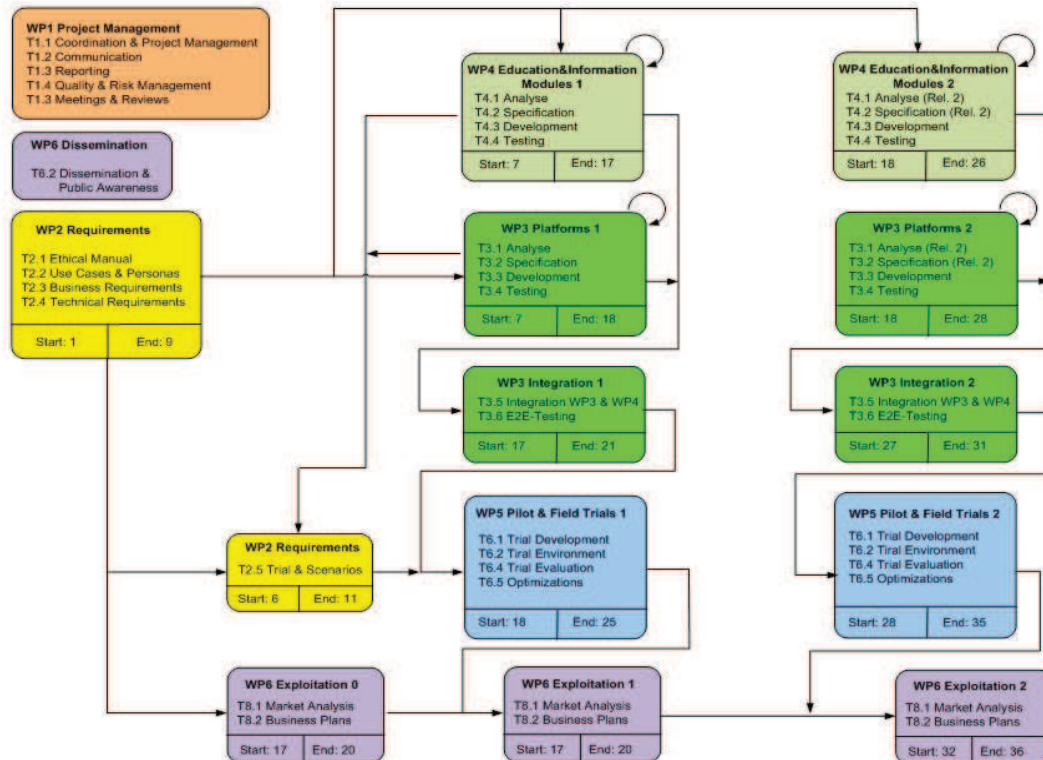


Figure 5: Project Plan (Pert Chart)

### Project Quality Management

The YouDo work plan considers internal and external quality measures based on reviews, continuous user feedback, regular project meetings, documentation guidelines and the consequent usage of our customer oriented development processes. At the heart of all those measures stands the project's quality plan, which contains all relevant information related to the quality management in the lifetime of YouDo. The coordinator (BMOB) creates the plan during the initiation phase of the project and will act as quality manager (QM).

### Risk Management

The coordinator will create and maintain a risk management tool for the project and leads the risk lessening activities. Each project member has the obligation to identify and communicate risks as soon as they pop up in their responsible work areas soon enough in order to be prevented. Please find in chapter 2.6 the risk table and contingency plan reflecting the actual status.

## 2.6 Contingency plan

The project implementation plan produced at the beginning of the project will be revised during the course of the project. One of the main reasons that project re-planning is deemed necessary is as a result of regular risk assessment in the project. The initial list of risks



presented here is for starting that process and should be regularly updated based on experiences in the project. As a general prevention mechanism the project progress will be continuously monitored in order to detect and react early to any problems that may occur.

| <b>Risk</b>   | <b>Probability/Consequence</b>   | <b>Prevention</b>  | <b>Contingency Plan</b>   |
|---|--|--|---|
| <b><i>Technical and Scientific Risks</i></b>                                    |  |  |   |
| Difficulties and delays in development of prototype.                            | Probability: Low<br>Consequence: Cause delay in system integration.  | Control of work progress; detailed and clear definition of requirements.                         | Reduce functionalities of prototype. Focus on key features, one at a time.  |
| Difficulties in system integration.   | Probability: Low<br>Consequence: Cause delay in pilot trials.  | Detailed and clear definition of interfaces; following definitions.                              | Quick adaptation of modules and reduction of functionality  |
| Objectives cannot be realized.  | Probability: Low<br>Consequence: Project goals at risk.  | Continual collaboration with specialists.  | Change of functionality of system.  |
| Insights contrary to proposed aims arise.                                       | Probability: Low<br>Consequence: Project goals change.   | Continual collaboration with specialists.  | Adaptation of project goals.  |
| <b><i>Management Risks</i></b>  |  |  |   |
| Lack of resources and/or staff changes forced upon the project by the partners. | Probability: Low<br>Consequence: The quality of the outcome of the project might decrease as it depends on having access to qualified resources. | Good level of communication to talk about rising problems; good overview of project coordinator. | Raise the issues urgently with management in partner organisations. In consultation with the CMU, replace partners that are not delivering. |
| Partner quitting the project.   | Probability: Low<br>Consequences: The quality of the outcome of the project might decrease as it depends on having access to know-how.           | See above.   | Try to find adequate replacement. If not possible, try to distribute resources within consortium.   |
| <b><i>Ethical Risks</i></b>   |  |  |   |

|  |  |  |   |
|--|--|--|---|
| Participants of trials withdraw consent. | Probability: Medium<br>Consequences: Delays in trials. Worst case: no data.    | Very good preparation, communication to and information of participants.         | Recruitment of new trial participants.  |
| Problems with authorization.             | Probability: Low<br>Consequences: Pilot/Field trials. Worst case: no data.     | Very good preparation of trials; paying early attention; experience of partners. | Re-definition and re-planning of proposed trials.                                   |
| Privacy of data                          | Probability: Low<br>Consequences: Privacy data will be called by unauthorized. | The newest security communication standards will be used.                        | Stop global communication and fix of the problems.<br>Setup of a local environment. |

## 2.7 Pilot application

The planned pilot carries out realistic trials with selected end users and demonstrates the project results to a broad audience. The work plan contains tasks for executing user trials and conducting the pilot, as well as an in-depth evaluation of the deliverables both in terms of technology and end users.

To demonstrate and proof the concept, a complete YouDo system has to be built and deployed as a prototype installation at 3 end user sites (DMM D and MED D). The sites will finally be connected resulting in one comprehensive pilot study (see also chapter 2.3).

We plan and execute two bigger trials in the course of the project. Both strongly involve about 20 informal carers at each of the three 3 trial sites. Before the start of each trial phase, trainers of the participating end-user organisations will be instructed in the use of the system. The trainers will teach the use of the system to the people participating as end users in the trials. The end-user partners will recruit therefore each about 20 people in their country, which act as informal carers in the tests. They are responsible for informing them in detail about the research and the trial. End-users involved in the trial have to sign the YouDo informed consent for the specific country.

As for the infrastructural deployment, there are two alternatives:

- a) The IP-TV provider integrates the software required to enable the interactive YouDo content directly into his IPTV-platform. On the one hand, this integration is quite delicate, as the provider needs to touch the core of his platform. On the other hand no additional hardware (set-top box) is needed besides of the IPTV capable TV.
- b) The solution is built into a set-top box that needs to be deployed and installed at every end user site. The hardware needed is a commercial off-the-shelf solution, which means that it would be available for the trials as soon as the server service side is ready.

Whereas for the end product, solution a) is preferred due to its simplicity for the end user, the pilot will probably be based on mixed environment (a & b based on the rollout scheduler for PrivyTV in the different EU countries). But the set-top box approach b) is always possible and enables us to start testing as soon as possible.

Step-by-step, the project will develop and build-up a controlled environment running a special trial framework with the goal to evaluate the platform and the new services in a comprehensive way. Establishing a controlled environment - using instrumented software applications running on a central back end server - is one of the key prerequisites to demonstrate the full range of project objectives as such an environment gives full control to the designers of the trials.

The solution will be evaluated qualitatively as well as quantitatively. The table below lists possible evaluation criteria for the trials (to be extended):

| Qualitative Evaluation Criteria  | Quantitative Evaluation Criteria (per user)  |
|--|--|
| <ul style="list-style-type: none"> <li>- Subjective sense of being fully informed about the care activities concerning the person to be cared</li> <li>- Simplicity and level of understanding of the possibilities and the use of the system</li> <li>- Subjective impression of the helpfulness of the system and fulfilling personal needs</li> <li>- Sense of confidence and certainty in self-management of private care activities</li> <li>- Extent of social inclusion and participation in supportive social networks</li> <li>- Acceptance among technophile and technophobe people</li> </ul> | <ul style="list-style-type: none"> <li>- Number of times the system was consulted</li> <li>- Number of channels to where people have registered</li> <li>- Time that was spent on the platform</li> <li>- Type of information that was accessed</li> <li>- Number of (I)ADL supported per day</li> </ul> |

The qualitative criteria will be evaluated using guided interviews. The quantitative measures will be collected via detailed logs, which will be recorded during the trials by the trial framework explained above. In the first field trial the entire system will be tested. Therefore all components have to be implemented and tested in a first version. However, some of them may not yet offer the full range of functionality. The first field test will also be used to evaluate the planned service and business model. The results will influence the further development of the business plan. After the first field trial, the second iteration of development will start with a review workshop. In this workshop, user feedback will be discussed and if needed, adjustments will be made to the development plan. User requirements and system design will be revised after the review workshop. Based on this, the system will grow further. Within the second field trail the full system functionality will be tested. The user feedback of the second iteration will be considered in a market introduction concept. The system should

run stable after the second iteration so that the care organisations can continue running YouDo after project completion.

Besides of the trials and the pilot, other activities concerning testing and demonstration will be conducted throughout the whole projects lifetime and beyond. They reach from first individual and automated module tests described in the development process and regular integration cycles including friendly user tests in the lab to specifically designed YouDo show cases presented to a broad audience in the iHomeLab during the guided tours visited by over 2500 people every year.

### **Individual workpackage (WP) description**

|   |                           |            |                     |                 |             |            |            |            |            |
|---|---------------------------|------------|---------------------|-----------------|-------------|------------|------------|------------|------------|
| <b>WP number</b>  | <b>1</b>                  |            | <b>WP duration:</b> | <b>M1 – M36</b> |             |            |            |            |            |
| <b>WP title</b>   | <b>Project Management</b> |            |                     |                 |             |            |            |            |            |
| <b>Activity type</b>  | <b>Management</b>         |            |                     |                 |             |            |            |            |            |
| <b>Participant no.</b>  | <b>1</b>                  | <b>2</b>   | <b>3</b>            | <b>4</b>        | <b>5</b>    | <b>6</b>   | <b>7</b>   | <b>8</b>   | <b>TOT</b> |
| <b>Short name</b>   | <b>BMO<br/>B</b>          | <b>AIT</b> | <b>QG</b>           | <b>FHV</b>      | <b>HSLU</b> | <b>PC</b>  | <b>MED</b> | <b>DMM</b> |            |
| <b>Person-months</b>  | <b>11</b>                 | <b>1</b>   | <b>0.5</b>          | <b>1</b>        | <b>1</b>    | <b>0.5</b> | <b>1</b>   | <b>1</b>   | <b>17</b>  |
| <b>Objectives of the WP</b>   |                           |            |                     |                 |             |            |            |            |            |
| The main objective of WP1 is to ensure timely and qualitative achievement of the project results through technical and administrative coordination as well as to provide timely and efficient organisational and financial coordination meeting contractual commitments.  |                           |            |                     |                 |             |            |            |            |            |
| <b>Description of work</b>  |                           |            |                     |                 |             |            |            |            |            |
| <b>T1.1 Coordination and PM (BMOB)</b>  |                           |            |                     |                 |             |            |            |            |            |
| In this task the total management of the project will be done. Based on the plant time scheduling all activities will be coordinated. Each partner gets in regular intervals the information over the actual project state. The coordination and controlling of the financial aspects will be carried out in this task.   |                           |            |                     |                 |             |            |            |            |            |
| <b>T1.2 Communication AAL Association (BMOB)</b>  |                           |            |                     |                 |             |            |            |            |            |
| In this task all the communication to the ALL association will be done. Each partner will be assisted in the account of the performed work and can be supported in the financial founding process.  |                           |            |                     |                 |             |            |            |            |            |
| <b>T1.3 Reporting (BMOB)</b>  |                           |            |                     |                 |             |            |            |            |            |
| All activities and results will be permanently documented and periodically communicated to the different stakeholders.  |                           |            |                     |                 |             |            |            |            |            |
| <b>T1.4 Quality &amp; Risk Management (BMOB)</b>  |                           |            |                     |                 |             |            |            |            |            |
| Involves the creation of a quality management plan and the tracking of the on-going work and reviewing of the deliverables of the other work packages. A detailed risk management plan is established, implemented and continuously updated   |                           |            |                     |                 |             |            |            |            |            |
| <b>T1.5 Meetings &amp; Review (BMOB)</b>  |                           |            |                     |                 |             |            |            |            |            |
| Personal and open communication with all partners is very important. We will start with a kick-off meeting including the starts of the teambuilding process. Later on in a fixed sequence of phone conferences and physical meetings guarantee the information flow. During the tests and trials the personal contact between the developers and the end users must be deep and committed in order to achieve an optimal integration of the feedbacks into the process. |                           |            |                     |                 |             |            |            |            |            |
| <b>Deliverables of the WP:</b>  |                           |            |                     |                 |             |            |            |            |            |
| <b>D1.1: Consortium Agreement</b> (before start) – All important aspects for working in the consortium  |                           |            |                     |                 |             |            |            |            |            |
| <b>D1.2: Project Organisation Description</b> (M1) – All important project execution aspects  |                           |            |                     |                 |             |            |            |            |            |
| <b>D1.3 Quality &amp; Risk Management</b> (M1) – Set-up Quality and Risk Management Tool  |                           |            |                     |                 |             |            |            |            |            |
| <b>D1.4 Periodic status report</b> (every 3 months) - Brief activity reports to inform the all stakeholders   |                           |            |                     |                 |             |            |            |            |            |
| <b>D1.5: Periodic management report</b> (every 6 months) - Detailed project costs/resources view  |                           |            |                     |                 |             |            |            |            |            |
| <b>D1.6 Public final project report</b> (M36) - A final activity report, covering all main aspects  |                           |            |                     |                 |             |            |            |            |            |

|                      |                                 |  |                     |                 |  |  |  |  |  |
|----------------------|---------------------------------|--|---------------------|-----------------|--|--|--|--|--|
| <b>WP number</b>     | <b>2</b>                        |  | <b>WP duration:</b> | <b>M1 – M11</b> |  |  |  |  |  |
| <b>WP title</b>      | <b>Requirements</b>             |  |                     |                 |  |  |  |  |  |
| <b>Activity type</b> | <b>Requirements Engineering</b> |  |                     |                 |  |  |  |  |  |

| Participant no.  | 1     | 2   | 3    | 4   | 5    | 6    | 7   | 8   | TOT  |
|--|-------|-----|------|-----|------|------|-----|-----|------|
| Short name   | BMO B | AIT | QG   | FHV | HSLU | PC   | MED | DMM |      |
| Person-months  | 9.5   | 3   | 4.75 | 3.5 | 4    | 4.75 | 3   | 9   | 41.5 |
| <p><b>Objectives of the WP:</b> Even if the cornerstones and the idea of the project are defined before, detailed ideas of the users, the business partners and research institutions, as well as other stakeholders will be collected, analysed and evaluated in this WP and create sustainable foundation for the whole project.</p> <p>Objective is to understand the needs and wishes of the target groups addressed by the project, hence to reduce the requirements for the planned application. Furthermore, the compliance to ethical issues has to be guaranteed. The user needs will be gathered by extensive user research and the needs of developers and service providers concerning integration and service application development.</p> <p><b>Description of work</b></p> <p><b>T2.1 Ethical Manual (BMOB)</b> – Development of ethical guidelines for the participation of end-users in the requirements analysis and later on in the trials. This will ensure the protection of participants concerning security and privacy, as well as to ensure ethically correct procedures concerning written consent and rules of protection of personal data.</p> <p><b>T2.2 User Stories, Use Cases &amp; Personas (BMOB)</b> – First we develop scenarios (we look into the future) and then we have to find out and cluster of customer needs with the corresponding personas, which are the basis for the use cases generation.</p> <p><b>T2.3 Business Requirements Service (BMOB)</b> – Based on the set of use case, which will be developed in T2.2, business requirements will be derived from it. In an iterative approach, the business requirements will get more stable after every prototyping round.</p> <p><b>T2.4 Technical Requirements (HSLU)</b> – Based on the set of business requirements, the technical requirements will be derived by the expert of the appropriate areas.</p> <p><b>T2.5 Trial Requirements &amp; Scenarios (HSLU)</b> - To achieve exploitable results out of the lab and field trials it is necessary to already define the evaluation methodology (e.g. usability and accessibility inspection), the trial setup (e.g. definition of inclusion-exclusion criteria, operationalization of performance measures) and the user quality factors (e.g. ease to use and confidence measures).</p> <p><b>Deliverables of the WP:</b></p> <p><b>D2.1 Ethical Manual (M5)</b> - A detailed description of all ethical aspects concerning user involvement.</p> <p><b>D2.2 User Stories (M5)</b> – We describe and plastically show which main use cases have to be supported by the YouDo service.</p> |       |     |      |     |      |      |     |     |      |

| WP number  | 3                |      | WP duration: |     | M7 – M30 |    |     |     |      |
|--|------------------|------|--------------|-----|----------|----|-----|-----|------|
| WP title   | Output Platforms |      |              |     |          |    |     |     |      |
| Activity type  | R&D              |      |              |     |          |    |     |     |      |
| Participant no.  | 1                | 2    | 3            | 4   | 5        | 6  | 7   | 8   | TOT  |
| Short name   | BMO B            | AIT  | QG           | FHV | HSLU     | PC | MED | DMM |      |
| Person-months  | 4.5              | 15.5 | 2            | 2   | 16.5     | 2  | 2   | 0   | 44.5 |
| <p><b>Objectives of the WP:</b> The objective of the WP is the development of the YouDo prototype to be used in the pilot &amp; field trials in WP5. The development will be based on the findings of the requirements engineering in WP2. The WP focuses on the development and interconnection of the different output platforms (TV, Internet, mobile devices) and finally on the integration of the education and information modules from WP4. Thus a close</p> |                  |      |              |     |          |    |     |     |      |

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| <p>collaboration with WP4 is deemed necessary in the early analysis and especially specification phase. Insights gained in the trials will be used for improvements in later development cycles.</p>  |
| <p><b>Description of work</b></p> <p><b>T3.1 Analysis (AIT)</b> – Analysis of interfaces and protocols of the following platforms: E-Learning Platform, IPTV Platform, content presentation options on mobile devices, content management systems, evaluation of the connection possibilities for the editing and production systems</p> <p><b>T3.2 Specification (AIT)</b> – Design of architecture for YouDo prototype, making sure, that the architecture is reusable for a potential commercial service. Evaluation of interfaces to Billing, CRM and Customer Self Care for a potential commercial service rollout. Specification of interfaces between platform and training/information modules.</p> <p><b>T3.3 Development (AIT)</b> – Development of specified features from T3.2.</p> <p><b>T3.4 Testing (AIT)</b> – Testing is a product and service validation against the prior defined business and technical requirements. First we write test cases, prioritise them based on the customer impact and execute unit/components tests.</p> <p><b>T3.5 Integration WP3 &amp; WP4 (HSLU)</b> – Integration of the development from WP3 and WP4. Integration of training and information modules into the platform for accessing TV, Internet and mobile devices (YouDo prototype). Analysis of potential improvement potential, optimisation/adaption of the specification.</p> <p><b>T3.6 E2E Testing (HSLU)</b> – Planning and execution of system and E2E-tests. Testing of the integrated system (YouDo prototype) in order to get the technical ready to go for the customer trial.</p> <p>E2E-test will be conducted as quantitative remote usability and immediate impact tests as well as with qualitative instruments (e.g. focuses interviews).</p> |
| <p><b>Deliverables of the WP:</b></p> <p><b>D3.1 Report on analysis and architecture specification (M11, M19)</b></p> <p><b>D3.2 First integrated prototype, ready for end customer trials (M21, M30)</b></p> <p><b>D3.3 Test reports (platforms only) (M18, M28)</b></p>   |

|   |  |             |                     |            |                   |             |            |            |             |
|---|--|-------------|---------------------|------------|-------------------|-------------|------------|------------|-------------|
|   | <b>4</b>                                       |             | <b>WP duration:</b> |            | <b>M 7 – M 26</b> |             |            |            |             |
| <b>WP title</b>   | <b>WP4 Education &amp; Information Modules</b> |             |                     |            |                   |             |            |            |             |
| <b>Activity type</b>  | <b>Content editing &amp; production</b>        |             |                     |            |                   |             |            |            |             |
| <b>Participant no.</b>  | <b>1</b>                                       | <b>2</b>    | <b>3</b>            | <b>4</b>   | <b>5</b>          | <b>6</b>    | <b>7</b>   | <b>8</b>   | <b>TOT</b>  |
| <b>Short name</b>   | <b>BMO B</b>                                   | <b>AIT</b>  | <b>QG</b>           | <b>FHV</b> | <b>HSLU</b>       | <b>PC</b>   | <b>MED</b> | <b>DMM</b> |             |
| <b>Person-months</b>  | <b>1.5</b>                                     | <b>11.5</b> | <b>0.75</b>         | <b>2</b>   | <b>0</b>          | <b>0.75</b> | <b>19</b>  | <b>16</b>  | <b>51.5</b> |
| <p><b>Objectives of the WP:</b> The learning and information units will be defined for different target groups – let's define these as digital natives and digital immigrants. To specify the special needs of the particular target group in first step different needs of user groups will be analysed by scientific research and by discussion with end user and with end user organisations. A main part will cover the technical approach of "digital immigrants" to specify special needs of learning environments for the generation 50+. After the development of first test modules a feedback round from end user and end user organisations and usability checks will lead finally to the development of the learning environment and the educational modules.</p> |  |             |                     |            |                   |             |            |            |             |
| <p><b>Description of work</b></p> <p><b>T4.1 Analysis(DMM, MED)</b> – Analysis of particular target groups by a variety of approaches – Scientific – end user communication – surveys. Next step will be the research of learning theory online learning theories, social learning theories, learning theory generation 50+, technical analyses, and eLearning usability checks.</p>  |  |             |                     |            |                   |             |            |            |             |



|  |
|--|
| <p><b>T4.2 Specification (AIT, MED)</b> –According to the finals of the analyses two main specifications can be defined: technical requirements of learning environment and the learning design of educational materials e.g. videos, tutorials, quizzes, games, etc.</p> <p><b>T4.3 Development (MED)</b> – Online Portal, educational modules, videos, tutorials</p> <p><b>T4.4 Testing (MED)</b> – Testingwith user group and feedback rounds online and offline</p> <p><b>Deliverables of the WP:</b></p> <p><b>D4.1 Specifications fixof the target group "informal carer &amp; person in need of care having dementia" M11</b></p> <p><b>D4.2 Content for target groups designed and produced M18, M26</b></p> |
|--|

|                        |                          |     |                     |           |      |     |     |     |      |
|------------------------|--------------------------|-----|---------------------|-----------|------|-----|-----|-----|------|
| <b>WP number</b>       | 5                        |     | <b>WP duration:</b> | M18 – M35 |      |     |     |     |      |
| <b>WP title</b>        | WP5 Pilot & Field Trials |     |                     |           |      |     |     |     |      |
| <b>Activity type</b>   | Trials                   |     |                     |           |      |     |     |     |      |
| <b>Participant no.</b> | 1                        | 2   | 3                   | 4         | 5    | 6   | 7   | 8   | TOT  |
| <b>Short name</b>      | BMO<br>B                 | AIT | QG                  | FHV       | HSLU | PC  | MED | DMM |      |
| <b>Person-months</b>   | 6                        | 0   | 4.5                 | 5         | 8.5  | 4.5 | 0   | 17  | 45.5 |

**Objectives of the WP:** The main objectives of this work package are to:

- 1) Develop technical trial environment and conduct technical and functional tests in final prototypes
- 2) Detailed design of the end-user practical tests
- 3) Real-live test real end-user in real end-user environments
- 4) Proof of Concept of prototype and evaluate feedback

An iterative approach is facilitated in which two testing and demonstration trials are planned in which incremental prototypes are tested, evaluated and finally further improved. The first trial – in a smaller set up using consortium internal stakeholders - will take place halfway down the project. The second trial is organised at the end of the project involving more end users and accessing our end user organisation to recruit external resources.

**Description of work**

**T5.1 Technical trial development and functional prototype tests** – This task is concerned with developing and setting up the technical environment in a real-life setup in which the trials can take place. This also involves integrating, testing and preparing the prototypes coming from the R&D teams to finally deliver them to the end users.

**T5.2 End user trial design & community** – Deals with the test design and the practical, non-technical issues concerning the trials. A test plan needs to be created (e.g. one-group pre-test-post-test design), guide for the end users written and of course the end users recruited and selected.

**T5.3 Trial execution, test of prototype & proof of concepts** – After the end users have been trained, here the tests with the end users in a real-life situation are actually executed (using a set of monitoring techniques) and the concepts as well as the stability of the architecture proven. The users have to be accompanied and the tests coordinated in order to ensure consistency in research approaches across national borders.

**T5.4 End user and system feedback evaluation** – After the execution, the test data produced has to be studied, user surveys conducted and the feedback analysed in order to thoroughly evaluate the tests and come to a conclusion about how the success parameters have been met.

**T5.5 Optimizations** – Allows taking the results of the first trial and proposing optimizations and improvements for the further research until the end of the project time frame.

**Deliverables of the WP:**

**D5.1 Trial Design & Planning Report** including **Guide** for end-user testing trials(M11)

**D5.2 Trial Environment** including incremental prototype to put onto trials(M21, M31)  
**D5.3 Report on end-user tests** including observations, test results and demonstrations(M25, M35)

|  |   |            |                     |            |                 |            |            |            |            |
|--|---|------------|---------------------|------------|-----------------|------------|------------|------------|------------|
| <b>WP number</b>   | <b>6</b>  |            | <b>WP duration:</b> |            | <b>M1 – M36</b> |            |            |            |            |
| <b>WP title</b>  | <b>WP6 Dissemination &amp; Exploitation</b>           |            |                     |            |                 |            |            |            |            |
| <b>Activity type</b>   | <b>Marketing, Dissemination and Business Planning</b> |            |                     |            |                 |            |            |            |            |
| <b>Participant no.</b>   | <b>1</b>  | <b>2</b>   | <b>3</b>            | <b>4</b>   | <b>5</b>        | <b>6</b>   | <b>7</b>   | <b>8</b>   | <b>TOT</b> |
| <b>Short name</b>  | <b>BMO B</b>  | <b>AIT</b> | <b>QG</b>           | <b>FHV</b> | <b>HSLU</b>     | <b>PC</b>  | <b>MED</b> | <b>DMM</b> |            |
| <b>Person-months</b>   | <b>5</b>  | <b>4</b>   | <b>5.5</b>          | <b>3</b>   | <b>2</b>        | <b>5.5</b> | <b>0</b>   | <b>5</b>   | <b>30</b>  |
| <b>Objectives of the WP:</b>   |   |            |                     |            |                 |            |            |            |            |
| <p>Protection of IPR of new and unique technology discovered and developed within the project.<br/>                 Dissemination means wide distribution of the project result (marketing and scientific publications).<br/>                 Business plan, which is based on realistic assumptions and focuses on a successful exploitation of a commercial service on the EU market.</p>  |   |            |                     |            |                 |            |            |            |            |
| <b>Description of work</b>   |   |            |                     |            |                 |            |            |            |            |
| <p><b>T6.1 IPR &amp; Patents (QG)</b> – All technology developed within the project, including program code, services and products, will be examined by 3<sup>rd</sup> partner IPR-specialists in order to detect any technique that would qualify as being new, and that shows patent height (patent), in order for it to be protected through patent design and/or trademark applications.</p> <p><b>T6.2 Dissemination, public awareness (PC)</b> – The result of the project will be promoted through scientific journals, newspaper articles, user-stories, live events, the web page and press releases. The aim is to create a maximum marketing effect and to establish a demand. A precondition is, that the IPRs and patents are secured before.</p> <p><b>T6.3 Market analysis, Business plan (BMOB)</b> – All relevant stakeholder has to be identified, in close collaboration with all stakeholders, a stable business model has to be developed, market data has to be gathered, end customer involvement is a key topic. The outcome is a stable business case, which has a clear focus on the exploitation of the service in the EU market.</p> |   |            |                     |            |                 |            |            |            |            |
| <b>Deliverables of the WP:</b>   |   |            |                     |            |                 |            |            |            |            |
| <p><b>D6.1 Dissemination &amp; Exploitation Plan (M4)</b>– All activities for dissemination and exploitation are defined and explained</p> <p><b>D6.2 Marketing Concept (M36)</b>– Marketing concept describing marketing activities on all levels</p> <p><b>D6.3 Business Plan Final (M36)</b>– A draft of carefully executed and market-oriented business plan</p>   |   |            |                     |            |                 |            |            |            |            |

### Work package (WP) overview list

| WP no. | WP title                      | Type of activity | Lead no. | Lead  | Person months | Start Month | End Month |
|--------|-------------------------------|------------------|----------|-------|---------------|-------------|-----------|
| 1      | Project Management            | Mntg.            | 1        | BMO B | 18            | 1           | 36        |
| 2      | Requirements                  | Req.- Eng.       | 1        | BMO B | 42.5          | 1           | 11        |
| 3      | Output Platforms              | R&D              | 2        | AIT   | 44.5          | 7           | 31        |
| 4      | Education&Information Modules | Cont.&Edit       | 7        | MED   | 51            | 7           | 25        |
| 5      | Pilot & Field Trials          | Trial            | 5        | HSLU  | 46.5          | 18          | 35        |
| 6      | Dissemination & Exploitation  | Diss.&Exp l.     | 3        | QG    | 30            | 1           | 36        |
|        | <b>TOTAL</b>                  |                  |          |       | <b>232.5</b>  |             |           |



**Deliverables overview list**

| <b>Del. no.</b> | <b>Deliverable name</b>          | <b>from WP no.</b> | <b>Nature/type of deliverable</b> | <b>Dissemination level</b> | <b>Delivery date (project month)</b> |
|-----------------|----------------------------------|--------------------|-----------------------------------|----------------------------|--------------------------------------|
| D1.1            | Consortium Agreement             | 1                  | Document                          | Public                     | Before Start                         |
| D1.2            | Project Organisation Description | 1                  | Document                          | Public                     | 1                                    |
| D1.3            | Quality & Risk Management        | 1                  | Document                          | Restricted                 | 1                                    |
| D1.4            | Periodic status report           | 1                  | Report                            | Public                     | every 3                              |
| D1.5            | Periodic management report       | 1                  | Report                            | Restricted                 | every 6                              |
| D1.6            | Public final project report      | 1                  | Report                            | Public                     | 36                                   |
| D2.1            | Ethical Manual                   | 2                  | Document                          | Restricted                 | 5                                    |
| D2.2            | User Stories                     | 2                  | Document                          | Restricted                 | 5                                    |
| D3.1            | Analysis & architecture spec     | 3                  | Document                          | Restricted                 | 11, 19                               |
| D3.2            | First Prototype                  | 3                  | System                            | Restricted                 | 21, 30                               |
| D3.3            | Test Reports                     | 3                  | Report                            | Restricted                 | 18, 28                               |
| D4.1            | Target group specification fix   | 4                  | Document                          | Restricted                 | 11                                   |
| D4.2            | Content designed & produced      | 4                  | Document                          | Restricted                 | 18, 26                               |
| D5.1            | Trial Design & Planning Report   | 5                  | Report                            | Restricted                 | 11                                   |
| D5.2            | Trial environment                | 5                  | System                            | Restricted                 | 21, 31                               |
| D5.3            | Report on end-user tests         | 5                  | Report                            | Restricted                 | 25, 35                               |
| D6.1            | Dissem. & Exploitation Plan      | 6                  | Report                            | Public                     | 4                                    |
| D6.2            | Marketing concept                | 6                  | Document                          | Restricted                 | 36                                   |
| D6.3            | Business Plan final              | 6                  | Document                          | Restricted                 | 36                                   |

**Milestones overview list**

| <b>No.</b> | <b>Milestone name</b>   | <b>WP involved</b> | <b>Expected date</b> | <b>Means of verification</b> |
|------------|---|--------------------|----------------------|------------------------------|
| M1         | Project initiation phase completed  | 1                  | 4                    | T1.1, T1.4, T1.5, T6.2       |
| M2         | YouDo business requirements fix   | 2                  | 6                    | T2.3                         |
| M3         | YouDo technical requirements fix  | 2                  | 9                    | T2.4                         |
| M4         | YouDo architecture frozen   | 3                  | 11                   | T3.2                         |
| M5         | First Business Plan   | 6                  | 20                   | T6.3, T2.3, T2.4, T3.2       |
| M6         | Service development 1 <sup>st</sup> iteration ready   | 3, 4               | 21                   | T3.3, T3.5, T3.6, T4.3       |
| M7         | Service development 2 <sup>nd</sup> iteration ready   | 3, 4               | 31                   | T3.3, T3.5, T3.6, T4.3       |
| M8         | Internal trial successfully completed   | 5                  | 25                   | T5.3, T5.4, T5.5             |
| M9         | External trial successfully completed   | 5                  | 35                   | T5.3, T5.4, T5.5             |
| M10        | Project successfully finished, final Business case, Final Trial Results, Dissemination of the results | All                | 36                   | T6.1, T6.2, T6.3             |

**Summary overview of staff effort in person months (pm)**

| Partic. no.  | Participant short name | WP1       | WP2         | WP3         | WP4         | WP5         | WP6       | Total pm   |
|--------------|------------------------|-----------|-------------|-------------|-------------|-------------|-----------|------------|
| 1            | BMOB                   | 11        | 9.5         | 4.5         | 1.5         | 6           | 5         | 37.5       |
| 2            | AIT                    | 1         | 3           | 15.5        | 11.5        | 0           | 4         | 35         |
| 3            | QG                     | 0.5       | 4.75        | 2           | 0.75        | 4.5         | 5.5       | 18         |
| 4            | FHV                    | 1         | 3.5         | 2           | 2           | 5           | 3         | 16.5       |
| 5            | HSLU                   | 1         | 4           | 16.5        | 0           | 8.5         | 2         | 32         |
| 6            | PC                     | 0.5       | 4.75        | 2           | 0.75        | 4.5         | 5.5       | 18         |
| 7            | MED                    | 1         | 3           | 2           | 19          | 9           | 1         | 35         |
| 8            | DMM                    | 1         | 9           | 0           | 16          | 17          | 5         | 48         |
| <b>Total</b> |                        | <b>17</b> | <b>41.5</b> | <b>44.5</b> | <b>51.5</b> | <b>54.5</b> | <b>31</b> | <b>240</b> |

|  |      | 1 | 2 | 3 | 4  | 5 | 6  | 7 | 8  | 9 | 10 | 11 | 12 | 13 | 14 | 15 | 16 | 17 | 18 | 19 | 20 | 21 | 22 | 23 | 24 | 25 | 26 | 27 | 28 | 29 | 30 | 31 | 32 | 33 | 34 | 35 | 36 |     |  |
|--|------|---|---|---|----|---|----|---|----|---|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|-----|--|
| <b>WP1 Project Management</b>                  | BMOB |   |   |   |    |   |    |   |    |   |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |     |  |
| T1.1 Coordination and PM                       | BMOB |   |   |   | M1 |   |    |   |    |   |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |     |  |
| T1.2 Communication AAL Association             | BMOB |   |   |   |    |   |    |   |    |   |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |     |  |
| T1.3 Reporting                                 | BMOB |   |   |   |    |   |    |   |    |   |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    | M10 |  |
| T1.4 Quality & Risk management                 | BMOB |   |   |   |    |   |    |   |    |   |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |     |  |
| T1.5 Meetings & Reviews                        | BMOB |   |   |   |    |   |    |   |    |   |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |     |  |
| <b>WP2 Requirements</b>                        | BMOB |   |   |   |    |   |    |   |    |   |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |     |  |
| T2.1 Ethical Manual                            | BMOB |   |   |   |    |   |    |   |    |   |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |     |  |
| T2.2 User Stories, Use Cases & Persona         | BMOB |   |   |   |    |   |    |   |    |   |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |     |  |
| T2.3 Business Requirements Service             | BMOB |   |   |   |    |   | M2 |   |    |   |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |     |  |
| T2.4 Technical Requirements                    | IHL  |   |   |   |    |   |    |   | M3 |   |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |     |  |
| T2.5 Trial Requirements & Scenarios            | IHL  |   |   |   |    |   |    |   |    |   |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |     |  |
| <b>WP3 Output Platforms</b>                    | AIT  |   |   |   |    |   |    |   |    |   |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |     |  |
| T3.1 Analysis                                  | AIT  |   |   |   |    |   |    |   |    |   |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |     |  |
| T3.2 Specification                             | AIT  |   |   |   |    |   |    |   |    |   |    | M4 |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |     |  |
| T3.3 Development                               | AIT  |   |   |   |    |   |    |   |    |   |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |     |  |
| T3.4 Testing                                   | AIT  |   |   |   |    |   |    |   |    |   |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |     |  |
| T3.5 Integration WP3 & WP4                     | IHL  |   |   |   |    |   |    |   |    |   |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |     |  |
| T3.6 E2E Testing                               | IHL  |   |   |   |    |   |    |   |    |   |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |     |  |
| <b>WP4 Education &amp; Information Modules</b> | MED  |   |   |   |    |   |    |   |    |   |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |     |  |
| T4.1 Analysis                                  | DMM  |   |   |   |    |   |    |   |    |   |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |     |  |
| T4.2 Specification                             | MED  |   |   |   |    |   |    |   |    |   |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |     |  |
| T4.3 Development                               | MED  |   |   |   |    |   |    |   |    |   |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |     |  |
| T4.4 Testing                                   | MED  |   |   |   |    |   |    |   |    |   |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |     |  |
| <b>WP5 Pilot &amp; Field Trials</b>            | IHL  |   |   |   |    |   |    |   |    |   |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |     |  |
| T5.1 Trial development                         | IHL  |   |   |   |    |   |    |   |    |   |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |     |  |
| T5.2 Trial environment & community             | IHL  |   |   |   |    |   |    |   |    |   |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |     |  |
| T5.3 Trial execution                           | IHL  |   |   |   |    |   |    |   |    |   |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |     |  |
| T5.4 Trial evaluation & feedback               | IHL  |   |   |   |    |   |    |   |    |   |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |     |  |
| T5.5 Optimizations                             | IHL  |   |   |   |    |   |    |   |    |   |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |     |  |
| <b>WP6 Dissemination &amp; Exploitation</b>    | QG   |   |   |   |    |   |    |   |    |   |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |     |  |
| T6.1 IPR Protection                            | QG   |   |   |   |    |   |    |   |    |   |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |     |  |
| T6.2 Dissemination, public awareness           | QG   |   |   |   |    |   |    |   |    |   |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |     |  |
| T6.3 Market analysis / business plan           | BMOB |   |   |   |    |   |    |   |    |   |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |    |     |  |

Figure 6: YouDo Project Plan - Gant Chart

### Section 3: Quality of the consortium and efficiency of the implementation

In this section we want to describe the implementation of the project plan given in section 2. We want to show the various competencies of the proposal consortium partners and the infrastructure required for the successful completion of the defined tasks.

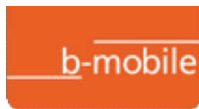
#### 3.1 Quality of the Consortium

**b-mobile GmbH**

YouDo CA

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b-mobile GmbH was founded in Cham, Switzerland, in March 2001. Currently it has 10 highly qualified and motivated employees. Its core competence is in developing products and services for telecommunication and IT companies. The service portfolio focuses

on the one hand on holistic management of innovative product projects from the perspectives of marketing and the technology, and on the other hand in staffing of integrated expert teams for the design and implementation phases of product & service projects.

It is working in following segments: Telecom operator and supplier, e-Governance & e-Health, Digital Media, Defence & Public safety and Public Transportation & Logistics. Most of its customers are private and public telecommunication operators and suppliers, mainly in Europe.

By using a customer-oriented service developing process, b-mobile is able to build a marketable product/service. Following projects in the e-health area were successfully implemented:

- Electronic Health Dossier (Evita, from 2007 till 2010) - Conceptual design and building up of an electronically patient record card
- Swiss Health Professional Card (Swisscom from 2008 till 2010) - Conceptual design and build up of the system
- Mandate for the developing an European service in the smart home area for Swisscom (since 2010)

**Christin Weigel** completed her economic-scientific studies with main focus Health Management & Marketing. She has participated in a Europe-wide eHealth market study, development of a fall detection service and a smart home project of a big telecom provider. She has special knowledge in the area eHealth/AAL, project management, process analysis and optimization, marketing and product development.

**Thomas Bugal** successfully completed his studies in information technology at Chemnitz Technical University in Germany in 1993. In 2006, he successfully completed a further degree in Management at the University of St. Gallen Switzerland. He has more than 18 years of experience in telecom, media and IT, where he has specialised on the development of customer oriented, innovative products and services mainly for operators.

#### **AIT Austrian Institute of Technology GmbH (AIT)**



AIT is Austria's largest extra-university research institute in applied research and development. The multidisciplinary team from the Health & Environment department has the needed know-how in the field of AAL and especially in sensor integration and abstraction, activity sensing, system integration and standardization activities. AIT has experience from different national, AA-JP and European research projects (e.g. Bedmond, Companionable, AALuis, MPOWER, universAAL, NovaHome - Homer) in the field of AAL. AIT is currently coordinating the AAL JP project AALuis.

**Christopher Mayeris** PhD in applied mathematics and has joined the biomedical engineering group of AIT during his studies. He has graduated in 2004 and received the doctor's degree in 2007 at the Vienna University of Technology. He is involved in various national and international projects on AAL. His focus is on the evaluation of services with older adults in universAAL and as project coordinator on user interaction and user interfaces in AALuis.

**Martin Morandell** has graduated from computer science with focus on Assistive Technology (AT) and graduated as an academic expert of AT. His focus is on AAL, HCI for the elderly and people with cognitive impairments, AT for visually impaired end users as well as on how to apply AT in a successful and lasting way. Joining the AIT in 2008 he works as a project manager and takes part in international projects on AAL. He also offers trainings on AT for people with disabilities and gives lectures.

#### Quantos Group AG (QG)



Uwe and Walter both co-founded Acetrax, the pan-European cloud-based Video-on-Demand service that pioneered many features like over-the-top (OTT) delivery of HD movie streams, presence on Smart TVs, multi-screen use and international Hollywood rights, and successfully sold the company to British Sky Broadcasting in April 2012. After the subsequent handover period, both entrepreneurs decided to start another business venture in the same fast-growing, trendsetting sector. With their joint experience and financial means, they have set eyes on the attractive and largely untapped market of infotainment and entertainment services to the 60+ age group, including such unparalleled features like elderly home care support and home shopping. Quantos Group AG was formed as the vessel to pursue these objectives and bring them to market.

**Walter Jucker**, born in 1958, studied at the University of Applied Sciences in Economic and Business Zurich, Switzerland. He's career spans many years in senior positions within the international banking community. In the early 1990s Walter changed direction and moved to the telecom industry to become the European MD of a large US telecom provider, Xpedite Intl. In 1997 he built up his own company Unimontis and successfully sold it in 2004 to a NYSE-listed company. In 2006 he was co-initiator, CFO & COO of Acetrax AG (VOD Provider) which was successfully sold to BSkyB in 2012. Walter has also experience as board member of mainly small Swiss companies.

**Uwe Placzek**, born 1969, is an entrepreneurial Senior Management Professional with international experience in building and growing businesses around innovative products, as well as in spotting future trends. He gathered extensive expertise in global digital media distribution and established a proven track record in discovering new business concepts and opportunities as well as in the delivery of pioneering, world class products. Throughout his career, Uwe held various senior and executive management positions including with Sunrise, Siemens, Acetrax and Sky. Uwe holds a Master degree in Design and Development in Mechanical Engineering from Technical University Chemnitz, Germany.

#### Procult Consulting GmbH (PC)



Proculat has its roots in the change management and process/business reengineering practices. As an evolution of the application of business and process excellence to product design, development and implementation as well as operations, Proculat is now focussing on product strategy, procedural and operational frameworks as well as go to market concepts for home automation, ambient assisted living, assisted home care and energy management. In those areas, Proculat currently provides executive level strategy consultancy to major international players in the telecom market. With Markus and Annette at the helm, Proculat features two

highly experienced thought leaders in the smart home strategy and operations space in Europe.

**Annette Ohlich**, born in 1969, studied in Munich (Germany) and California (USA) and has since held various project management and executive positions in the operations and IT space in major global companies. With a broad experience base in customer focused process and service design, as well as an in depth understanding of facilitating and driving change, Annette has repeatedly contributed significantly to multi-million Euro projects and business endeavors.

**Markus Doetsch**, born in 1966, studied at the University of Kaiserslautern (Germany) and Michigan State University (USA) and got the master diploma in electrical engineering. He has 17 years of professional experience in management positions for product marketing and IT. As a business unit leader, Markus has driven Swisscom Smart Secure Living from 2010 onwards to successful market entry in November 2012.

### **Diakonie München-Moosach (DMM)**



**Diakonie  
München-Moosach**

The **Diakonie München-Moosach** is a carrier, which has been providing social services to the northwest of Munich since 1965. The main focus lies in the work with seniors. The biggest department is the outpatient care. Besides this, the DMM oversees the Senior-Clubs of the church community, offers gymnastics and dance courses as well as a cultural and a travel program for seniors.

Through the diversity of the activities DMM has access to different groups of seniors and experience dealing with different target groups. DMM has the strength of motivating different groups of seniors for a variety of activities as well as assisting and cultivating them in the process. In order to offer our high quality services we work with a broad network. The DMM is currently collaborating in an AAL project (Join-In, 2nd Call).

**Christoph Duschl** is the CEO of DMM. Part of his expertise lie in Quality Management, Advanced Training, Educational Work with seniors and Consulting in the field of age, health and poverty. He is among other things responsible for the Management of outpatient care and the neighbourly help. He was a coordinator for the ESF and was responsible for Innovation Management and Product Management. He is in charge of project management of AAL-Projects.

**Stefanie Wengel** is a sociologist, which has worked in Education Management and is now in charge of social research and user involvement at DMM. She has a good access to the user groups, since she is involved in the different areas of our work with seniors (e.g. educational work, cultural excursions and outpatient care). She is responsible for the gathering of user requirements and the piloting in the AAL-JP "Join-In".

### **Lucerne University of Applied Sciences and Arts – Engineering & Architecture, CEESAR-iHomeLab (HSLU)**



CEESAR-iHomeLab ([www.iHomeLab.ch](http://www.iHomeLab.ch)) of the Hochschule Luzern (HSLU) is the leading research centre for building intelligence in Switzerland. Together with the support of its over 70 industrial partners, the iHomeLab team conducts funded applied research in the areas AAL, human building interaction

(HBI) and energy efficiency (EE). Since 1997 the iHomeLab team gained broad experience in conducting around 35 applied and cutting edge research projects, funded by national and international authorities and in close cooperation with our industrial partners (Swisscom, Siemens, Landis+Gyr, ABB, Phonak, Schindler) and end user organisations. We actively take part in shaping new standards and technologies being a member of standards organisations (e.g. ZigBee Alliance, KNX Scientific) as well as focusing on user driven solutions being part of the European Network of Living Labs (ENoLL). Further, the team has hands-on experience in the analysis, adoption, integration, deployment and test of hardware & software infrastructures (e.g. indoor localisation system iLoc) and the implementation and test of user centric services & trial organisation.

**Alexander Klapproth** is a professor in the Faculties of Electrical Engineering and Information Technologies and head of the iHomeLab. He is head and initiator of the iHomeLab – The Swiss Think Tank and Research Laboratory for Intelligent Living ([www.iHomeLab.ch](http://www.iHomeLab.ch)).

**Rolf Kistler** is a research group leader and senior researcher where he also received his degree in Electrical Engineering (Industrial Informatics). After graduation, he spent 6 years as an embedded software engineer and technical project leader. Currently, he is performing research and coaching projects in the field of networked systems with focus on AAL at iHomeLab.

**Dr. Martin Biallasis** is a senior researcher at the Lucerne University of Applied Sciences. He holds a Dr. sc. ETH and is performing research in the field of building intelligence and smart homes with focus on AAL at the iHomeLab ([www.iHomeLab.ch](http://www.iHomeLab.ch)).

### Vorarlberg University of applied science



Vorarlberg University of applied science (FHV) is a non-profit corporation in the most Western province of Austria. With several research labs and degree programs it is Vorarlberg's foremost research and academic education organisation. FHV has extensive experience with national (FFG, FWF) and European R&D projects (e.g. FP6, FP7, AAL JP, Interreg, Leonardo). User Centered Technologies Research, the department which is involved in this Project, employs a small interdisciplinary task force (computer scientists, psychologists, designers, ergonomist etc) to pioneer the development of new innovative ICT products such as social web platforms, mobile touch devices, and smart infotainment systems. For this purpose UCT Research develops as well as validates many usability inspection and testing methods and put them into practice to support the user centered design process, organises each year a conference called "Usability Day" in an international context, and has built up an international "Usability Network" with usability professionals in German speaking countries.

**Guido Kempter** is founder and head of UCT Research, Professor in Human-Computer Interaction at FHV, private lecturer at University Duisburg-Essen at Institute of Computer and Cognitive Sciences, and associated researcher at University of Health Sciences, Medical Informatics, and Technology in Hall.

**Walter Ritter** is Research Assistant at UCT Research, computer scientist and lecturer in Software Engineering, and has published several scientific papers on human-computer interaction topics

### Meditraining



Meditraining was founded in 2000 as a service provider and supplier of educational training in radiology. By introducing new training concepts in medicine in terms of educational training delivered didactically and methodically designed for small groups with interactive elements, Meditraining became the market leader for educational training in radiology in the German-



speaking market. Since the foundation Meditrainment also increasingly conducted educational training units at radiological sites, the so-called „In-House Training“. These units are a mixture of on-site user training and consultancy in infrastructural and technical questions to specifically address and meet the customers' wishes and needs. The Meditrainment Consulting GmbH, won a national call to develop a learning platform for strategic human resources development in medicine and healthcare in 2005. As a result the learning platform "EWISTA plus" was developed which combines the principles of web 2.0, micro learning and mobile learning. Today Mediatrainment offers a wide range of multimedia and face-to-face training to support change management in quality management.

**Alexander v. Smekal Dr. med**, graduated from University of Cologne in 1985. He is appointed as Assistant Professor in University Hospital Innsbruck, University Hospital Zürich and University Hospital Leiden. Dr. Smekal boards in various medicine topics. He is Managing director of "Diagnostisches Zentrum" Garmisch- Partenkirchen/Germany, Cofounder of Meditrainment GmbH/Germany & Meditrainment Consulting GmbH/Austria. Additional to that, he is a Trainer and consultant for human resource development in medicine and healthcare.

**Patricia Köll** has graduated at Innsbruck University 2005 and was employed as a research assistant for several years at the University of Innsbruck and the Research Studios Austria in the field of Educational Technology and Microlearning. She works since 2007 as an independent IT Consultant with focus eLearning and Social Media in adult education for the Austrian Chamber of Commerce. Since 2011 Patricia Köll is employed at Meditrainment GmbH and responsible for ICT-Management.

### 3.2 Project management

In order to run a successful project, you have to focus on a well-structured project organisation, roles and responsibilities has to be clear and you should have appropriate skills experience in running of big projects. Our project is structured in 3 Layers:

**1.Management layer:**Steering Committee, Project Coordinator and the Advisory Board are responsible for all mayor decisions and the project management tasks.

**2.Working group layer:** This layer takes care about the 4 most important content domains such as science & technology, end user involvement& Content, ethics & privacy and dissemination and business aspects.

**3.Work package layer:**The work package leaders are responsible for the management & coordination, the quality of the work and for meeting the goals within the assigned work packages.

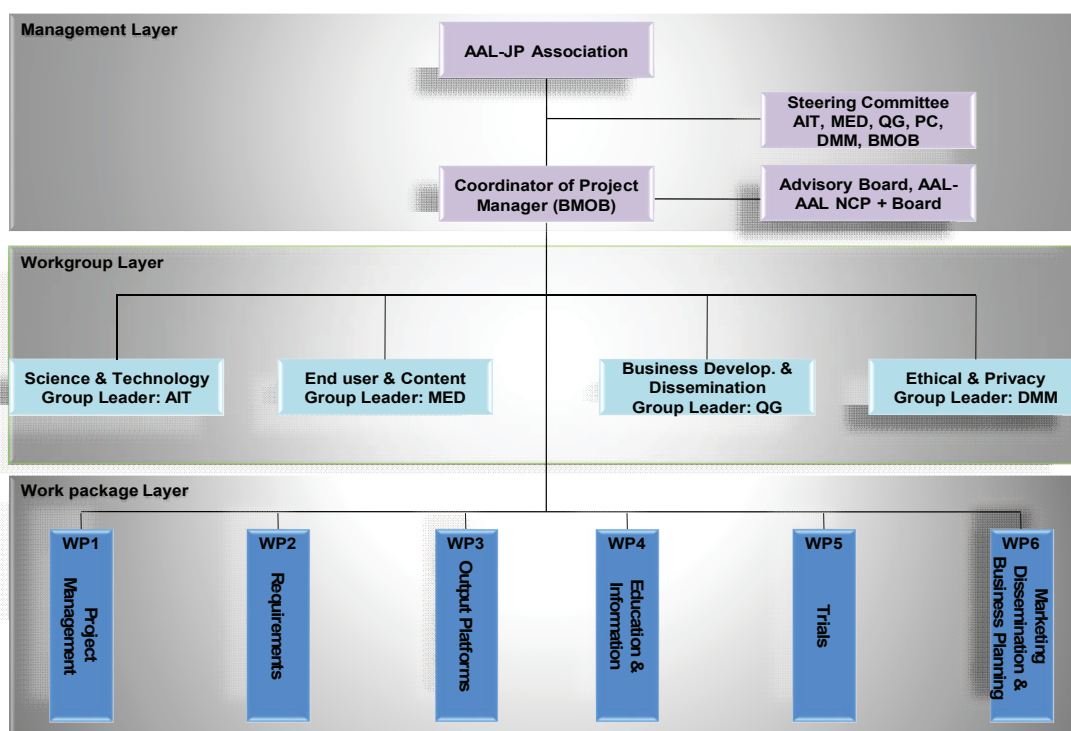


Figure 7: Organisational project management structure

**Steering Committee-** The committee is the executive institution of the consortium and has the overall management responsibility of the project. Five representatives of the consortium consisting of the 4 work group leaders and the coordinator b-mobile form it. They have the responsibility for decisions on financial and strategic issues. The coordinator as organizer and chair of the committee will prepare and preside meetings ordinarily a minimum of three times per year. If the need arises, meetings will take place outside of those scheduled, at the request of any partner. The decisions of the steering committee will be voted by majority of the members each having one vote. The steering committee is responsible for: (1) decision making (2) Reviewing, Evaluating, Assessing, Tracking (3) Coordinator support (4) Conflict resolution.

**Project Coordinator-** The project coordinator has the responsibility of the overall project management and coordination tasks under the supervision of the steering committee. The coordinator is the central contact point and information hub for all project stakeholders: the European Commission, the steering committee, the workgroup leaders and the work package leaders. He fosters a culture of quality and efficiency, in terms of time and resources promoting transparency and accountability amongst the partners regarding all aspects of the program. He actively cultivates the teambuilding process and also mediates in conflict situations. The tasks of the project coordinator include: (1) planning, scheduling (2) Coordinating, communicating (3) monitoring, tracking (4) assisting, guiding.

**Advisory Board-** On a regular basis, the project coordinator involves an Advisory Board, consisting of representatives of the AAL National Contact Points and, conceivably, the AAL Board. Together they will discuss the progress, look at the processes, check the financial situation and identify improvements or handle potential project execution issues. The Advisory Board activities enforce the cooperation with related initiatives such as international,



national or EU and AAL funded projects. Project reports and occasionally organised meetings will allow taking advantage of synergetic effects between initiatives with complementary activities and helps avoiding duplication of efforts.

**Workgroup: Science & Technology** - The science & technology workgroup consists of 3 members, the two scientific partners (HSLU, AIT) and the technology provider PrivyTV(subcontractor BMOB). The aim of this group is to assure the scientific and technological objectives of the project are met and is involved in all major decisions concerning science and technology. Among other activities, they are responsible for the technical and non-functional requirements, the progress beyond the state of the art and the scientific quality as well as the technical reliability of the project deliverables. The group is also heavily involved in designing and setting up the overall system architecture of the YouDo service. The Science & Technology Board is lead by a representative of AIT manages of all board activities.

**Workgroup: End user & Content-** The group members consist of representatives of the end user organizations in Germany (DMM), FHV as a specialist in user centred technology research, MED which is specialist in eLearning and content aggregation and a scientific partner (HSLU) which is the leader of the end user trial work package. The workgroup will meet on a bi-monthly basis and is in charge of all end user related activities of the project. They are in charge of bringing the end users into the requirements process, ensure the code of ethics, and are involved in the preparation, procedures and organization of the end user trials, the selection and interviews of trial participants and the continuous evaluation of the end user perception and valuation. Additional to that, in this workgroup is taking care about the content collection, content aggregation, editing & production. The workgroup is lead by MED who is responsible for the management and coordination of all activities of the work group.

**Workgroup: Business Development&Dissemination** –This group takes care about the business planning including, business modelling, market analysis, cost analysis, the marketing plan, financial planning and possible funding sources. Additional it coordinates and executes the dissemination of the project results and is in charge of all project-marketing activities. The workgroup consists of leaders of the science & technology and the end user & content workgroup, and the SME, QG, PC and BMOB. The group will meet throughout the project on a bi-monthly scheduled meeting. The group is lead by a representative of QG.

**Workgroup: Ethical & Privacy** - The ethics and privacy manager of DMM will take care about all related aspects in the project and is represented in the steering committee reporting any special findings and advising it. He will be active throughout the whole project assuring the fully informed consent and free will of the volunteer participants, special precautions for particularly vulnerable persons with cognitive or physical impairments, specific care-taking measures for each individual taking part in the project and the general compliance with the ethical and data privacy guidelines.

**Work Package Leaders:** - Every work package (WP) is assigned a WP leader. He has the responsibility to ensure the objectives of his WP and that all planned tasks in his work package are completed on time and the outputs are delivered with the expected quality. The leader reports the WP progress, sends the deliverables and follows the milestones closely working together with project coordinator. In general WP leaders are in charge of taking decisions concerning their work package. However, the WP leader closely cooperates and communicates with the other project stakeholders such as group leaders. The leader cares for the dissemination & exploitation of his WP.

### 3.3 Available resources

We distinguish between human resources and specific infrastructure and software, which will be used in order to deliver the project successfully.

**Human resources:**

The partner DMM adds a profound knowledge and experience in the area of professional care and have the direct access to the end customer – to the elder adults in need of care and to the informal carers. The partner MED combines the medical/care knowledge with the eLearning and content aggregation topics. On the development side of the YouDo multimedia portal, we have the research institute AIT and HSLU which brings the technological knowhow for the development of the YouDo platform itself and the integration of all the supporting system. FHV will support the design process of the portal with their user centric design knowledge and experience. In order to design customer centric services from a marketing point of view, which could be reused for commercial deployment, BMOB will bring in their expertise in this area together with QG and PC, which are guarantors for designing realistic business cases and the know how to market telecom and media services.

BMOB, AIT and MED has planned a small budget for subcontracting. BMOB wants to subcontract the company PrivyTV, which provides the technology to setup and distribute your own IP-TV channel. The California-based very innovative company PrivyTV is a key element for our success, but can't participate as a non-EU company officially in this AAL-Call. Furthermore AIT has planned to work with the company Innova used for activities regarding easy-to-read and easy-to-understand topics. Easy-to-understand is an important issue when talking about education for carers since on the one side migration background of and on the other side understanding of technological driven explanations by informal carers should not be neglected. MED will collaborate with a company specialised in supporting professional video content production.

The total project costs over 36 month is estimated as 3.077 Mio EURO with a requested funding of 1.711 Mio EURO. The breakdown of the total project cost you will in the table underneath:

| PARTNER                         | BMOB      | AIT       | QG        | PC        | FHV       | IHL       | MED       | DMM       | TOTAL       |
|---------------------------------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-------------|
| TOTAL [MM]                      | 37,5      | 35        | 18        | 18        | 16,5      | 32        | 35        | 35        | 243         |
| TOTAL Saleries & Overheads      | 558.150 € | 378.133 € | 239.400 € | 239.400 € | 144.540 € | 425.600 € | 367.500 € | 469.674 € | 2.822.397 € |
| Saleris only                    | 558.150 € | 378.133 € | 239.400 € | 239.400 € | 120.450 € | 425.600 € | 367.500 € | 469.674 € | 2.798.307 € |
| Overhead                        | 0 €       | 0 €       | 0 €       | 0 €       | 24.090 €  | 0 €       | 0 €       | 0 €       | 24.090 €    |
| Consumables                     | 10.000 €  | 10.000 €  | 1.500 €   | 1.500 €   | 3.000 €   | 5.000 €   | 10.000 €  | 1.380 €   | 42.380 €    |
| Expenses Travelling Costs       | 18.000 €  | 18.000 €  | 6.000 €   | 6.000 €   | 12.000 €  | 18.000 €  | 18.000 €  | 27.645 €  | 123.645 €   |
| Infrastructure and depreciation | 3.000 €   | 0 €       | 1.500 €   | 1.500 €   | 3.000 €   | 8.000 €   | 8.000 €   | 3.000 €   | 28.000 €    |
| Subcontracting                  | 25.000 €  | 10.000 €  | 0 €       | 0 €       | 5.000 €   | 0 €       | 10.000 €  | 11.000 €  | 61.000 €    |
| Total other costs               | 56.000 €  | 38.000 €  | 9.000 €   | 9.000 €   | 23.000 €  | 31.000 €  | 46.000 €  | 43.025 €  | 255.025 €   |
| Total Budget                    | 614.150 € | 416.133 € | 248.400 € | 248.400 € | 167.540 € | 456.600 € | 413.500 € | 512.699 € | 3.077.422 € |
| Total Funding                   | 307.075 € | 312.100 € | 124.200 € | 124.200 € | 125.655 € | 228.300 € | 310.125 € | 179.445 € | 1.711.100 € |

The biggest part of the total project cost is human resources. Based on our actual budget estimation we will spend 91% for human resource cost. About 7% out of the 91% of the cost will be spent for coordination and project management. The total costs are split in about 49,54 % spend for SME and enterprises, about 16,66% for end user organisations and about 33,8 % will be spend for scientific organisations.

Based on first rough meeting plans, we have reserved about 124K EURO for travel expenses, 42K EURO for consumables, for infrastruFre and depreciation we planned 28K EURO and for subcontracting 61K EURO.

**Used infrastructure and software**

| No | Company Shortname | Usage of infrastructure and software for YouDo   |
|----|-------------------|--|
| 1  | BMOB              | PrivyTV test and development environment (subcontracter PrivyTV)   |
| 2  | AIT               | Electronic lab for prototyping, software development environment   |
| 3  | QG                | End-to-end IPTV/VOD service platform for prototyping and testing (subcontractor Swiss TV, Geneva and/or SKIPA Digital Media, Zurich)   |
| 4  | FHV               | Customer centric design software   |
| 5  | IHL               | iHomeLab facilities, IT-Server infrastructure, electronic prototyping lab, software development environment  |
| 6  | PC                | Personal productivity hardware (PC, smart phone, printer, scanner)<br>Test installation for development and validation of Youdo value proposition extension into smart home / utilization of smart home infrastructure for YouDo key objectives (content presentation, content storage (VoD), support of daily challenges) |
| 7  | MED               | eLearning platform   |
| 8  | DMM               | Caring facilities for elderly people   |

## Section 4: Project impact - exploitation of project outcomes

### 4.1 Demonstration of European wide exploitability

The majority of existing training programs and information for informal carer is organised in form of face to face meetings, class room sessions or it is possible to get the appropriate material in printed format. Because of individual, cultural, socio-economic, welfare system and other differences between European countries, any service for informal carer should ideally be adaptable in order to suit different needs and requirements on different markets. The balance between informal and formal care varies from country to country and changes over time within countries as it is connected to particular political, economic, demographic and cultural factors. In southern Europe, informal care still is the dominant source of home care. Without the work of these unpaid carers, home care would be totally unsustainable and a lot of acute needs would remain unattended. In northern Europe the situation is different. Informal care is less common, because municipalities provide extensive personal care and domestic services. In these countries informal care tends to focus on providing companionship and social support. One example is Scotland, where municipality-funded personal care has replaced some of the intimate personal care formerly provided by close relatives, reducing strain. Research has also shown in other Scandinavian countries (such as Norway) that older people do not want their close relatives to provide their intimate personal care but prefer to have their care and support needs supplied formally by employed care workers. The range of tasks, types and levels of activities that informal carers undertake varies widely both within and between European countries.[9]



The YouDo's project aims at creating a highly customizable portal platform, which is built on a modular system. Different services, customised content and trainings can be added, removed or packaged in various ways in order to suit the requirements of different individuals and different markets. In order to cover the main European country, we would start in the first step with a service offer in German and English. Further languages would follow. But this is not just a language question; furthermore the content has to be adapted per countries as well. By building YouDo not on proprietary solution, but rather on open standards and open interfaces, this greatly enhances the exportability of all services offered.

As the business partners of the consortium represent different markets and different countries, the combined knowledge provides a sound foundation that, together with a modular service and product, will address differing individual, social and organisational needs across Europe. Especially we are happy to count on the experience of Quantos Group, bringing in the know-how and the experience in building and launching large-scale digital media propositions like IP/TV, Video on Demand and Download service, to international markets. The same is valid for the company Procult, which brings in the experience on launching, one of the first Smart Home offers in Europe. Following a worldwide trend for Smart Home Service, first releases are focusing on home security & energy monitoring whereas following releases are focusing on ambient assisted living.

## 4.2 Dissemination, exploitation capability and time to market

### Economic relevance

There is a major transition in demography in Western Europe; older adults are a rapidly growing part of the EU-population. In addition, the average life expectancy will increase. Mostly children live far away from their parents; care is done today partially from professional carer and informal carer. As a large proportion of elderly people suffer from one or several functional disabilities, there is great demand for care services will make it possible for older people to cope with their daily living. In the future, the number of professional carer in relation to people who need a carer will shrink. In order to keep the care costs low, it is also vital that older people can live in their homes for as long as possible, and those informal carers can take apart a big portion of the work instead of being forced to move to nursing homes or health care.

### Exploitation Plan

Mainly there are three types of users who are the target segments for the YouDo service portfolio:

- Informal carer in the most of the cases women in the age of 65 to 85 ("mostly the wife")
- Informal carer in the age of 40 to 65 ("son or daughter")
- Person in need of care, mostly men's in the age of 65 to 85

If we think about starting the exploitation of the YouDo service in about 2015, the older generation (65-85) is still not very familiar (or just partially familiar) with Internet technologies. We are aware that this will change in 10-15 years but in the meantime for this generation the TV-set is probably the most trusted device. But in order to reach them, YouDo will do advertisement in the appropriate newspaper and will use trustworthy persons (doctor, professional care organisations and younger relatives) in order to promote the service. They could recommend YouDo for example after a stroke to possible customers. In case they are interested, they could activate a TV channel with the appropriate care topic. In case they use the Internet with an iPad e.g. they will find all the necessary information on the YouDo Portal in the Internet. The online offer is even a worldwide teaser for example for middle agers to recommend YouDo-TV to their parents.



### Sales approach

The roll-out plan in European countries is mainly driven from the availability of the country specific content, if there is one, the language support for the appropriate content and partially the availability of PrivyTV functionality in the IP-TV network (OTT-Box is everywhere possible). Currently the PrivyTV service roll-out has started in the Netherlands, Switzerland,

Germany and Ireland. In North America, the service is already available. We would start the service in the German-speaking region (DACH), because we can leverage our experience during the YouDo project phase and we took also into consideration that Germany is at least until 2050 oldest country in the world.

Professional carers and hospitals can participate from YouDo through better quality of care and kickbacks, respectively. The individual consortium partners can profit from YouDo as a new source of revenue, they can increase awareness for their own solutions and open up new sales channels for them. Another way to provide YouDo would be retailer shops, like consumer electronics centres. They could offer a YouDo package TV-box and channel in combination or just help the customer to book a channel or selling the OTT (Over The Top) solution, in case in this country the PrivyTV service is not rolled out yet.

### **Potential market**

One thing is constant across Europe: in general Europeans are living longer, expected to gain an extra five years in life expectancy by the year 2050.[1] It is estimated that the number of people aged 65+ will increase by three-quarters between now and 2050. In the same period, the old age dependency ratio is expected to double. [2]

The proportion of the population over the age of 65 will almost double over the next 40 years, from 17% in 2005 to nearly 30% by 2050. The 'really old' (people over 80 years of age) in the EU will rise from 4.1% of the population in 2005 to 6.3% in 2025. [3] In the EU 27, 3% of people state that they care for an elderly or disabled relative several times a week, 4% do it once or twice a week and 8% do so less than once a week.

**Altogether, a quarter of people report being involved in caring for an elderly or disabled relative; amounting to 125 million carers in Europe.**[4] Of those reporting that they care for an older person every day, most carers are in the 50-64 age group (9%), followed by the 35-49 age group (7%).[5] There are estimated to be over one million professional nurses across the EU, compared with the 9.6 million family carers providing 35 plus hours of care per week.[6]

According to Martha Meyer's "*Homecare in Germany*"; caregivers: 80% are women the same age as the person they care for, age > 70 years, Switzerland 250.000, Germany 1.2 Mio.)

In our opinion, the project has a pretty high prospect for the future success on the market: the number of people in need is constantly rising and above mentioned facts are indicating that ratio of professional carers is 1 million to 9.6 million of informal carers. Most of the informal carers face difficulties in caring after elders suffering from dementia: dementia is estimated to afflict over 35.5 million people worldwide -- this includes nearly 10 million people in Europe.[7]

### **Time to market:**

#### **User:**

From the end user point of view (informal carers & older adults), the time is right to start a service like YouDo now. The problem with the aging society, shortage of manpower in the care sector and a constant reduction of budget is already present and will not get better over the years.

#### **Technology:**

By the use of 80% existing technology; iPad, PC-tablets, Modern TV-sets, IP-TV, Internet, content management systems, etc. we do not have to re-invented the wheel. Even for the PrivyTV the rollout has started in Europe. The so-called OTT (over the top) version of PrivyTV gives us a simple second exploitation possibility, in case the IP-TV provider of the appropriate country has not implemented the PrivyTV software yet.

#### **Content:**

So the driver for the time to market is mainly driven from the project itself, the possibility to find appropriate content taking also into account the specific situations in every European country.



The estimated time from project end to market introduction is three years.

### 4.3 Other user segments

YouDo doesn't have to just handle care topics, also elder adults who just want to know all about the topic "Healthy aging" can find information on YouDo.

Having a guide in handling care is not just interesting for elder and their relatives. Other user segments could be also people with chronically diseases and their relatives. This would be a fairly big user group, with representatives of all ages and diseases. They are confronted with the same challenges as the caring relatives of elder people.

It would also be possible to open up a YouDo-label "Lifestyle" for people who want to know how to stay healthy - topics all about sports and nutrition.

Another possible user segment could be parents. YouDo could offer content channels covering topics like pregnancy, childhood, upbringing and education of children, family life and marriage.

### 4.4 Standards

Interoperability and protection of investment can only be guaranteed by a strict orientation on open and established standards. YouDo will base its work on existing standards where possible but aims also to contribute to existing and new standardization activities. With YouDo it is needed to meet standards from various topics.

- EN 980: Graphical symbols for use in the labelling of medical devices
- ISO/IEC Guide 71 (2001): Guidelines for standard developers to address the needs of older persons
- WCAG 2.0 Web Content Accessibility Guidelines
- ISO 9001: As in the area of AAL traceability and minimization of risk is a top-issue, b-mobile is prepared to certify the company to be established for service delivery based on ISO 9001. Business processes will be developed and described compatible to ISO 9001 from the beginning.
- IER Stabdard
- ITIL 2.0
- GMV

Standards for the TV application are:

- HomePlugIEEE 1901 – is a standard for high-speed power line communications. This technology allows computer networks to send data over electrical power lines.
- Wi-Fi802.11a, b, g, n - is a set of standards for implementing wireless local area network (WLAN) computer communication in the 2.4, 3.6 and 5 GHz frequency bands.

Standards for the ambient assisted living and interactive home products are:

- Bluetooth
- ZigBee HA 1.2
- DECT ULE
- Wi-Fi 802.11a, b, g, n

Standards in the care topic are divided in two groups' universal standards, which are internationally valid and handle mostly ethical and quality assurance topics and national standards for the different countries.

Since the health care reform in Germany (2008) expert standards are an obligation for care institutions. The overall standards from the ministry of health are regarding the following topics:

- Dekubitusprophylaxe in der Pflege (decubitus prohphylaxis)

- Sturzprophylaxe in der Pflege (fall prevention)
- Schmerzmanagement in der Pflege (pain management)
- Entlassungsmanagement in der Pflege (discharge management)
- Förderung der Harnkontinenz in der Pflege (promoting urinary continence in nursing)
- Pflege von Menschen mit chronischen Wunden (care of people suffering from chronic wounds)
- Ernährungsmanagement zur Sicherstellung und Förderung der oralen Ernährung (nutrition management to ensure and promote oral nutrition)
- The expert standards for dementia are being developed and have not been published.

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- [3] (Population Projections provided through EUROPOP2008 convergence scenario from Eurostat (2008) Europe in Figures – Eurostat Yearbook 2008. Luxembourg: Office for Official Publications of the European Communities.)
- [4] (Glendinning, C., F. Tjadens, H. Arksey, M. Moree, N. Moran and H. Nies (2009) Care provision within families and its socio-economic impact on care providers: Report for the European Commission DG EMPL Negotiated Procedure VT/2007/114. York: SPRU, University of York in collaboration with Vilans Centre of Expertise for Long-Term Care, Utrecht.)
- [5] Anderson, R., B. Mikulic, G. Vermeulen, M. Lyly-Yrjanainen and V. Zigante (2009) Second European Quality of Life Survey Overview. Dublin: European Foundation for the Improvement of Living and Working Conditions.
- [6] (Rothgang, H., R. Becker, K. Knorr, O. Lessmann and A. Timm (2006) Socio-economic report for the core countries: Executive Summary: Eurofamcare. Bremen: University of Bremen, EFN (2003) Position statement on Recruitment, April (reviewed June 2007); referred to by Glendinning et al (2009)
- [7] From the 2009 World Alzheimer's Report:<http://www.alz.co.uk/research/worldreport/>
- [8] Charter of Fundamental Rights of the European Union (2000/C 364/01), O.J. No. C 364, 18. December 2000 p. 1 – 22.
- [9] Home Care in Europe (WHO, 2008)

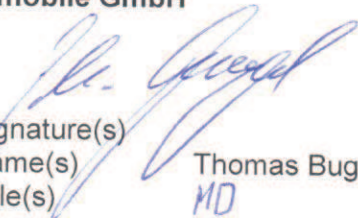
## Section 12: Signatures

This *Consortium Agreement* may be executed in any number of counterparts, each which shall be deemed an original, but all of which shall constitute one and the same instrument.

AS WITNESS:

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

### b-mobile GmbH

  
 Signature(s)  
 Name(s) Thomas Bugal  
 Title(s) MD  
 Date 9 April 14

### AIT AUSTRIAN INSTITUTE OF TECHNOLOGY GMBH (HEALTH & ENVIRONMENT DEPARTMENT)

Signature(s)  
 Name(s) Anton Plimon  
 Title(s) Geschäftsführer (AIT)


  
 Date Michaela Fritz  
 Prokurist (AIT)

AIT Austrian Institute of Technology GmbH

25. FEB. 2014

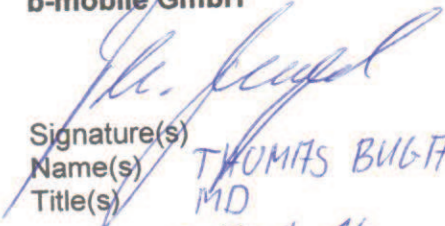





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**b-mobile GmbH**

  
Signature(s)  
Name(s) THOMAS BUGFAL  
Title(s) MD  
Date 9. April 14

**Quantos Group AG and**

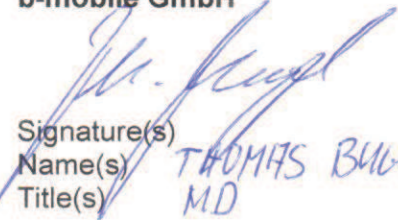
  
Signature(s)  
Name(s) WALTER JUCKER  
Title(s) CHAIRMAN  
Date 31.03.2014

  
UWE PLACZEK  
CEO  
31.03.2014

AS WITNESS:

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

**b-mobile GmbH**

  
Signature(s)  
Name(s) THOMAS BUEHL  
Title(s) MD

Date 9. April 2014

**Procult Consulting (Schweiz) GmbH**

  
Signature(s)  
Name(s) DOETSCH MARKUS  
Title(s) PARTNER

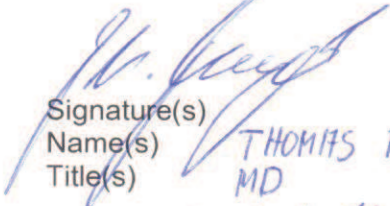
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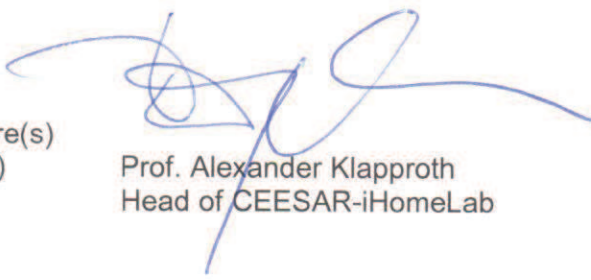
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**b-mobile GmbH**

  
 Signature(s)  
 Name(s) THOMAS BUCHTL  
 Title(s) MD  
 Date 9. April 14

**Lucerne University of Applied Sciences and Arts – Engineering & Architecture  
CEESAR-iHomeLab**

  
 Signature(s)  
 Name(s) Prof. Alexander Klapproth  
 Title(s) Head of CEESAR-iHomeLab  
 Date

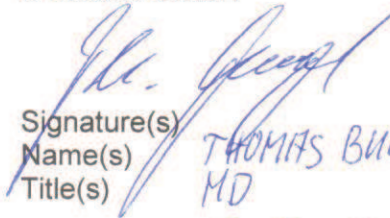
  
 Prof. Dr. Andrea Weber Marin  
 Vice Director  
 Head of Research



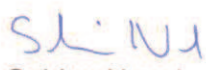
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Name(s) THOMAS BUGATZ  
Title(s) MD  
Date 9. April 14


**Diakonie München-Moosach e.V.**

  
Signature(s)  
Name(s) Sabine Nagel  
Title(s) 2. Vorsitzende  
Date 27.11.2013

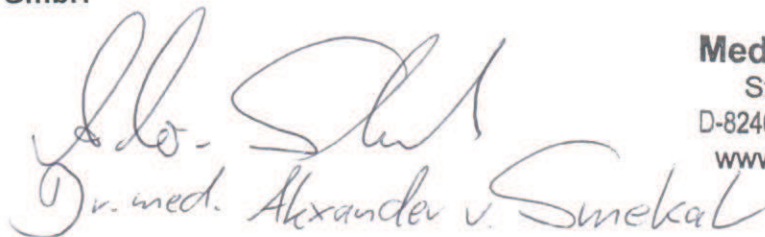
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**b-mobile GmbH**

  
Signature(s)  
Name(s) THOMAS BUGFEL  
Title(s) MD  
Date 23.4.14

**Meditrainment GmbH**

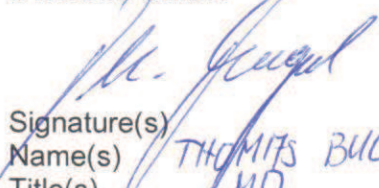
  
Signature(s)  
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Date 7.4.2014

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St. Martin-Straße 2c  
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AS WITNESS:

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**b-mobile GmbH**

  
Signature(s)  
Name(s) THOMAS BUGRAL  
Title(s) MD  
Date 09. April 2014

**Fachhochschule Vorarlberg**

Signature(s)  
Name(s) Mag. Stefan Fitz-Raukel  
Title(s) CEO  
Date 27.11.2013

