

AAL Programme



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**AAL Programme:
Safety of Elderly People and Vicinity Ensuring
"SAVE"**

**Deliverable: D.4.1 Report
Business Base Assessment and Opportunity Analysis**

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Prepared by: Mr. Andras Hazai (Ikontent) – Exploitation Manager
Submitted by: UnitBv – Coordinator

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1. Deliverable summary

This deliverable collects and summarizes the most important steps were taken by Consortium members on how the results of SAVE will benefit them and beyond the project. Further goal of the **Business Assessment And Opportunity Analysis** is to discover the existing services on the elderly care market. Another goal of this research is to find the position of SAVE's future product between the competitors in Romania, Italy and Hungary.

2. Objectives

The ultimate aim of this deliverable is to gather the individual concepts of partners regarding the business opportunities inherited in the foreground of the SAVE project. The main objective of this task was to prepare the groundwork for further exploitation of the results. The information gathered by the partners in this task, through a thorough and periodic market watch will be used to prepare the future business plan.

3. Business assessment and opportunities analysis

3.1 Background information

The intermediate BUSINESS PLAN intends to make clear how the partners, both as a consortium and as individual organizations, intend to use and disseminate the results of the work. The initial scope, planned measures and the time scale for dissemination and transfer of the technology to other organizations are included in WP4 Business Exploitation.

Company Description

Business Name	SAVE – AAL spin-off company – not yet funded
Company Mission Statement	Using a holistic approach SAVE – AAL wish to create a highly automated telemedicine/alerting system that covers most of the needs of the elderly peoples often live with dementia.
Company Philosophy/ Values	Go beyond care: Supporting people's changing needs—social, emotional, housing, and more—as they age and meeting them in the places they spend most of their lives (their homes, communities, work, retail settings) will likely be critical as companies shift to focus on
Company Vision	SAVE – AAL's vision is to create a financially sustainable, still inclusive service for high number of individuals of the ageing society, thus improving their life-quality.

Goals & Milestones	<ol style="list-style-type: none"> 1. Defining the services. 2. Development and testing/piloting 3. Creating a distribution system
Target Market	<p>Primary: Home caregivers, Caring Homes, Family Members, End Users</p> <p>Secondary: Technology Service Providers (Mobile Phone, Internet, Smart Home)</p> <p>Tertiary: Healthcare Systems, Insurance Companies</p>
Industry/ Competitors	<p>A system built on sustaining well-being rather than treating disease could lead to changes in the solutions that companies bring to the market. Business models built around the assumption that costs will rise as people age may not survive this transition. Leading companies should have a strategy for devising new solutions to meet these changing needs.</p>
Legal Structure/ Ownership	<p>The SAVE – ALL spin-off company is planned to be funded by the end of the 36 month-long program. Ownership details are the subject of future negotiations of the members of the consortia. The legal structure will be a for-profit private company.</p>

3.2 CANVAS business models for SAVE

A Business Model has been developed to describe how the product service will create, deliver and capture the value of the innovation and will consider the market, economic, social, and other contextual factors across Europe.

The preliminary title for this goals are the SAVE infrastructure system and the SAVE training and distribution network.

The SAVE infrastructure system (SAVE-IS) encompasses multiple active and passive user interfaces like terminals and sensors, combined with a processing unit, allowing analysis and support of the elderly end-users.

The SAVE training and distribution network (SAVE-TDN, see below) is the set of external partners who initiate business and provide first level support.

Key partners	Key activities	Value propositions	Customer relationship	Customer segments
Members of the SAVE-TDN Partners of the SAVE project Hardware distributors Public partners, especially social security partners	Maintenance and improvement of SAVE solutions. (Re-)Evaluation of the system with potential end-users Marketing	Improved self-management and self-reliability of the elderly users Information for quality assurance and improvement of care Indicators for the assessment of the user's health status.	Personal customer care via SAVE-TDN Second level support if necessary	Elderly end-users Caregivers
	Key resources		Channels	
	SAVE solutions developed in the project. Resources of business partner for the first 24mo Access to end-users via care-giving partners		SAVE-TDN Awareness: Conferences, fairs, online marketing	
Cost structure		Revenue streams		
Investment for 1,650 installations: Hardware: EUR 2,475,000 SAVE-TDN: EUR 618,750 Running cost per year for 1,650 installations:		One-time investment: EUR 1,875 (net) Monthly subscription: EUR 25 (net) ROI: 1,650 installations, planned after 24 months (Regional pricing will be considered)		
Total personnel costs: EUR 388,000 SAVE-TDN: EUR 99,000 Budget for evaluation expenses and additional marketing efforts: EUR 19,000				
SAVE infrastructure system (SAVE-IS) Business Model Canvas May 26th 2018				

The SAVE training and distribution network (SAVE-TDN) aims at caregivers, care-centres, general practitioners (GP), volunteer associations, resellers, tradespersons and private experts who initiate new business and provide first level support.

Key partners	Key activities	Value propositions	Customer relationships	Customer segments
IKONTENT: Hungarian regional distribution partner Labidee: Italian regional distribution partner VS: Romanian regional distribution partner EVA+IKONTENT: Platform provider, billing, contract management, online training	Training and education Accounting services Contract services	20% participation on net-turnover Reselling a trustworthy, well-maintained product Collective marketing efforts Second level support	Direct personal contact with the regional distribution partners Informatio, training and events	Business partners and resellers Professional caregivers Volunteer associations and private experts
	Key resources		Channels	
	EVA+IKONTENT platform solution Legal experts Accounting experts	Passive income Billing and contracting services	EVA+IKONTENT platform solution for distribution networks. Second level support Monthly newsletter	
Cost structure		Revenue streams		
20% of all SAVE-IS related net-turnover will be paid to the distributors in a suitable manner, this also includes monthly subscription (=passive income). All monetary costs have to be covered by SAVE-IS sales and subscriptions and are included there.		The SAVE-TDN is responsible for generating the SAVE-IS turnover and also provides first level support and training of end-users.		
SAVE training and distribution network (SAVE-TDN) Business Model Canvas May 26th 2018				

3.3 SWOT Analysis

	Strengths	Weaknesses	Opportunities	Threats
Product/ Service Offering	Flexible, expandable system	Long go-to- market time	Apply of the latest trending technologies	No first-mover benefit
Brand/ Marketing	<ul style="list-style-type: none"> • Understandable services • Easy targeting 	Low marketing budget	Opening to caring homes / public healthcare systems	Slower dissemination
Staff/HR	International team with wide range of skills	Physical distance of the participants	More countries means larger market reach	Insufficient / slow communication
Finance	SAVE is financed by the EC's AAL Programme	<ul style="list-style-type: none"> • No revenue in the first 24 months • Pilot budget 	Involving Venture Capital / Local grants of different stakeholders	First revenue comes later than planned
Operations/ Management	Experience in grant management	Physical distance of the participants	Departments has wider independency	Insufficient / slow communication
Market	Continuously growing number of end users	Low purchasing power of the elderly in the Eastern European region	Generic longevity means longer service subscription	General technology non-use of older people
Can any of your strengths help with improving your weaknesses or combating your threats? If so, please describe how below.				
Most of the threats can be mitigated with efficient project management.				
Based on the information above, what are your immediate goals/next steps?				
<ul style="list-style-type: none"> • Project dissemination towards stakeholders must be start already in this early stage. • Pre-contracting 				

4. Exploitation Agreement

Participants of the SAVE consortium intend to manage IPR ownership and user rights among themselves in their own best interest. Ownership and protection of information and IP will be adequately protected.

Core IPR related issues will be managed as follows:

End-user/Patents: Each new patent developed under the project will be disseminated to the partners. The access to intellectual property rights will be discussed during the meetings of the Project Management Board (PMB). Patents resulting from common foreground of the project will conduct to common patents.

Management of IPRs and knowledge: IPR issues and knowledge sharing will be managed by the PMB, supported by an appointed Project IPR manager, in line with the guidelines and processes defined by the EC, the IPR helpdesk, and other bodies. The PMB and the IPR manager will provide recommendations to improve the processes or to solve concrete problems linked to e.g. use of knowledge, IPR and access rights. If necessary, other project participants will also participate in IPR related interventions through small ad-hoc IPR working group. Finally, IPR exploitation will be considered in detail by the business plan developed by the end of the project.

5. The market of SAVE

5.1 The product

The SAVE system is an incorporated solution that main goal is to support end-users in staying in their familiar surroundings for as long as possible, while still be safe and optimally cared for. Secondly SAVE supports informal caregivers, like relatives, in providing optimal care for their wards, while maintaining their professional and private life. Additionally, SAVE enables professional care-givers in the development of an optimal support planning and achievement, involving also volunteering associations.

The target market for these technical innovations are: (i) elderly people, age-related chronic illness, people with mild dementia or with disability, and other impairments, (ii) informal caregivers, like family members; (iii) formal caregivers, social-care organisations, nursing homes and volunteer organisations

Product and Service Description

Business Name	SAVE – AAL spin-off company
Product/ Service Idea	SAVE – AAL System is a highly automated telemedicine/alerting system that covers most of the needs of the elderly peoples often live with dementia.

Special Benefits/ Unique Features	SAVE – AAL System is the integration of existing components that are available on the market. The systems flexibility allows the easy integration of the trending / upcoming new technologies.
Production and Delivery	The SAVE – AAL System is the integration of off-the-shelf hardware components and the proprietary software of the consortia. Delivery of the final system is scheduled by the end of the 36 AAL Programme.
Suppliers	OEMs (Original Equipment Manufacturers) of hardware and sensor components Telecommunication Service Providers Cloud Server Infrastructure Providers
Intellectual Property Special Permits	The resulting IPs of the development will be the property of the members of the consortia.
Product/ Service Description	In this phase of the project the service list is not closed. A large number of possible services will be evaluated. Such services could be: Personal Emergency Response Systems, Fall Detection, Life Function Monitoring, Health Data Handling, Monitoring and Motivating Activity of Daily Living, Wander Prevention, Environmental Monitoring (Temperature, Smoke, Water Leaking), Medication Management, Lost Item Tracking, Mobility and Micro-mobility, and Care Worker Safety.

5.2 Market analysis

In the European Union about 10 millions elderly suffer from mild cognitive impairment (MCI), these people and their next of kin require adequate support during daily activities. The technical solutions in SAVE will be selected to ease the tasks involved in caregiving, improve the quality of care and most importantly support self-reliability of elderly.

In 2016 Europe (EU 28) 30,337,149 elderly over 65 lived in a single household. About 20% or 6,000,000 of these suffer from mild cognitive impairment (MCI) and could greatly benefit from SAVE solutions and are thus considered the primary target group for this analysis. The most comparable market is the smart home market where the household penetration in Europe is 9.4% and is expected to hit 21.7% in 2022. Assuming an uniform distribution only 1,302,000 of the 6,000,000 are already supplied with smart home solutions in 2022. We have 4,698,000 potential customers just in the primary target group up to this analysis.

The target market for these technical innovations are: (i) elderly people, age-related chronic illness, people with mild dementia or with disability, and other impairments, (ii) informal caregivers, like family members; (iii) formal caregivers, social-care organisations, nursing homes and volunteer organisations. The technical innovation will become a supportive part of the individual's life

optimising caregiving resources and preserving as much as possible the familiar environment in which the end-user can exercise his autonomy and self-management.

A thorough understanding of the existing and emerging competition is key to the successful development and positioning of innovative products. These will be an integral part of the business plan for SAVE that will take into consideration: the numerous similar products and services competing on the market; their specific characteristics, stage of development and market penetration in comparison to SAVE; new competitors emerging during the course of the project; scalability being the key deficiency. A first release of SAVE products is expected to reach the market shortly after project closure. Envisaged cooperation between the industry partners and contributors will be defined along project implementation. Licensing agreements are foreseen to allow for the integration of technologies into the joint system that are protected by IPR or forming the background knowledge of some of the partners.

5.4 Market Objectives

The market segmentation for the SAVE products is the following:

Primary target groups - end-users (elderly and/or with mild dementia and/or with disabilities) and caregivers (at the family and volunteering level)

Secondary target groups - companies (solution providers and dealers)

Tertiary target groups - social / municipal organizations and community centres (caregivers at institutional level)

Primary end-users are 65+ elderly persons possibly suffering from mild dementia and/or with disabilities, whereas secondary end-users mostly include formal and informal caregivers (family and volunteering). It is to be stressed that the spectrum of needs of such users is evidently too broad to be realistically taken care of in its entirety within the framework of this project. This, on the one hand, implies that SAVE services will address a specific segment only within the larger picture, focusing on smart monitoring and caregiver support. On the other hand, it emphasizes further the need of framing the SAVE vision within a wider, holistic perspective, matching the overall social and health care strategies. Stakeholders' role is hence to firmly hook the SAVE design at actual needs and features of social and health care systems and to look after pertinence and sustainability of the proposed solution. Stakeholders representing different view angles are hence involved, including private care providers, public social services, end- users organizations, medical and nursing researchers, family members. Even the user-profile is quite broad, and we define strict inclusion and exclusion criteria for making the proposal value more perceivable, as depicted below.

The project addresses almost-fit elderly people (both genders), suffering from moderate medical conditions or moderate impairments (movements; memory; communicating; hearing; mental health; social relationship) dealing with (or being at risk of) age-related issues, including frailty, mild mental health ailments and cognitive decline living alone and home dealing with intermediary prevention of institutionalization.

6. The competitors of SAVE

While big players like Amazon arrived in the smart home market for regular consumers, in the smart health segment of smart homes start-up companies yet dominate the market. Thus we have multiple

competitors, or even potential partners, without the reach to displace the SAVE partnership before it enters the market.

We made a detailed competitor analysis in the participants' countries of the SAVE consortia.

6.1 Italy

We identified and evaluated two major competitors who offer their elderly care services in Italy.

Levstone is a UK company who offers a smartphone app that offers helps elderly people to keep their independence by offering self-care, prevention and alerting services.

<http://levstone.com/>

<https://play.google.com/store/apps/details?id=com.levstone.mobility.trustedelderlycare>

Doro is an Italian company who offers elderly friendly smart, and household phones and 24/7 assistance to their users via their "alarm centers" with a qualified health personnel.

www.doro.com

Competitor Data Collection - Italy

	SAVE AAL	Levstone	Doro
Price	Not yet available	1,69 € - 5,99 € for item	From 199,99 to 229,99 all inclusive telephone and services
Benefits/Features	Wider range of services than competitors have	App no ADS. Multisensory technology.	The first purpose is to simplify the use of the smartphone for elder. Moreover, help service and remote assistance with the app.
Size/profitability	Competitive pricing	The app is free, purchases in the app	Services included in the price of the telephone
Market strategy	Marketing via institutions and insurance companies.	Only responses to customer reviews on Google Play	Site, e-mail, Youtube, social media, telephone, Amazon, physical stores.

Competitive Analysis Worksheet - Italy

FACTOR	SAVE AAL	Levstone	Doro	Importance to Customer
Products	S	S	W	1
Price	S	S	S	3
Quality	S	S	S	2
Selection	S	W	W	3
Service	S	W	S	1
Reliability	S	S	S	1
Stability	W	S	S	2
Expertise	S	S	S	3
Company Reputation	W	S	S	3
Location	S	W	W	5
Appearance	S	S	S	3
Sales Method	W	S	S	1
Credit Policies	N/A	W	S	1
Advertising	W	W	S	2
Image	S	S	S	2

6.2 Romania

We identified and evaluated three major competitors who offer their elderly care services in Romania.

Butonul Rosu offers elderly friendly smart devices and alarm services with a simply to use “Red Button”.

<https://butonulrosu.ro/>

Telekom's Smart Home solutions provide a complete ecosystem for home monitoring and control, remotely. They also offer a solution that allows to locate patients in the hospital, with the help of bracelets, which are equipped with a panic button in case of emergencies.

<https://www.telekom.ro/business/sanatate/>

TELEASIS scope is to develop a model for medical and social telecare, effective regarding the cost, also the innovative info–communications technologies and the devices that allow to achieve this. Their unified health services system offers:

- Private management of lifestyle for elders, implicitly the health/illness.
- Increasing the sense of responsibility of the beneficiary for this services relating to their own health (conformity)
- The improvement of lifestyle quality, implicitly the chronic illness treatment
- Increasing the operation's efficiency in the care institutions, in medical or social terms
- The improvement of the professional activity of the audience at home
- Constant communication between participants and mobile devices.

<https://teleasis.ro/>

Competitor Data Collection - Romania

	SAVE AAL	Butonul Rosu	T+Sanatate	Teleasis
Price	Not yet available	10 USD/ month	N/A	N/A
Benefits/Features	Wider range of services than competitors have	SOS GPS location Advanced care	Telemedicine and tele emergency	Advanced home care givers telemedicine

Size/profitability	Competitive pricing	N/A	Country size, online platform	N/A
Market strategy	Marketing via institutions and insurance companies.	Online stores Personal website	"No place like home" Personal website	Presentations

Competitive Analysis Worksheet - Romania

FACTOR	SAVE AAL	Butonul Rosu	T+Sanatate	Teleasis	Importance to Customer
Products	5	5	2	1	1
Price	N/A	5	N/A	N/A	3
Quality	5	5	5	1	2
Selection	3	4	2	1	3
Service	S	3	2	1	1
Reliability	5	5	5	1	1
Stability	2	2	2	1	2
Expertise	5	3	2	1	3
Company Reputation	2	1	5	1	3
Location	5	4	4	1	5
Appearance	5	5	3	1	3
Sales Method	2	5	1	1	1
Credit Policies	N/A	N/A	N/A	N/A	1

FACTOR	SAVE AAL	Butonul Rosu	T+Sanatate	Teleasis	Importance to Customer
Advertising	2	5	1	1	2
Image	4	5	1	1	2

6.3 Hungary

We identified and evaluated three major competitors who offer their elderly care services in Hungary.

Vodafone with Private Sentinel (Prodexp Ltd.) offers a so called “Senior Smart Watch” and alarm services with an easy-to-use alarm button. Main functionalities are:

- Voice calls
- Location services
- Pulse and blood-pressure measurement
- SOS notifications
- Perimeter watching
- Step counter

<https://www.vodafone.hu/mobiltarifak/family/senior-okosora>

National Ambulance Service (with Vodafone Foundation) offer theirs’ “Life Saver Application”. It also shows locations of the pharmacies, hospitals, and defibrillators. The Life Saver Application calls are classic emergency calls, but as soon as you receive a call, a digital data packet will be visible at the receiver. The application is available for free to the customers of all Hungarian mobile service providers.

<https://play.google.com/store/apps/details?id=hu.mentok.eletmento&hl=en>

SOS Centre Ltd. offers a very simple and easy to use portable device that has only one button. Despite its’ simplicity the device offers a variety of services:

- Voice calls
- Location services
- SOS notifications
- Perimeter watching
- Fall detection

<https://www.soskozpont.hu/seni-guard-keszuelek>

Competitor Data Collection – Hungary

	SAVE AAL	Vodafone +PS	National Ambulance	SOS Centre
Price	Not yet available	8 EUR/ month	Free app (needs a smartphone)	137 EUR/ device plus 13 EUR / month
Benefits/Features	Wider range of services than competitors have	SOS GPS location Advanced care	Telemedicine and tele emergency	Very easy to understand usage and services
Size/profitability	Country size, online platform	Country size, online platform	Country size, online platform	Country size, online platform
Market strategy	Marketing via institutions and insurance companies.	Via Vodafone	Via Vodafone	Online marketing

Competitive Analysis Worksheet – Hungary

FACTOR	SAVE AAL	Vodafone +PS	National Ambulance	SOS Centre	Importance to Customer
Products	5	5	4	5	2
Price	N/A	5	5	3	4
Quality	5	4	4	4	3
Selection	3	4	2	1	3
Service	5	4	3	4	1
Reliability	5	5	5	4	1
Stability	2	5	5	3	2

FACTOR	SAVE AAL	Vodafone +PS	National Ambulance	SOS Centre	Importance to Customer
Expertise	5	5	5	4	3
Company Reputation	2	4	5	3	3
Location	5	5	5	5	5
Appearance	5	5	5	2	3
Sales Method	2	5	5	3	1
Credit Policies	N/A	N/A	N/A	N/A	1
Advertising	2	5	5	3	2
Image	4	4	5	2	2

7. Business Plan

At present the consortium estimated the cost target for the device as per the below.

7.1 Cost estimation

At this phase of the project we don't have the final list of services that will affect the pricing. The final business plan will be ready by Month 17, when all the necessary information will be available. External stakeholders are data protection agencies and medical device certification agencies who have to agree to our solution or declare non-jurisdiction. Hardware manufacturers (who are often start-ups in this branch) also have to be sufficiently prepared to be able to fulfil orders when necessary.

The estimated costs are outlined in SAVE infrastructure system (SAVE-IS) Business Model Canvas May 26th 2018. Hardware-costs and the costs of the SAVE-TDN are mainly pass-through costs, the remaining 388,000 EUR are mainly personnel costs, which have to be borne by the business partners until we reach breakeven after 24 months.

7.2 The commercial route

The commercial route for exploitation results is via direct activities of Consortium members, as well as licensed activities of third-party organizations.

In generic technical SME partners will initiate technology exploitation by producing, marketing, and distributing the SAVE system. Manufacturing rights (if any) will be restricted to Consortium partners

until market demand exceeds their capacity, at which point external licenses will be granted to augment production. Licenses will also be granted to external SMEs to increase SAVE distribution, as the market demands. In each case, licensing agreements must ensure that partner competitiveness is not jeopardized.

The partners agreed in the following scheme:

EVA and IKONTENT will take lead in the marketing and distribution activities after the project.

IKONTENT will also be the main regional distribution partner in Hungary.

Labidee will be the main regional distribution partner in Italy. INRCA will contribute to present the system to relevant stakeholders in Italy and collaborate with Labidee.

VS will be the main regional distribution partner in Romania.

EVA+IKONTENT will also contribute its existing platform solution for training and distribution networks and help setting up such a network.

ISS and UNITBV will be regional partners in Romania, supporting VS's efforts.

INRCA will be a regional partner in Italy, supporting Labidee's efforts.

NIMR, UNITBV (together with DSA) and INRCA are caregiving partners, who will provide SAVE with access to potential end-users and their requirements.

ISS, UNITBV and VS will lead technical innovation follow-up projects in order to expand SAVE's capabilities.

7.3 Financial considerations

The income will be generated by selling through distributor(s), and sub-sublicensing. From the revenue generated, the cost of sale and fabrication will be paid, then the background IPR (background royalties) will be paid to the partners on agreed business basis.

The remaining profit (if any) will be shared based on the total own effort invested by each SMEs.

The profit on the maintenance will be shared based on the total own effort invested by each SMEs.

8. Dissemination

As per the Dissemination Plan the following dissemination actions have been will be conducted up to Month 17:

The primary dissemination channel is the project website (www.save-aal.eu) which provides general information about the Project, a description of the partners, the major objectives and news. The website also contains a restricted section in order to facilitate exchange of information and communication between the partners. Newsletters on the website ensure that subscribers and people interested in the project progress are up-to-date.

The consortia will develop the following marketing tools to ease the dissemination:

- SAVE flyer
- SAVE poster
- SAVE press release
- Newsletter

Synergies with other websites

In order to increase the online public visibility of SAVE, several websites were approached offering project synergy benefits with them.

Part of the dissemination will be the presence on conferences and other events, where potential partners could be shown up.

9. Conclusions

All activities will be addressed and developed in line with the targeted achievements. This BUSINESS BASE ASSESMENT was prepared by the consortium, introducing the possible market segments with a detailed geographical analysis, taking into consideration technological, economical and socio-cultural trends. The competition of SAVE (Europe and Worldwide) is also introduced in this document with the comparison to the SAVE future prototype. Also it is detailed one by one how the SME partners individually will exploit the results after the project. The dissemination actions throughout the project's 3 years are also described in the deliverable.

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