

**TENDER PROCEDURE AIMED AT THE DEVELOPMENT AND PROVISION ON THE WEB OF A DIGITAL PRODUCT/SERVICE IN FAVOUR OF CITIZENS, OPERATORS AND ENTITIES PARTICIPATING IN THE TRIAL TEST IN THE ROME AREA OF THE CROSS PROJECT, REFERRED TO AS APP4CROSS.**

**PREAMBLE (SUPPLEMENTING THE NOTICE)**

Consorzio Cross benefits from EU funding for the development of the European Project called Cross (resolution of 07/12/2012 export code no. 2012 06817/019) within the scope of the European programme CIP, ICT-PSP aimed at the implementation of the Smart Cities policies that constitute one of the pillars of the 2020 Europe Agenda.

The European Commission Directorate overseeing the development of the project has already informally indicated some desirable developments of CROSS in the direction of the SEPA (Single European Payment Area), of the eGovernment and Future Internet. The trial test will take place in Rome, Turin, Sevilla and Manchester. In each city the activities will directly involve the Municipality, a service company, and selected third-sector associations. The end users involved overall will be over 300,000.

The aim of the project is to promote an innovative ecosystem capable of generating digital services and applications through the use of information generated by the users. CROSS recognises the untapped potential of services and applications in the non-monetary economy, an emerging sector of the digital single market with prospects for sustainable, inclusive and smart growth, which is giving rise to new demands and practices.

In a resolution handed down in 2008, the European Parliament identified volunteering as "possibly the most sustainable type of renewable resource", thereby encouraging Member States and local and regional authorities to "recognise the value of volunteering in promoting social and economic cohesion" (European Parliament, 2008).

The European Commission declared 2011 as the European Year of Voluntary Activities, in an attempt to "raise awareness of the importance of volunteering" (Council of the European Union, 2009).

The Comunità di S.Egidio ACAP (Associazione Cultura Assistenza Popolare) Onlus (hereinafter CSE) (tax code 80191770587) with registered office in Rome, piazza S. Egidio 3a, is a member of Consorzio CROSS and is actively engaged within the scope of volunteering and social services.

The Consorzio's coordination, in agreement with Municipio Roma I, has recently identified CSE as the entity to which to entrust the development of an APP (IT

application for smartphone and web) capable of interfacing with the Technology Platform managed by Poste Italiane.

Municipio Roma I, partner of Consorzio Cross and Nodo di Roma (the new railway hub project in Rome), will contribute to the realisation of the APP by paying the sum of 30,000.00 (thirty thousand,00) Euro, including VAT, to the entity designated as winner of the tender, which were allocated to Municipio Roma I by the European Commission for the same purpose. The Municipio Roma I has undertaken a commitment in this regard with managerial determination n.2579/2013 (12/20/2013) – prot.n°118566/2013 (12/20/2013).

The APP shall form part of the “Nodo di Roma” project, in order to support the initiatives aimed at: raising awareness on volunteering as a key renewable resource for the solution of social issues; improving the user experience for the social services provided by some public structures through profit and no-profit organisations distributed across the territory; keeping track of the social services provided to citizens, for a more efficient scheduling of the same.

More specifically, the task assigned to CSE is aimed at the design and development of an App which:

- 1) helps improve volunteer management;
- 2) documents the extent, role and importance of the non-monetary economy as a significant part of the wider economic framework;
- 3) ensures visibility to a large portion of the workforce that is currently not accounted for in existing employment statistics;
- 4) helps to enhance the public and private initiatives aimed at boosting voluntary activities;
- 5) helps to encourage public policies aimed at increasing the sustainability of public services
- 6) provides users with faster and higher quality access to the Services available to them.

CSE is not able to autonomously develop the said App and, therefore, it intends to the exercise the subcontracting option provided for in the grant agreement N. 325141 (11/15/2013) within the scope of the European Project CROSS.

Since CSE does not possess the technical skills required to identify the specific content of the APP such as to enable the attainment of the afore-mentioned objectives, and in view of the data made available by the Consortium it belongs to, it intends to rely on the expertise of the Project Partners and of Poste Italiane in particular, which shall coordinate the technical aspects of the project. The successful bidder shall report to and coordinate with Poste at each stage of the activities referred to in Clause 3 hereunder.

## **CLAUSE 1 OBJECT OF THE CONTRACT**

CSE, hereinafter also referred to as the “Principal”, intends to assign the development and provision on the web and on smartphones of an application (hereinafter referred to as the Mobile APP) which should be compatible with the most common operating systems for mobile devices (Android, iOS, Windows Phone), and of a corresponding Web application (hereinafter referred to as the Web APP) interfacing with the technology platform of the CROSS Project managed by Poste Italiane (within the scope of which the Mobile APP and the Web APP shall be distributed) through a set of Web Services made available through the project itself for the purpose. The documentation relating to these Web Services and the relevant supporting technological components (files associated with the corresponding WADL – Web Application Description Language – and WSDL – Web Service Definition Language – modules ) shall be shared with the app developer who shall be awarded the contract. The Mobile APP and Web APP Applications (hereinafter, Product/Service) shall be provided to citizens, operators and entities involved in the trial test in the Nodo di Roma hub within the scope of the activities of the CROSS European project (CIP 324151 [www.crossproject.eu](http://www.crossproject.eu)), hereinafter referred to as the “Users”.

### **1.1 TERM OF THE CONTRACT**

The activity assigned to the entity to be entrusted with the supply of the product/service (hereinafter also referred to as the “Provider”) consists in the development, supply and provision of the Product/Service through the Provider’s technical means and personnel for one calendar year starting from the supply of the service pursuant to Clause 3 hereunder.

### **1.2 VALUE OF THE CONTRACT**

The maximum amount of the fee for the Product/Service covered by this tender is set at € 100,000.00 (one hundred thousand,00), VAT included and other charges required by the law.

Bids in excess of the said amount shall not be taken into consideration.

## **CLAUSE 2 FEATURES OF THE PRODUCT/SERVICE**

The Product/Service shall require the development and distribution of a mobile App and of a Web Application, allowing users to gain access through desktop applications, smartphones and/or tablets and to make use of added-value services compared to the enabling features provided by the service platform, hereinafter referred to as “Technology Platform”, managed by Poste Italiane (hereinafter

referred to as the “Provider”) in the interest of the CROSS project. The main features of the Technology Platform are described in the Technical Annex (document APP4CROSS\_Technical\_Annex). The same document also contains a simple scenario of some of the features that shall need to be provided by/managed through the Product/Service.

## **2.1 SCENARIO FOR THE USE OF THE PRODUCT/SERVICE**

Any tenderer wishing to respond to the call for tenders and participate in the tender procedure (hereinafter referred to as the “Tenderer”) is required to submit, in the manner specified in Clause 5 hereunder, documents that shall be hereinafter referred to as the “Documentation in response to the tender”. In its Documentation in response to the tender, the Tenderer shall describe the scenario for the use of the Product/Service, with detailed information on possible interactions among the key players specified in the technical annex and in compliance with the specifications set out in the preamble.

## **2.2 FUNCTIONAL CHARACTERISTICS OF THE PRODUCT/SERVICE**

In its Documentation in response to the tender, the Tenderer shall clearly specify the functionalities (basic and otherwise) of the Product/Service and the methods with which these can be accessed by users as well as integrated into the technology platform of the CROSS Project managed by Poste Italiane (hereinafter, the “Technology Platform”).

## **2.3 NON-FUNCTIONAL CHARACTERISTICS OF THE PRODUCT/SERVICE**

The Documentation in response to the tender must clearly specify the non-functional characteristics of the Product/Service. Mention should be made, by mere way of example, of the following:

- security related aspects;
- quality of the Product/Service offered;
- method of managing the proposed Product/Service.

## **CLAUSE 3 DEVELOPMENT AND SUPPLY OF THE PRODUCT/SERVICE**

### **3.1 PROJECT MANAGEMENT**

Once the tender has been awarded, the Principal shall set up a Project Management team including a representative of the Provider, two delegates for the Principal, a representative of Roma Capitale-Municipio1 and the technical and scientific coordinator of the CROSS project. Following the awarding of the tender, which shall take place subject to the terms and conditions referred to in Clause 7, the

successful bidder shall be required to carry out the activities in coordination with the Project Management.

### **3.2 ACTIVITY STAGES**

The successful bidder's activity shall be set out in four stages:

#### **STAGE 1 PREPARATION OF THE PRODUCT/SERVICE DOCUMENTATION**

The Successful Bidder shall prepare the technical means and personnel required to supply the Product/Service in accordance with the declarations submitted in its own tender documentation. During this stage, the Project Management and the Provider shall work alongside the Successful Bidder in order to ensure consistency between the intended and the actual result, as well as in order to facilitate the integration between the Product/Service and the Technology Platform. In agreement with the successful bidder, the Project Management shall prepare a Project Document containing all the details related to the development, testing and supply of the Product/Service. The Project Document shall include the same content as the Project Document prepared by the Successful Bidder, pursuant to Clause 5, however it may contain further detailed specifications and aspects.

#### **STAGE 2 PROTOTYPE DEVELOPMENT AND TESTING**

This stage shall commence within 7 days of the awarding of the tender and shall end no later than two months afterwards with a notification by the Successful Bidder announcing their willingness to perform the testing, according to a Test Plan to be agreed upon between the Successful Bidder and the Project Management no later than twenty-first days from the awarding of the tender. The testing of some functionalities considered to be less relevant or which require a more complex integration with the Technology Platform may be postponed to a new date, in agreement with the Project Management and subject to the Principal's final approval.

A maximum of 2 testing cycles may be allowed (in case the first fails to produce a fully positive outcome) prior to the roll-out referred to in Stage 3. Each testing cycle shall be conducted in no more than 5 working days. Any postponed functionalities shall be tested in line with the new approved schedule.

#### **STAGE 3 ROLL-OUT AND INTEGRATION WITH THE CROSS PLATFORM**

The Project Management shall check the correct implementation of the Product/Service, in accordance with the requirements and declarations of the successful bidder's tender documentation, by way of testing and roll-out. The roll-out shall take place prior to the distribution of the product/service through the Technology Platform.

## **STAGE 4 SERVICE WITH SELECTED USERS**

Upon completion of the roll-out, the next stage shall involve the supply of the Product/Service to selected users, where the said users shall be enabled to access the Product/Service, in accordance with the requirements and declarations of the successful bidder's Documentation in response to the tender. This stage must include the efficient monitoring of any aspects related to the performance of the Product/Service, including with a view to verifying its "light weight" (in terms of the transmission bandwidth required) and "timeliness" of its response, so as to ensure a consistently positive interaction experience. The successful bidder's support is necessary in this stage, where the number of recurring users is expected to increase gradually. This stage shall end within one calendar year of the testing.

### **3.3 CHANGES**

Should minor changes to the characteristics and users of the product/service be needed, the successful bidder undertakes to do so at no additional consideration. Conversely, any major changes to the characteristics and/or users of the Product/Service shall have to be subject to the Project Management's approval, based on the Provider's preliminary opinion, and shall be compensated at an additional consideration not in excess of 20% of the tender contract price, to be paid according to the timelines and funds available to Consorzio CROSS.

## **CLAUSE 4 ENTITIES ELIGIBLE TO SUBMIT BIDS**

The following entities are eligible to submit bids:

- VAT-registered professionals belonging to Italian or other professional associations in EU Member States;
- Individual firms that have been established and have operated for at least one year since the publication of this call for tenders;
- Technology start-ups (whether Italian or from other EU Member States) that have been established for at least a year since the publication of this call for tenders, with self-financed capital or financing provided by Institutional Investors not in excess of € 100,000.00.

No associations, consortia or other forms of joint participation shall be admitted.

No "subcontracting" is admitted.

## **CLAUSE 5 TENDER PARTICIPATION**

The Tenderer must submit to the Principal its Documentation in response to the tender, in Italian or English, in the form of an Acrobat PDF document not exceeding 5MB in size, by no later than 11:00 p.m. (CET) of the twenty-first day following the

date of publication (01/21/2014), by attaching it to an e-mail from a PEC (Certified electronic mail) address to the PEC address [call4app@pec.crossproject.eu](mailto:call4app@pec.crossproject.eu) (time of receipt of the aforesaid e-mail shall act as proof thereof). The Tenderer's PEC address shall also be its address for service and receipt of all notices relating to the tender.

The submission of more than one response document shall constitute a valid reason for exclusion from participation in the tender.

The response document must necessarily contain the following information, hereinafter referred to as "Required information":

- a. "Personal details" for the purposes of the univocal identification of the Tenderer and verification of the fulfilment of the eligibility requirements pursuant to Clause 4 (e.g. membership to an association, Chamber of Commerce registration);
- b. PEC (Certified electronic mail) address elected as the Tenderer's address for service of all notices pertaining to the tender, which shall need to be the same as the one from which the Tenderer's document in response to the tender is sent.
- c. "Curriculum Vitae" of the Tenderer's contact person in charge of the development and supply of the Product/Service;
- d. "Project Document" describing the features of the proposed Product/Service, according to the requirements laid down in Clause 2 and in the Technical Annex. It is necessary to clearly outline: the scenario for use, the functional characteristics and the non-functional characteristics. Moreover, it is necessary to specify which characteristics of the Product/Service offered bring additional benefits to the requirements stated by the Principal in this call for tenders, hereinafter referred to as the "Improving Characteristics";
- d. The "Price Offered", including the development, supply and distribution of the Product/Service until the term laid down under Clause 1, stated both at the net and gross value of any charges required by the law.

The documentation in response to the tender may also contain any other useful information to assess the Tenderer's ability to develop and supply the Product/Service.

The Tenderer undertakes vis-à-vis the Principal that all the materials used for the development of the Product/Service in each of its components and functions, as well as for the implementation and supply of the same, should the tender be awarded in their favour, are lawfully in the possession of the Tenderer and shall remain such and that they do not infringe any copyright or other third-party right. The Tenderer assumes the fullest and most extensive civil and criminal liability with regard to the content, lawfulness, nature, quality and truthfulness of the same information, with the Principal's express waiver of any liability and obligation verification and/or control in this regard. Therefore, any liability on the part of the

Principal in the event of the Tenderer's unauthorised use of material and information is expressly excluded.

During the period between the publication of this call for tenders and, at the latest, the seventh working day (01/10/2014), the Tenderer may submit queries aimed at eliminating any ambiguities contained in this call for tenders and in its technical annex by sending an e-mail from its PEC address to the PEC address [call4app@pec.crossproject.eu](mailto:call4app@pec.crossproject.eu). The Project Management reserves to respond, at the latest, on the 01/14/2014 solely to the queries deemed to be grounded and shall publish the answer at <http://www.crossproject.eu/> to the benefit of all potential Tenderers.

The Principal reserves the right to extend the deadline for submission of the bids prior to the expiry term referred to in the previous paragraph 1, with a notice to be published in the same manner as the current call for tenders.

## **CLAUSE 6 EVALUATION OF THE TENDER RESPONSE DOCUMENT**

The documentation in response to the tender received by the Principal shall be considered eligible for the evaluation stage if all the following conditions are met:

- the Tenderer satisfies the requirements referred to in Clause 4;
- the documentation in response to the tender has been received within the time frame and in the manner referred to in Clause 5;
- the document in response to the tender contains all the Required Information, pursuant to Clause 5.

An Evaluation Committee set up by the Principal for the purpose shall assign a score to all the documentations in response to the tender admitted to the Evaluation stage, thereby examining and assessing the three criteria identified hereunder and finally compounding a cumulative score:

*a. Functional and non-functional characteristics of the Product/Service offered:  
maximum score 70*

- I Completeness, Compliance and descriptive quality of the scenario for the use of the proposed Product/Service. The above factors shall be evaluated in relation to the users' requirements with respect to the Product/Service as outlined in the Project Document. Maximum score 15
- II Completeness, Compliance and Quality of the functional characteristics proposed for the development of the Product/Service (without considering the Improving characteristics). The above factors shall be evaluated in relation to the scenario for the use of the proposed Product/Service. Maximum score 20.
- III Completeness, Compliance and Quality of the non-functional characteristics proposed for the development of the Product/Service. The said factors shall



be evaluated in relation to the scenario for the use of the proposed Product/Service. Maximum score 15.

- IV Completeness, Quality and Scalability of the entire Product/Service structure proposed, in functional and non-functional terms and with reference to its integration into the technology Platform, so as to ensure that the users' requirements with respect to the Product/Service not contemplated by the tender shall be met in the future. Maximum score 20.

*b. Improving characteristics of the Product/Service offered: maximum score 30*

- I Thoroughness, Compliance and Quality of the Product/Service Improving Characteristics. The above factors shall be evaluated in relation to the scenario for the use of the proposed Product/Service. Maximum score 15.
- II Complementarity of the Product/Service Improving characteristics with functional characteristics proposed for the development of the Product/Service (without considering the Improving Characteristics). The above factors shall be evaluated with reference to the scenario for the use of the proposed Product/Service. Maximum score 15.

*c. Financial proposal: maximum score 30, weighted in order to foster participation in the tender by professionals/start-ups from non-homogeneous job markets*

- I The maximum score ( $P_{max}=30$ ) is assigned to the bid with the highest percentage discount in respect of the contract value indicated in art. 1.2 ( $R_{max}$ ).
- II The score assigned to each individual Tenderer ( $P_i$ ) is determined depending on the discount offered by the said Tenderer ( $R_i$ ), in line with the formula:  **$P_i = P_{max} \times R_i / R_{max}$** .
- III Financial proposals higher than the contract value indicated in art. 1.2 will be excluded from the tender.

The cumulative score will be calculated in line with the formula: Score \_criterion a + Score \_criterion \_b + Score \_criterion c.

The score to the individual items shall be assigned, according to criteria a and b, at the sole discretion of the Evaluation Committee.

For the purposes of exclusion from the tender, the Committee may assess the congruence of financial proposals that appear abnormally low in proportion to the features of the Product/Service offered.

The Evaluation Committee shall draw up an internal ranking of Tenderers that will not be made public.

## **CLAUSE 7 TENDER AWARDING**

The contract shall be awarded by the Principal to the Tenderer who has obtained the highest cumulative score and the best evaluation in terms of suitability of the price offered, following the outcome of the Evaluation Committee's works. The Tenderer ranked first shall be notified of the awarding with an e-mail sent from the PEC address [call4app@pec.crossproject.eu](mailto:call4app@pec.crossproject.eu) including the appointment in attachment, which shall require acceptance within 3 working days by sending a response e-mail from the PEC address to the PEC address [call4app@pec.crossproject.eu](mailto:call4app@pec.crossproject.eu). In case of acceptance of the appointment, the awarding shall be deemed to have been completed and the Tenderer shall be considered the Successful Bidder for all intents and purposes.

The contract awarding procedure shall also proceed in the event that only one documentation in response to the tender is submitted. In the event of waiver by a Tenderer following the awarding notice, the Principal shall send an awarding notice to the next highest ranking Tenderer.

In any event, the Principal reserves the right not to award the tender if the cumulative score of the tender documents evaluated is below 78/130.

Immediately after acceptance of the appointment by the Successful Bidder, the same shall be asked to meet with Project Management and the first of the four stages of the development and supply of the Product/Service referred to in Clause 3 shall be deemed to have been initiated.

## **CLAUSE 8 INTELLECTUAL PROPERTY OF THE PRODUCT/SERVICE**

The Product/Service, as technical concept and outcome, remains the Successful Bidder's exclusive intellectual property. The Successful Bidder undertakes to allow the product/service to be used with one's own means for the entire duration of the CROSS European project.

It shall be Consorzio Cross's responsibility to request that the functions thereof are resident and operating on a server specified by the Principal and that the Product/Service remains accessible by users for the entire duration of the CROSS European project.

Nonetheless, the Principal shall be entitled to distribute the high-level and performance functions of the Service both at the national and European level, however undertaking, in its official communications or presentations related to the Service, not to make any mention of the winner and not to disclose the technology specifications learned during Stage 1.

## **CLAUSE 9 CONFIDENTIALITY CLAUSES**

The successful bidder undertakes to treat with the strictest confidentiality any information acquired through the exchange of documentation, e-mails and/or conversations with the Principal and/or the CROSS Project partners and/or Project Management and/or its individual members.

The Principal and the Project Partners undertake to treat with the strictest confidentiality the technological and implementation aspects of the Product/Service learned during the performance of the activity.

The Successful Bidder also undertakes to protect the personal details of the citizens and/or of the organisations involved in the Product/Service processes, pursuant to the Privacy protection laws in force, the regulations of the Entities involved, and any further restrictions that the Project Management shall deem it appropriate to apply.

These clauses shall be finalised in a separate confidentiality agreement.

## **CLAUSE 10 INVESTIGATIONS AND CONTROLS ON THE ACTIVITY**

The Principal reserves the fullest and most extensive right to control and inspect, at any time and with any means, the activity carried out by the Provider of the Product/Service. To facilitate said inspection, the Successful Bidder is required to provide, in a timely fashion and upon request of the Project Management, all the information required to verify the proper fulfilment of the Product/Service.

## **CLAUSE 11 PENALTY CLAUSE**

Should the Product/Service fail to operate correctly, and, in any event, for each single day of initial delay in the implementation or in the event of failure to supply the Product/Service, the Provider shall be required to pay a penalty to the Principal (pursuant to the combined provisions of Articles 1382 and 1383 of the Italian Civil Code) amounting to €200.00 (two hundred/00) for each day of delay, failed supply or malfunctioning of the Product/Service, without prejudice to any rights to claim compensation for any further losses suffered by the Principal and to the right to apply the express termination clause referred to under Clause 13.

The sum due by way of penalty is immediately payable by the Principal, including for the purposes of Article 1219, paragraph 2, no. 3) of the Italian Civil Code.

In the event of non-compliance by the Provider resulting in the termination of the contract pursuant to Clause 13, the Provider shall pay a penalty to the Principal (pursuant to Article 1382 of the Italian Civil Code) up until the tender awarding amount (to be brought into line with the previous clause), without prejudice to any rights to claim compensation for any further losses suffered by the Principal.

Said sum shall be payable by the Principal immediately, including for the purposes of Article 1219, paragraph 2, no. 3) of the Italian Civil Code.

The Principal may offset, at any time, any accrued credits deriving from the application of the aforesaid penalties against the amounts due to the Contractor by way of fee.

#### **CLAUSE 12 TERMINATION CLAUSE**

Should the Product/Service fail to operate correctly, the Principal is entitled to set a term by which the Provider shall restore its correct operation. Failure to comply with the said term for the restoration of the Product/Service shall constitute non-compliance subject to legal termination of the contract in the manner and pursuant to the effects referred to in Articles 1454 and 1456.

For the other causes of contract termination, reference is made to the provisions of the Italian Civil Code.

#### **ART. 13 FEE AND PAYMENT TERMS:**

The fee agreed upon in the contract shall be paid as follows:

- a) 20% of the total amount agreed upon shall be paid by the Principal within 30 calendar days following the positive outcome of the verification pursuant to Clause 3;
- b) the remaining 80% of the total amount agreed upon shall be paid in 6 instalments of equal amount, to be paid on a two-monthly basis as from the date of actual commencement of the supply of the Product/Service to users pursuant to Clause 3.1 Stage 4;
- c) any additional fee pursuant to Clause 3.2 shall be paid subject to the terms and in a manner to be agreed based on the timelines and funds available to Consorzio CROSS.

#### **CLAUSE 14 SURETY AND THIRD-PARTY LIABILITY INSURANCE POLICY**

The instalment payments do not require the provision of any sureties by the successful bidder.

#### **CLAUSE 15 CONTRACTUAL EXPENSES AND CHARGES**

All expenses related to the contract shall be borne by the successful bidder.

## **CLAUSE 16 GENERAL REGULATIONS**

For anything not expressly specified in these specifications, reference is made to the regulations laid down in the Italian Civil Code.

## **CLAUSE 17 DISPUTES, JURISDICTION AND APPLICABLE LAW**

The only Court having jurisdiction to decide any dispute, arising or deriving from the interpretation and fulfilment of the contract, including the stage prior to its stipulation, shall be that of Rome.

The jurisdiction shall be the ordinary civil Italian jurisdiction.

The applicable law is the Italian Law.

## **CLAUSE 18 NATURE OF THIS DOCUMENT AND SUPPLEMENTARY INFORMATION ON ITS DISCLOSURE**

This document does not constitute in any way an offer to the public pursuant to Article 1336 of the Italian Civil Code.

This document, its technical annex and the results of the selection procedure shall be disclosed by publication on <http://www.crossproject.eu>. Informative news shall be disclosed on all the institutional sites of the entities participating in the CROSS project, without prejudice to the Principal's right to use additional forms of dissemination and dispatch to the entities (as described in Clause 4) selected on the basis of their renowned expertise and technical-professional skills potentially capable of formulating their bids.

## **CLAUSE 19 PERSONAL DATA PROCESSING**

Pursuant to Legislative decree no. 196/2003 the Principal, being in charge of the data provided in response to this Notice, informs that such data shall be used for the purposes of this procedure and shall be handled electronically and manually and, in any event, in such a way as to ensure their security and confidentiality. The Tenderers and the Successful Bidder shall be entitled to the rights pursuant to Section 7 of the aforesaid legislative decree 196/2003 in relation to the processing of any data that may concern them.



## Technical Annex for APP4CROSS Call

CROSS (Citizen Reinforcing Open Smart Synergies) is an EU funded project (CIP no. 125141) focused on nurturing an innovation ecosystem that gives rise to new digital services and applications making use of information generated by the users in the smart city environment. [www.crossproject.eu](http://www.crossproject.eu)

CROSS recognizes unexploited opportunities for services and applications in the field of non-monetary economy, an emerging sector of the digital single market with the potential for a sustainable, inclusive and smart growth. Sample activity areas that are considered by CROSS for piloting are: 1. Mutual service communities for assistance to elderly people; 2. Communities for social inclusion of immigrants; 3. Learning communities for support to school dropouts and low culture people; 4. Communities of volunteers assisting persons with disabilities. The choice is motivated by the priorities set up in the Europe 2020 Flagship “European platform against poverty” and the respective 1st Annual Convention (Polish Presidency and the European Commission, 12 December 2011).

The challenge for CROSS is to facilitate innovation in an ecosystem that involves a number of stakeholder’s active in non-monetary economy, such as: public authorities, citizens, urban communities, public service providers, service and application developers. The ecosystem will rely on common service platform and standards, which are specific for handling non-monetary transactions.

To reach this goal, the CROSS Project needs to provide citizens with a mobile APP to access services exposed by the CROSS Platform (delivered by Poste Italiane), based on specific User Roles (Citizen, Volunteer, Service Provider, Public Service Manager), in order to manage non-monetary transactions, to carry information from the user side about activities performed, and to enable public institutions to monitor the non-monetary economy.

### *The platform*

The CROSS Platform is based on two major functional blocks:

- a. Cross Delivery Platform (CDP) – is responsible of the Web Services acting as SOAP (Simple Object Access Protocol) interface for external client Web Applications and as REST (Representational State Transfer) interface for external client Mobile APPs.
- b. Wallet Management Platform (WMP) - internal components which manage all the transactional functions and data.

CDP will expose to the mobile APP specific Web Services, subset of which is:

1. User Authorization and Authentication (based on profiles);
2. Discovery of Services, available for reservation on the basis of service code;
3. Reservation of Credit for a service instance;
4. Payment after service delivery;
5. Personal Wallet data retrieval;



6. Notification for utilized services;
7. Rough statistics on Services and Volunteers (for Service Providers);
8. Wallet's Data reconciliation in case of unsettled transactions;
9. Peer-to-peer transactions support: Donation and Exchange of Credits

The Web Application Description Language (WADL) Modules and the Web Service Definition Language (WSDL) Modules for the Web Services will be shared with the APP Developer after the Call expires.

### USERS AND SERVICES PROVISIONING

Types of users managed in the platform are: Citizen, Volunteer, Professional, Service Provider Manager, Public Service Manager. The Professional and Volunteer are people directly involved in producing the social caring services; Service Provider is an organization that can involve professionals and volunteers.

Data on users and services will be uploaded from Public Service Managers and Service Providers during the Service Setup Phase of the CROSS platform. Data will completely describe Actors, Services, Roles and Rules of the stakeholders, to be applied during their interaction within the CROSS Platform.

### JUST A SIMPLE USAGE SCENARIO

Giuseppe, an elderly citizen, receives vouchers from the Social Service Office of Roma Municipio1 (SS1) for home caring. He also receives specific credentials (in form of USER\_ID and PASSWORD) to access the Platform through a Mobile APP he can run on the smartphone provided by his son.

The APP allows Giuseppe to book a home care service, selecting a community of volunteers specialized in social caring (VA). Giuseppe will address VA to schedule the service, VA notifies him that the service will be provided by Antonia (member of VA). As soon as the service is provided, Antonia retires a voucher through the app on her smartphone, and transfers it to the VA's wallet, while simultaneously SS1 is informed that the credit has been used.

Managers, Volunteers and Professionals will be provided of specific interface for monitoring the service status and delivery process.

### TYPE OF CREDITS

Two type of credits will be managed by the CROSS Platform:

- Token, as the number of available instances for a single service (or for a set of "common" services),
- Voucher, as a structured descriptor for an instance of a specific service.

Credits of both types can be stored in the electronic wallet associated to each user, identified via a WALLET\_CODE. Services have their own clearing profile.

### SOME WALLET'S FEATURES

- a) Each User involved in the CROSS platform has at least an own wallet, identified via a WALLET\_CODE;
- b) Each User can view the wallet content;
- c) Each Citizen can reserve a service in case he has a corresponding available credit. The platform will check the availability and forward the booking request to the intended service provider.
- d) Each user can transfer credits from a wallet to another according to the respective service profiles

### FUNCTIONAL REQUIREMENTS FOR THE APP

1. The Citizen (with the support of the APP) should retrieve all the details for the service he booked;
2. The Citizen should be involved in a peer to peer transaction with the Volunteer (with the support of the APP) whenever he consumes a service;
3. The Volunteer/Professional (with the support of the APP) should have access to all the information about the services he has to deliver;
4. The Volunteer/Professional should be involved in a peer to peer transaction with the Citizen (with the support of the APP) whenever he provides a service;
5. The Service Provider Manager and Public Service Manager “involved” in the Service provisioning should be able to access the CROSS Platform and collect aggregate data on service booked or delivered;
6. The APP should provide a realistic and trustworthy approach to exchange Credits between wallets;
7. The APP could provide other functionalities related to the transactional viewpoint applied to non-monetary scenarios.

### EXAMPLES OF DATA MODEL

- A PUBLIC SERVICE MANAGER will be described, for example, through these fields: PSM\_ID, Description, Contact, Address, Email, Mobile\_Number, Phone\_Number, Fax\_Number;
- A CITIZEN will be described, for example, through these fields: USER\_ID, Surname, Name, Mobile\_Number;
- A SERVICE will be described, for example, through these fields: SERVICE\_ID, Expiration\_Date, Description, Compensation\_Method (token or voucher), Token\_Needed, Specific\_Code\_Op\_for\_Services;



- A TOKEN will be a simple counter of a specific service instance managed by WMP process and functions;
- A VOUCHER will be described, for example through these fields: Voucher\_ID, User\_ID, Service\_ID, Description.

More details will be made available to the APP Developer after the Call expires.

#### OTHER REQUIREMENTS

- The APP has to be provided for (if a native application) or has to be fully compatible with (if a Mobile Web APP) the more popular Mobile Operating Systems/Platforms (Android, iOS, Windows Phone).
- The list of specific hardware and software requirements compatible with the APP have to be declared: e.g. supported smartphones models and platforms (OS version, Memory available, Processor type/speed,..)
- The APP has to be optimized to work in a mobile network context (and not only on Wi-Fi areas).
- APP User Interface (UI) has to take care of accessibility and usability issues.
- APP has to support user action and personalization for Default Languages (Italian and English), and different aspect ratio (Portrait and Landscape Mode).
- APP Lifecycle has to be managed through an “Easy to Update” mechanism (to be integrated with the planned CROSS Project APP store).

#### ADDITIONAL FEATURES

Based on specific and more complex scenario proposed by the applicant, a wider set of functions can be provided by the APP. It is up to the applicant to propose new features that enrich the non-monetary services and improve the quality of the user interaction with the CROSS Platform. The APP is also encouraged to use its own resources and data to support these additional features.

END OF TEXT