



EXPLOITATION **PLAN**



Context

The objectives of the project Seniors Go Rural (SenGoR) include a sustainable implementation of results after the end of the project. This long-term implementation shall be based on an **Exploitation Plan** <3.2.4.7>, especially for the results

3.2.2.1 Guidelines and Accreditation

3.2.2.2 Operative Systems

3.2.4.1 Website / Web Platform

plus any other results that may be generated by the project and offer potential for exploitation

The present document covers this task

Overall Property and Exploitation Rights

Results of the project as whole initially belong to all partners of the consortium, unless otherwise stated in the project or decided differently at project meetings. Such property comes together with exploitation rights and obligations.

This matter was discussed at the 4th project meeting in Florence, with the following results:

- Both partners representing seniors (Ouderenfonds NL) and destination (Vlams-Brabant) renounced voluntarily to be involved in the future management and exploitation of the three results. However, they maintain the rights to use the experience and apply the Guidelines for their own use.
- Rural Tourism associations (HANEN, Lauku Celotajs, and LKTA) equally expressed their interest to use the results for their own work. However, as all of them are member of EuroGites – European Federation of Rural Tourism, they agreed that this organisation shall assume the sole property rights of the project results.
- In view of the ongoing cooperation and possible common action to be defined between several of other parallel Senior Tourism projects, the legal protection of results, especially of the “Silver Suitcase” logo as visual mark, was suggested.
- The involvement of AGE Platform in exploitation, as initially planned in the project, is postponed for the same reason of joining common criteria. AGE Platform would be again included there as possible direct partner.

This decision was accepted by the EuroGites Executive Committee on 5th-February. It leaves EuroGites as a sole owner of intellectual property rights for exploitation and management of the results also with third party, while project partner can use them exclusively for their own needs.

1) Guidelines and Accreditation

The Guidelines for Senior Friendly Rural Tourism Products in Low Season are one of the deliverables and formally approved by the consortium as common result of the project.

As indicated in the first chapter on property rights, all partners renounced on their property rights in favour of concentrating this right on P2-EuroGites.

EuroGites is as per now in a strategic discussion process about activities and actions in the horizon 2025. This includes the extent of exploitation of intellectual property in the future, including the results of SenGoR, under commercial aspects. The discussion is ongoing, and requires a vote by the General Assembly which will take place in June 2016. Therefore no final decisions are possible before that date. However, the following two options are proposed in an internal document:

- Apply the guidelines as a “strong recommendation” for members, without a legal or formal process of accreditation.
- Develop a formal accreditation process, either within EuroGites or integrating the guidelines with similar concepts; in the second case, the result could be a new or revised content. *See next point regarding “collective mark”*

2) “Silver Suitcase” logo



The “Silver Suitcase” logo was created as a visual symbol for both the guidelines and the operative system of a Guest Card. A first version with text in a single line was used during testing, and in part of the dissemination materials. However, practical experience with this design at small sizes lead to a revised final version with bigger letters in two lines, presented and formally approved at the 4th project meeting.

Due to the great interest that the “Silver Suitcase” term and logo generated at all public presentations, it was decided to register it at the **OHIM – Office for the Harmonization in the Internal Market** as part of the legal advice already foreseen in the project application. This registration only is for “Figurative mark with letters” to assure protection against copy or use by third party.

A registration as collective mark would be necessary for commercial exploitation such as certification or cession of use to other entities. This was not considered convenient at this moment: depending on the ongoing conversations and discussions about a common umbrella for several similar initiatives, legal advice cost that would be obligatory now for a collective mark might be useless.

3) Operative System – guest card

The rules of the **Guest Card** are part of the abovementioned Guidelines. Implementation during the project testing was not successful due to several aspects that are reflected in the Testing Report. However the concept was implemented outside the project with great success at national level in at least one of the partner countries. Furthermore, while the “Silver Suitcase” logo is protected as trademark, this does not include the rules for the Guest Card as set up in the two Framework Agreements which can be applied under any other different symbol.

For future exploitation of the by EuroGites as owner of the intellectual property, the same situation as outlined for the exploitation of Guidelines applies. Three alternatives are proposed internally, pending decision and approval:

- No formally structured exploitation of the guest card under the Silver Suitcase label. In this case, the two existing Framework Agreements remain as a recommendation and technical tool that can be freely modified and adapted. Periodical revision and updates of rules are possible.
- Formalized exploitation of the Guest Card using the Silver Suitcase trademark, but limited to EuroGites as owner. In this case, internal rules for the use of this logo by EuroGites members need to be established as a minimum.
- Formal exploitation under the Silver Suitcase trademark also with third-party entities. Transformation into a collective mark with registration of the respective rules at OHIM is obligatory for adequate legal protection.

4) Website

The website for presentation of rural tourism off-season products that are specially adapted and accredited for senior visitors under the "Silver Suitcase" system is established as sub-domain within the EuroGites website at <http://sengor.eurogites.org>. The website and its programming code belong exclusively to EuroGites. Full control by EuroGites is assured, there is no need to define rules for the use of this site by third party after the end of the project.

The website, while extremely flexible and powerful, is more complex to be managed than had been expected. At current situation, it can be maintained with own existing funds of EuroGites as-is, covering the cost of hosting and basic web administration. Any content adding or edition requires trained staff at least part time, assignation of additional funds for this is critical. Two options are realistic:

- Free use - generation and update of content is open for all members that want to make use of the site. No web or content management service is provided. Only technically maintenance is taken care of by EuroGites.
- Moderated content by a part-time dedicated webmaster that is familiar with the site management. New content feed is charged at a minimum flat rate, plus additional per-hour rates depending on the specific case and complexity.

Even in the first case, considerable initial training efforts are needed for future users, and a webmaster familiar with the site must be available on demand for solving any kind of technical incidence or problems. Both options can also be combined, e.g. with free use for trained editors, and optional content mastering service for those that are not able or willing to administer content themselves.

The need to provide a reliable just-in-time service to members or other users at any moment, suggests outsourcing the exploitation to interested third-party, if any. This will allow EuroGites to count with a fixed and calculable cost of maintaining the service for its members; in the case of commercial success, it could generate additional income through royalties shared commissions.

Furthermore, EuroGites is prepared to make this site and its technical capacities available to other entities that may join the initiative, or within a future agreement of joint actions with third party. This was publicly proposed and communicated at the joint meeting of the four Senior Tourism projects in Florence on Thursday 4th-February. Uptake and further development of this idea will be possible to define only after the end of SenGoR and other similar projects.

COMPARATIVE CHART OF EXPLOITATION OPTIONS

No.	Option	Cost	Coverage of cost
Guidelines and Accreditation			
1.1	Once-only recommendation document	0	Does not proceed
1.2	Recommendation document with periodical update	1000 €/ update	From regular budget
1.3	Accreditation – only internal within EuroGites	2000 € set-up Audit fee - tbd	From regular budget From the audited service
1.4	Accreditation at wider scope, ie. through a network of senior tourism initiatives	4000 € set-up Audit fees - tbd	Shared amongst orgs From audited service
Silver Suitcase logo and trademark			
2.1	No exploitation – free use by members	900 € (after first 10 years)	From regular budget
2.2	Use for labelling after accreditation that is arranged directly by EuroGites	Included in above <1.3>	As above <1.3>
2.3	Internal use by EuroGites members for labelling after accreditation	Set-up 3000 € Then as <1.3>	As above <1.3>
2.4	Use as Collective Trademark	Set-up 6000 € Royalties Audit fees and similar	Special budget required From using entities From audited service
Operative System / Guest Card framework agreements			
3.1	Once-only recommendation (with optional updates of conditions)	0 1000 €/ update	From regular budget
3.2	Exploitation in combination with logo – only by EuroGites	Included in <2.3> Production of cards	Setup from regular budget Cards at 1 EUR/item
3.2b	Extended exploitation including statistics, evaluation, etc.	As previous Overhead for services	As previous + Percentage on turnover
3.3	Exploitation in combination with logo – collective system and trademark	Set-up included <2.4> Variable service cost	As previous
Website			
4.1	Free use of system as-is + <i>Optional improvements</i>	1200 € p.a. hosting etc <i>Specific budget</i>	From regular budget <i>On special decision</i>
4.2	Fully moderated and administered content	1200 € p.a hosting 3600 € p.a. webmaster	From regular budget Fees for upload of content
4.2b	Mixture of <4.1> and <4.2>	As <4.1> plus minimum 1800 € webmaster plus Upload charge if used	Regular budget Flat rate per upload Fee per upload
4.3	<i>Commercial use (extension to online booking facilities) – own system, or transparent external service</i>	<i>As previous <4.2></i> <i>Booking engine cost</i> <i>Commission for use of external system</i>	<i>As <4.2b></i> <i>Installation cost and/or use of booking engine covered by generated revenue (commission on bookings)</i>