

## Project Specification Template

### Tender details – the opportunity

Company name	Pathway Consulting Group Limited
Company address	35 High Street, Kelvedon, CO5 9AG
Description of company activity/SIC code	<p>Consulting and interim management provider focussing on sourcing, procurement, asset and supply chain management</p> <p>SIC code: M 70229 (<a href="https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/455263/SIC_codes_V2.pdf">https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/455263/SIC_codes_V2.pdf</a>)</p>
Objective of the proposed innovation project– this MUST involve activity that results in the development of or introduction to the market of a new product or service (max 300 words)	<p>To develop and launch a new innovation (subject to patent prior art search and commercial due diligence) through the development pipeline to scalable manufacture and export where necessary.</p> <p>Further specific details in relation to the invention itself including drawings will be made available to successful bidders on despatch and receipt of a signed Non-Disclosure Agreement. At this stage bids will be assessed against the criteria as they are currently defined (ie 8 questions). Shortlisted bidders at this stage will then be sent an NDA and invited to complete and return same. On receipt of the NDA, further details will then be released to those shortlisted bidders. They will then have a further period to refresh their initial responses. A subsequent down-selection will then take place in an effort to find a suitable collaboration partner to conduct more detailed discussions with a view to closure.</p>
Company’s current situation –existing project team and innovation project development stage (max 400 words)	<p>Pathway Consulting Group Limited was incorporated in November 2015 as CB Supply Chain Services Limited - a sole Director company to bring a fresh approach to the procurement, supply chain and asset management advisory market - a subset of one worth up to \$300bn (top-consultant.com). The company is currently cash-positive following services delivered in consulting and interim management and seeks to continue and grow as a going concern in this line of business.</p> <p>In January 2017, a patent application was filed with the IPO in relation to a new product for the global tourism industry (in which UNWTO estimates to be 1.2bn tourists/year, \$900bn spend) representing a branching out to a complementary revenue stream of significant potential. The particular area of interest for this project is the cruise ship and luxury resort areas of this market.</p> <p>Initial expressions of support for the invention to which the patent application relates has been received from the Essex Innovation Program and a pitch deck has also been forwarded to an industry leading commercial business incubator and accelerator in order to</p>

	<p>gauge marketplace interest in collaborating. Anecdotal market testing suggests a favourable reception to the invention itself; however in the absence to date of a fully working prototype, no substantial pitching has yet taken place in front of potential commercial customers, nor have any (pre-) orders yet been taken. Market analysis has been conducted and target customer organisations identified, pending engagement with discrete individuals in those organisations.</p> <p>It is thought that with the invention targeted towards positively disrupting the on-board and in-resort customer experience, once early adopters have bought into the invention others will quickly follow suit in order so as not to be at a competitive disadvantage.</p> <p>The invention itself comprises elements in the following categories of science:</p> <ul style="list-style-type: none"> <li>• Electromechanical engineering</li> <li>• Software engineering including app and web development and deployment and licensing compliance and enforcement</li> <li>• Network connectivity</li> </ul>
<p>Business need – what expertise and support is required from a Knowledge Base to reach the objective(s) above? (max 400 words)</p>	<p>Expertise is required and bids will be assessed against the following criteria:</p> <ol style="list-style-type: none"> <li>1) Gathering of technical requirements and configurable business rules in order to produce the functional specification for the system at the centre of the invention: What methodology is used in doing this ? What happens in the case whereby more than one academic department is involved in creating and selling-in the overall business solution, including the end-customer pitch ? Please give examples of past successes, taking into account the key area of interest of the project</li> <li>2) Construction of a prototype that both encapsulates the functional requirements initially identified whilst also allowing some flexibility based on configurable business rules: What technology is best suited to this business use and why ? What network connectivity and software engineering capabilities can you offer and are these able to be deployed on any smartphone app store and via popular web browser ? What role-based and license enforcement applications have you developed ? What data hosting capabilities can you offer and how do you work with both the SME and adopting client(s) in maintaining and developing the software application associated with an invention, especially around developments in functionality and solution upgrades as well as the regulatory aspects of data control ?</li> </ol>

	<p>3) Facilitation of showcasing of the prototype to representatives identified in the target market: What business relationships do you have with the target market ? How have you worked with them in the past ? What are your plans for the future ? How would you overcome the geographic challenges of target customers being in different locations to the prototype and/or SME and/or Knowledge Base partner ?</p> <p>4) Scalable manufacturing, packaging, supply chain management and distribution/export: What relationships do you have with scalable manufacturing and supply chain partners that might be relevant to this project and why ? Where has this worked for you in the past and what would you do differently this time ? Where have you supported similar projects in the past and how do you control the hand-over points between prototype and full scale manufacture ? Who retains ownership of the prototype and any IP generated from the project as opposed to IP brought to the project ?</p> <p>5) Project planning and business continuity: How do you allocate and manage project work once commissioned and what disaster recovery protocols are in place to protect both the team on the project as well as outputs from the team ie prototypes, operating instructions etc such that the initial project plan can be adhered to in the event of incapacity of any element of the project including staff and prototype ? What guarantees are available ? How do you manage the risk of cost-overrun ?</p> <p>6) Funding and venture capital: Do you have any relationships with potential investors who may be interested in partnering in such an invention ?</p>
<p>Required timescales (if any) for Project Start and duration, and if applicable anticipated product launch date</p>	<p>7) How soon can a working prototype be produced for commercial demonstration ? What needs to happen procedurally in order to produce a working prototype and how do you like to communicate with the SME when collaborating on projects of this nature ? What has worked for you in the past and what would you like to see different this time ? How do you assess fit between your organisation and the SME ?</p>
<p>Optional - company</p>	<p>8) Please give a budgetary indication for aspects of this project,</p>

<p>budget available to match fund KEEP+ grant (if known) please see 'Further details' for maximum funding amounts</p>	<p>punctuated by its key milestones, using examples/case studies as necessary. Please state your assumptions and separate time-based costs and materials-based costs. This should help assemble the bill of materials for use in pricing, manufacturing and warehousing and distribution discussions.</p> <p>Thank you for your interest to date and in advance for your response.</p>
<p>Company Contact for further information</p>	<p>Colin Bidewell (colin@pathwayconsultinggroup.com)</p>
<p>Required tender response date (min 20 working days from posting of advert)</p>	<p>21<sup>st</sup> April 2017</p>
<p>Responses are sought from organisations classified as Knowledge Bases, defined under the ERDF Definition of the Knowledge Base: Higher Education, Further Education and Research Entities which are: UK Public Sector Research Establishments, Research and Development Organisations, Research and Technology Organisations.</p> <p>The Company is seeking a Knowledge Base partner to work with them to develop a project which, dependent on a successful Grant Application, will be supported by the KEEP+ ERDF project using one of the three types of intervention described below. Please also see KEEP+ website – link.</p> <p>The Company would like to work with a Knowledge Base partner under a two stage contract.</p> <p>In Stage 1 they need the expertise of a Knowledge Base partner to develop and design the project which will deliver the solution for their business need and support their grant application to KEEP+. The Company have already secured a Grant from KEEP+ of up to £1k to fund 50% of the cost of this activity, subject to them procuring a suitable KB partner.</p> <p>In Stage 2, if the grant application to KEEP+ is successful, the Company requires the expertise of the Knowledge Base partner, to work with them to deliver the solution i.e. the project intervention supported by the KEEP+ grant.</p>	
<p>Criteria for Decision making</p>	<p>Assessment criteria are as follows</p> <ul style="list-style-type: none"> <li>• Expertise fit</li> <li>• Timing fit</li> <li>• Suitability of proposed methodology</li> </ul> <p>Weighting is determined by the SME partner</p>
<p>Date for Contract Decision</p>	<p>Minimum of 20 working days from date of advertisement</p>
<p>Tender response templates</p>	<p>Please approach the company for the exact format of your response.</p>

### Further details for potential respondents

You are responding to a tender for an activity which is eligible for part funding by the European Regional Development Fund, specifically under the KEEP+ Programme.



The KEEP+ Programme aims to support SMEs to develop new products and services by fostering long term collaborative relationships between Knowledge Bases – Universities and research institutions – and SMEs who need expertise and support for innovation.

Please see KEEP+ website for further information [www.KEEPplus.co.uk](http://www.KEEPplus.co.uk) or contact the KEEP+ project team 0845 196 4310 [carole.randall@anglia.ac.uk](mailto:carole.randall@anglia.ac.uk) or 0845 196 4207 [cheryl.cook@anglia.ac.uk](mailto:cheryl.cook@anglia.ac.uk)

KEEP+ provides maximum allowable grants for its specific types of intervention. Those intervention types and maximum grant levels are as follows;

- Innovation Internship (max 12 week duration) – this intervention involves a graduate intern working on a relatively short term activity, they are based within the beneficiary company - grant allowance 50% of eligible costs to a maximum of £2,828.00 (please note, NO stage 1 grant).
- KEEP Knowledge Exchange Embed Partnership (12 month duration) - this intervention involves a graduate working on a mid- to long-term activity with the support of a specific academic staff member, the graduate is based within the beneficiary company - grant allowance 50% of eligible costs to a maximum of £30,275.00 revenue (including maximum Stage 1 grant) and £6,000 capital.
- KEEP Research and Innovation Collaboration (no fixed duration) this intervention involves an academic colleague working on a short- to long-term activity, they are based at the Knowledge Base but with regular face-to-face interaction with the beneficiary company - grant allowance 50% of eligible costs – these grants have an average cost of £19,250.00 revenue (but may range from £5,000-40,000, including maximum Stage 1 grant) plus a strict maximum of £6,000 capital.
- Capital grants are only available for the KEEP or Research and Innovation Collaboration projects, not Innovation Internships and any capital items must be procured separately.

The following is a guide to the types of cost that you should expect to occur should your application be successful;

- Innovation Internship (max 12 week duration) – intern wage, administrative support
- KEEP Knowledge Exchange Embed Partnership (12 month duration) – project development, associate wage, academic wage, administrative support, training and travel (on the part of the knowledge base employees), minor equipment (please note there is a potential separate grant for major capital purchases), recruitment
- KEEP Research and Innovation Collaboration (no fixed duration) – project development, academic wage, administrative support, consumables (please note there is a potential separate grant for major capital purchases)