

**Subject: Notice of open market survey, aimed at identifying economic operators for the subsequent and possible direct awarding phase of the service, under public tender, of specialised technical assistance within the framework of the Project "EUSAIR Stakeholders Engagement Point - StEP" - Cod. 00539 - IPA ADRION Programme 2021-2027 - CUP B31F23001930007.**

#### **ART. 1: REFERENCE CONTEXT**

The Marche Region, in the 2014-2020 programming period, played the role of Italian Partner in the Project "Supporting the Governance of the EUSAIR: Facility Point", and developed an IT and information platform for Stakeholders called EUSAIR STAKEHOLDER PLATFORM (or briefly, ESP platform) - [https://espcommunity.eu/-](https://espcommunity.eu/), with the objective of providing a virtual place to facilitate communication and collaboration between all the stakeholders of the EUSAIR area countries (Italy, Slovenia, Croatia, Montenegro, Albania, Bosnia Herzegovina, Serbia, Greece, San Marino and North Macedonia).

Thus, the Marche Region provided the Adriatic Ionian Macroregion with a useful platform for the creation of a real Community. Stakeholders involved in the project activities and representatives of the institutions of the EUSAIR countries involved in the management of the funding programme subscribed to the ESP platform. This tool had a strong increase in use during the COVID-19 pandemic and, despite the restrictions on mobility, made it possible to transfer, in on-line mode, all the activities originally planned in presence.

Taking into account the gradually emerging needs, the ESP platform allowed the possibility, within a specific section, to follow on-line training courses through an asynchronous e-learning tool, developed in agreement with the stakeholders, in order to make as many people as possible aware of the issues related to EUSAIR Strategy (adoption of the EU Strategy for the Adriatic-Ionian Region by the European Council on 24 October 2014).

Through the ESP platform, it has also been possible to experiment a financial dialogue exercise called "Action Lab", which has led to the setting up of virtual working tables, in which, to date, the Managing Authorities of the European Territorial Cooperation Programmes (ETCs), which insist on the Adriatic-Ionian area of the Strategy, have participated, in order to identify complementarities and synergies among them also through the inclusion of the EUSAIR Strategy priorities (flagships) in the various calls for proposals of European funding.

Taking into account the role played by the Marche Region in the project "Supporting the Governance of the EUSAIR Facility Point", the Monitoring Committee and the Managing Authority of the Interreg IPA ADRION Programme 2021-2027 have assigned to the Marche Region the role of lead partner of the project "EUSAIR Stakeholders Engagement Point" (acronym, StEP). It is one of the three strategic projects aimed at supporting the governance of EUSAIR in the period 2023-2027. The StEP project is funded by Axis 4 of the IPA-ADRION Programme 2021-2027.

StEP project partners are: the Marche Region (lead partner), the Directorate for European Integration of the Council of Ministers of Bosnia and Herzegovina and the State Agency for Strategic Planning

and Aid Coordination of the Albanian Government. Also participating as associates are the Presidency of the Council of Ministers with its Department for Cohesion Policies (DipCoe) and the Ministry of Foreign Affairs and International Cooperation (MAECI), both of the Italian Government.

The overall objective of the StEP project is to ensure a more efficient implementation of the priorities and flagship initiatives of the EUSAIR Strategy, by updating and enhancing the ESP platform as a virtual place for data analysis and analysis, in order to accelerate the data-driven decision-making process of policy-makers and administrative directorates of the Adriatic-Ionian territories. At the same time, the enhanced ESP platform must enable the collection of new information to create further value in a sustainable way in the long term. Furthermore, the StEP project must animate and/or test new networking activities between the Managing Authorities of the ETC Programmes of the area and of the "mainstream" ones (regional and national Programmes) by foreseeing synergic actions to accompany and facilitate the coordination process in support of the investments financed with European resources. In addition to this, the analysis and opening of channels for dialogue and financial cooperation between the authorities of the area and the interested European and non-European bodies is foreseen, aimed at the definition of further and additional financing methods for projects that are particularly relevant for the implementation of the EUSAIR Strategy.

The geographical area covered by the StEP project is represented by the following territories:

- A) Croatia: 2 regions (Jadranska Hrvatska, Kontinentalna Hrvatska);
  - B) Greece: 13 regions (Anatoliki Makedonia – Thraki, Kentriki Makedonia, Dytiki Makedonia, Thessalia, Ipeiros, Ionia Nisia, Dytiki Ellada, Sterea Ellada, Peloponnisos, Attiki, Voreio Aigaio, Notio Aigaio, Kriti);
  - C) Italy: 12 regions and 2 autonomous provinces (Abruzzo, Molise, Puglia, Basilicata, Calabria, Sicilia, Provincia Autonoma di Trento, Provincia Autonoma di Bolzano/Bozen, Veneto, Friuli-Venezia Giulia, Lombardia, Emilia-Romagna, Umbria e Marche);
  - D) Slovenia: 2 regions (Vzhodna Slovenija, Zahodna Slovenija);
- Whereas, in the case of the Republic of San Marino (third country), Bosnia and Herzegovina, Albania, Montenegro, North Macedonia and Serbia (IPA countries), this refers to their entire national territory.

## **ART. 2: OBJECT**

In order to guarantee the continuity of the previous ESP platform and of the activities carried out so far in the framework of the financial dialogue with various institutions and the start-up of the StEP project activities, concurrently with the preparation and clarification activities of the above-mentioned tender procedure for the awarding of the services necessary for the design and implementation of the new StEP ICT-information platform, it is deemed appropriate to activate, as soon as possible, the assistance of no. 2 specialised experts with the following technical-professional profiles:

### **Technical profile A - Community and Content Platform Management service**

The economic operator will have to provide specialised technical assistance to support the activities of animation, revision and redefinition of the contents of the interventions in order to keep the EUSAIR Stakeholders Platform (ESP) up-to-date and animated while waiting for the awarding of the above-threshold tender procedure for the upgrade of the current ESP platform and its functionalities as foreseen in WP 1 and WP 2 of the StEP project.

The economic operator must have gained experience with public or private entities for at least 36 months, cumulative even not continuous, in the last 8 years from the date of publication of the notice

of this market research, **in activities related to the management and animation of digital infrastructures for the virtual delivery of services and products through the use of software, web applications and other Key Enabling Technologies, accessible by a large community of subjects.**

For this specialist technical support service, it is requested at least one professional with:

- proven experience with the following applications: content management (e.g. WordPress, Joomla!, or equivalent); instant polls tools (e.g. Mentimeter, Calendly, SliDo, or equivalent); visual communication tools (e.g. Canva, Desygner, Mailchimp, Infogram, or equivalent); MOOCs design tools (OpenClassroom, WeSchool, EMMA, or equivalent);
- excellent editorial and self-organizing skills;
- excellent knowledge of Italian and English, spoken and written (minimum level B2);
- excellent attitude for teamwork.

The economic operator will be required to collaborate with the ESP Digital Management Team of Regione Marche in the management and animation of the EUSAIR Stakeholder Platform (ESP) (<https://espcommunity.eu/>) through the following activities:

- the organization and moderation of thematic webinars aimed at the involvement of working groups/communities to start the implementation of the different WP of the StEP project;
  - the preparation of web communication tools and other documents in English and/or Italian for the presentation of the StEP project and the update on its implementation status;
  - the preparation of periodic reports related to the use of the ESP by different groups of stakeholders, evaluation of the results obtained in the previous programming and improvement proposals to increase navigation and use by different stakeholders;
  - the management of the repository of documents, databases and digital booklets for the implementation of EUSAIR flagships;
  - the digital mapping of funding opportunities 2021-2027 in the geographical area and within the pillars of the EUSAIR Strategy;
  - the preparation of asynchronous learning modules (MOOCs), in order to populate the Learning Channel of the ESP platform with specific courses on the functions of the StEP project (embedding, financial dialogue and involvement of stakeholders);
  - the provision of databases and digital booklets for the implementation of EUSAIR flagships;
  - the preparation of the report of funding opportunities 2021-2027 in the geographical area and within the pillars of the EUSAIR Strategy;
  - provide technical assistance to ESP (front office) stakeholders in English and Italian;
- Additional and possible support activities, similar to those listed above and consistent with the implementation of the StEP project, can be agreed, if necessary, with the regional structure.

### **Technical profile B - Technical assistance to facilitate the embedding process of the EUSAIR strategy and the development of a financial dialogue**

The economic operator shall provide technical assistance to support the process of integrating the EUSAIR strategy into the ETC and Mainstream programmes (ROP and NOP) and financial dialogue with European and non-European bodies pending the completion of the tender procedure above the threshold for the implementation of WP 4 of the StEP project.

The economic operator must have gained experience with public or private entities for at least 36 months, cumulative even not continuous, in the last 8 years from the date of publication of the notice of this market research, in matters related to **the study and analysis of data/results under the Cohesion Policy 2014-2020 and 2021-2027 and the study and analysis of data/results in the**

**framework of European Territorial Cooperation 2014-2020.**

At least one professional is required for this specialist technical support service with:

- excellent ability to analyse and evaluate priorities and flagships within the Adriatic-Ionian macro-regional strategy (EUSAIR), its Governance and the new Action Plan being approved;
- ability to study, analyse data and the results of animation activities and assess the process of integrating EUSAIR priorities/flagships at the level of ETC and other direct and mainstream programmes;
- ability to study, analyse and design the processes of dialogue and financial cooperation with European and non-European bodies (e.g. WBIF, EBRD, CEB, EWB, CDP Group, WB, etc.);
- excellent editorial and self-organizing skills;
- excellent knowledge of Italian and English, spoken and written (minimum level B2);
- excellent attitude for teamwork.

The economic operator will be required to collaborate with the StEP Management Team of Marche Region through the following activities:

- support the StEP Management Team in the organization and implementation of WP4 waiting for the completion of the tender procedure above the threshold for the implementation of the aforementioned WP;
- reactivate the monitoring and sharing of the results of the experimental exchange and collaboration between ETC embedding programs conducted in the previous programming period and analyze the next steps of implementation of EUSAIR flagships called "ACTION LAB";
- organise, and facilitate online/face-to-face events through the EUSAIR Stakeholders Platform (ESP) to share and co-create embedding solutions by working in groups and in the network in order to reactivate the ETC Managing Authorities network 2021-2027;
- collaborate in the design of paths for the establishment of the network of Adriatic-Ionian Mainstream Managing Authorities 2021-2027;
- identify, where appropriate, and involve in the aforementioned activities the experts of the ETC and mainstream Managing Authorities of the Adriatic-Ionian area, the experts of INTERACT, thematic experts and experts of the TSG (Thematic Steering Groups) of the 5 EUSAIR Pillars;
- analyse available databases to identify projects and outputs related to flagships, collect information with questionnaires, participate in meetings and workshops;
- mapping potential European and non-European financial partners (e.g. WBIF, EBRD, CEB, EWB, cdp Group, WB, etc.);
- compile reports, background/methodological papers, datacards, presentations, etc. related to the above activities in Italian and English.

Additional and possible support activities, similar to those listed above and consistent with the implementation of the StEP project, can be agreed, if necessary, with the regional structure.

This market investigation notice is intended as a pre-emptive exploration to collect any expressions of interest, in open mode, from the relevant market, which will not be binding for the Marche Region for the subsequent and possible invitation to the procedure of acquisition of one or both services, through one or two economic operators concerned.

Therefore, no right arises at the time of the mere fact of the presentation of the expression of interest. Marche Region also reserves the right not to initiate any award procedure, as well as the right to modify/supplement/revoke the market research notice at any time, without assuming any liability to the participants in this research. It should also be noted that the notice does not open any awarding

procedure.

### **ART. 3: METHOD OF EXECUTION**

The place of work is the headquarters of the Marche Region in Ancona, although it is possible to work remotely and to travel to the territories covered by the EUSAIR Strategy.

The activities will be performed on the basis of a detailed plan and a chrono-program of the working days and the expiry dates of the delivery of the papers and/or events that may be proposed, approved by the contracting authority.

### **ART. 4 ESTIMATED TOTAL VALUE OF SERVICE**

For both services listed above, a maximum amount of € 60,000.00 (excluding VAT) has been estimated, to be valid on the financial level of the StEP project, that is, € 30,000.00 for each of the profiles described above, if the Administration decides, in compliance with the prohibition on splitting the tender amount, to proceed with two separate assignments directed to two different economic operators.

The estimated maximum amount includes the cost of the service and any options for contract renewal and increase or decrease in value up to one fifth of the amount allocated. In addition, the amount specified also includes any costs for travel if necessary and expressly requested by the contracting authority.

However, the exact value that will qualify the subsequent and possible direct award procedure of the service contract, which is the subject of this act, will be determined on the basis of the estimated total cost, excluding VAT, which will emerge as a result of this market investigation.

The interested party must submit an estimate of the cost per working day, a plan of the proposed activities with the relative chronology of the working days and the mode of performance of the service.

### **ART. 5 LENGTH OF SERVICE**

The duration of the next and possible service contract is estimated for about 100 working days and in any case for a maximum period of 12 months.

The duration can be renewed, or reduced depending on the outcome of the future procurement above the threshold for the upgrade of the current ESP platform, its functionality, financial dialogue and embedding activities (WP 1, WP2 and WP4 of the project).

In the event of a shorter duration, the contractual amount will be reduced proportionately to the shortest collaboration time, except in the event that the contract holder has nevertheless secured the agreed result. In this case, the final amount will be paid in proportion to the result assured to the Administration.

### **ART. 6 REQUIREMENTS FOR THE PRESENTATION OF EXPRESSIONS OF INTEREST**

Economic operators wishing to submit their expression of interest for aforementioned services must meet the following general and technical-professional requirements:

- a) enrolment in the Register of Companies of the Chamber of Commerce where the economic operator has its registered office and, in the case of entities based in a foreign country, enrolment in the Register or in the Official List of the State to which it belongs (at the time of submitting the

expression of interest, the economic operator from another Member State, not resident in Italy, will be required to declare - pursuant to the Consolidated Text of legislative and regulatory provisions on administrative documentation, as per Presidential Decree no. 445 of 28 December 2000 - that it is enrolled in one of the professional or commercial registers relevant to the activities pertaining to the subject of this notice, as per Annex II.11 of Legislative Decree 36/2023 and to have a local unit registered in the R.E.A. - *Repertorio delle notizie economiche ed Amministrative* - with a Chamber of Commerce based in Italy. The latter condition will also be applicable to operators from non-EU countries, provided that they participate in the IPA Adrion Programme 2021-2027).

- b) as an alternative to point a), registration on a professional register and possession of a VAT number;
- c) as an alternative to points a) and b), registration with the Separate Management of the INPS for self-employed professionals without social security fund, provided they have a VAT number and for professionals registered in the register or social security fund that, simultaneously with the professional activity, they also carry out other job covered by the contribution obligations;
- d) absence of automatic and non-automatic causes of exclusion, including professional offences, referred to in Articles 94 to 98 of Legislative Decree no. 31 March 2023, 36;
- e) operate with the main ATECO code related to the services covered by this notice (code ATECO 70.2 - Management consultancy), or similar in the case of a registered professional or self-employed person registered for the separate management of the INPS;
- f) have declared a total turnover at least equal to the estimated maximum value of the contract (Euro 60,000.00, excluding VAT), achieved in the three years preceding the call for market research;
- g) it will be considered a preferential requirement to have already performed or to have performed a similar service, or, analogous to that required for the profile in which the interest is presented as indicated above and detectable by the CV of the expert attached to the expression of interest (Europass model CV of maximum 5 pages, Arial theme, character 11).

Moreover, it is specified that the possible and future direct award of the public contract for the services requested will be negotiated through the electronic trading platform GT SUAM ("Gare e Appalti") - <https://appaltisuum.regione.marche.it/PortaleAppalti/it/homepage.wp> -, whose service is free.

## ART. 7 METHOD OF PRESENTATION OF EXPRESSIONS OF INTEREST

The expression of interest, to be drawn up in accordance with the attached form and digitally signed by the legal representative of the interested economic operator, must be transmitted via the GT-SUAM portal by 1:00 pm (13:00) Of the day June 3<sup>rd</sup> 2024.

Any other method of submission will result in the non-evaluation of the submitted event.

Expressions of interest will be assessed on the basis of the following congruity elements:

1. ability to provide the requested service on the basis of each profile listed above;
2. provide the service with as many working days per profile as possible;
3. willingness to provide any additional services and improvements to meet the needs of the Administration previously described.

The adequacy assessment will also take into account the relevance of the proposed activity plan, and the consistency of the plan with the relative chronology of the working days taking into account any additional activities proposed (qualified as more services and/or improvements to the explicit requirements) over the 12-month period of contract execution.

In order to identify the economic operator to be invited to the direct award procedure, the method of drawing lots or other methods of random extraction of the name will not be used, unless a number of expressions of interest are received to the extent that the Administration cannot, within a maximum period of 15 days beyond the date of expiry of the public notice, complete the evaluation of all the expressions of interest received. In this case, the economic operator will be identified as part of the expressions of interest that will be evaluated within this period, provided that they are not less than twenty (n. 20). The evaluation of the expressions of interest received, will follow the time order of arrival recorded by the telematic system of reception of the events for each profile.

This notice is intended as a preventive exploration to collect any expressions of interest, in open mode, from the reference market, which will not be binding for the Marche Region for the next and possible invitation to the procedure of acquisition of the service indicated above.

In addition, in the event that the Administration adheres to a framework agreement of a public central purchasing body for specialist technical assistance services including those listed above, or, to adopt itself a framework agreement or a convention for the containment of public expenditure, the structure responsible for the implementation of StEP project will evaluate the possible withdrawal from the contract pursuant to art. 123 of the Dlgs. 36/2023, except that the contractual conditions of the future contract in question will be more advantageous for the Administration. In this sense, it will be the right of the future contract holder to request the renegotiation of the contractual conditions in order to continue to perform the contract.

No right arises for the applicant by the mere fact of submitting the expression of interest. The Marche Region also reserves the right not to initiate any award procedure, as well as the right to modify/supplement/revoke this notice at any time. It is further noted that no award procedure is hereby initiated.

#### **ART. 8 APPLICATION OF THE ROTATION PRINCIPLE**

Even if it is a market investigation in open mode, the Administration intends to ensure compliance with the principle of rotation, pursuant to art. 49 of D.lgs. 36/2023, when identifying the economic operator to be invited to the procedure of direct award of the service contract, unless, in compliance with the objective criteria of identification of the operator and quality for the performance of the service, the former economic operator is not the only one to have expressed its interest in the investigation. In this case, the interest of the Administration will prevail to receive in any case the service suitable to meet the needs that have emerged, given the actual absence of obvious alternatives on the part of the reference market.

The perimeter to verify compliance with the rotation principle is that referred to the contracting station Regione Marche, identified according to the Unique Registry of Contracting Stations (AUSA), referred to in Article 33-ter of DL 18/10/2012 n. 179, converted with modifications, from L. n. 221 of 17/12/2012.

The principle of rotation shall be ensured against the economic operator who, following a previous direct award or participation in a negotiated tender procedure without a tender, has been affected by the Administration of the Marche Region in the process of awarding a service falling within the same sector as the one in question, identified or identifiable by the CPV 75100000-7 - Services of public administration. The period defining the temporal coherence between the previous and the subsequent proceedings shall be the three years between the date of initiation of the previous procedure and the date of initiation of the subsequent direct award procedure.

In order to allow compliance with the principle of rotation, the economic operator concerned is required to make a special declaration, made pursuant to and for the purposes of art. 46 and 47 of the D.P.R. 445/2000, about the past awarded procedures within the same field of interest here, to which it has been expressly invited by the Administration of the Marche Region during the last three years.

#### **ART. 9 EXEMPTION FROM THE DEFINITIVE GUARANTEE PROVISION**

The possible and subsequent direct award of the service contract will be carried out without the need, for the contractor to provide suitable final guarantee, except in the case of the absence of sound economic and financial conditions. In this case, the final guarantee will be required to the extent of five percent of the contract amount, excluding VAT where applicable.

The soundness of the economic and financial conditions of the entrusted economic operator will be ascertained by examining the last three annual accounts, that is, the last three tax returns for natural persons (in the case of economic operator is a natural person) and at least one reference letter issued by a bank registered in the register of banks supervised by the Bank of Italy.

#### **ART. 10 DATA PROCESSING**

The processing of data sent by interested parties will take place in accordance with the provisions contained in Legislative Decree n. 196/2003 and subsequent, for the purposes solely related to this procedure.

#### **ART. 11 PERSON IN CHARGE OF THE PROCEDURE AND REQUEST FOR CLARIFICATION**

The person in charge of these proceedings, as well as the sole project manager, having the requisites and skills appropriate to the tasks entrusted to him/her pursuant to and for the purposes of Article 15 paragraph 1 of Legislative Decree no. 36/2023, as well as Article 3 of Regional Law no. 19 of 22 July 2013 and Article 3 of R.R. no. 1/20212 and ss.mm.ii. is Ms. **Laura Novelli**, in her capacity of assignee of an organisational position at the Contracting Authority's Economic Development Department.

Any requests for clarification may be addressed only in Italian language to the person in charge of the procedure, in the communications section of the GT-SUAM "Gare e Appalti" portal at <https://appaltisuam.regione.marche.it/PortaleAppalti/it/homepage.wp>

#### **Annex:**

*Request for expression of interest for the specialist support service **available only in Italian language**: Istanza per la manifestazione di interesse per il servizio di assistenza specialistica.*



**The person in charge of the procedure**  
**Laura Novelli**

*Document digitally signed*