

FEC 52/2023- EXPRESSION OF INTEREST PURSUANT TO ART. 1, PARAGRAPH 2, LETT. (B) D.L. JULY 16, 2020, N. 76 FOR THE ACTIVATION OF the specialist technical support SERVICE , REFERRING IN PARTICULAR TO LEAD GENERATION ACTIVITY AIMED AT IDENTIFYING POTENTIAL INVESTORS INTERESTED IN STARTING NEW BUSINESS PROJECTS IN LOMBARDY

**A request for an invitation may be submitted for the activation of the service concerned by the date
09/06/2023 12.00 hours**

Through the “Notifications of the procedure” channel on the Sintel platform in order to participate in the next negotiated procedure for the service described below.

No economic offer should be submitted, but only an invitation request should be submitted on the Sintel platform.

The draft terms and conditions shall not be completed, signed or attached

ANY REQUESTS FOR CLARIFICATION MUST BE RECEIVED THROUGH THE COMMUNICATIONS FUNCTION OF THE PROCEDURE ON THE SINTEL PLATFORM BY THE END OF 01/06/2023 12.00 hours

T&T CLAUSE FOR TRANSPARENCY AND TRACEABILITY (in implementation of D.G.R. no. 5408 of 25.10.2021)

The contractor of the contract, as well as the subcontractors involved in the execution, will be required to comply fully with the provisions of paragraph 2 of Article 105 of legislative Decree 50/2016, paragraph 1 of Article 3 of Law 136/2010 and Article 17 of Law 55/1990.

Non-sensitive information transmitted to the Contracting authority in accordance with the above rules shall be published on the contracting authority's buyer profile and shall be made available to the public throughout the duration of the contract and at least until final testing of the contract.

Failure to provide the information referred to in the above-mentioned rules will be sanctioned by prohibiting the contractor from joining the production process resulting from the contract, as specified in the "T&T contract clause – transparency and traceability".

Pursuant to paragraph 9 of Article 3 of Law No 136/2010, the contracting authority shall verify that the contracts entered into by the contractor and the sub-contractors at any level of the subcontract chain, subject to the penalty of absolute nullity, include the contract T&T Transparency and Traceability clause by which each of them assumes the obligations of traceability of financial flows under Law No. 136/2010.

SHEET: Specialist technical support service, in particular with reference to lead generation activities aimed at identifying potential investors interested in starting new business projects in Lombardy

Type of service	Acquisition of the specialist technical support service for the implementation of Action 1.3.1 <i>Support for the development of the internationalisation of Lombard SMEs and the attraction of foreign investment</i> under the Regional Program ERDF 2021-2027 of Lombardy Region, with particular reference to the attraction of foreign investment, from the European Regional Development Fund.
Service object	<p>Specialist technical support to the Administration, from the European Regional Development Fund, which, in particular, has as its object the research and identification of potential investors interested in launching new business projects in Lombardy (so-called Lead generation activities).</p> <p>In particular, the overall objective of lead generation is to increase foreign direct investment (so-called FDI) on the regional territory, allowing the Administration to gather as many contacts as possible from potential foreign investors with whom a dialog will be initiated with the aim of further promoting the opportunities offered by Lombardy Region and, above all, to carry out the investment project.</p> <p>The specialist technical support service which the regional administration intends to procure shall be characterised by the implementation of the following activities and implementing rules:</p> <ol style="list-style-type: none"> 1. active research of potential investors in foreign markets on the basis of in-depth market analysis 2. planning and conducting (at least) one information interview with potential investors 3. assessment of the degree of commitment of the potential investment and its classification 4. write a monthly report to highlight <ol style="list-style-type: none"> 4.1 total number of contacts generated 4.2 classification of the contact according to the degree of commitment of the potential investment 4.3 summary of potential investment (sector, capital, timing, employment impacts) 5. transfer of contacts collected to the regional administration 6. schedule fortnightly follow-up talks with regional contacts. <p>It should be noted that, by awarding the specialist technical support service in question, the Administration expects to receive a minimum number of leads of 50 and, to that end, at the end of the contract, the balance of the amount due will be based on the number of leads actually provided over to the minimum expectation of 50 total leads.</p>

	<p>As to the degree of substantiality referred to in point 3., however, its value is purely informative and does not affect the lead count for the purposes of quantifying the settlement fee.</p> <p>In this regard, it should be noted that a lead is the contact of a target company with which there have been at least all of the following interactions to be understood as an integral part of the activities and manner of execution:</p> <ul style="list-style-type: none"> i. sending e-mails with brochures (or similar territorial marketing material) on the Lombard ecosystem ii. information call with the target company's CEO/ legal representative concerning: <ul style="list-style-type: none"> a. an overview of the opportunities offered by the Lombard territory b. The investment project in Lombardy iii. sending follow-up emails requesting details of the investment project previously discussed iv. receiving positive feedback from the target company in response to the follow-up email providing the following details: <ul style="list-style-type: none"> a. Type of activity to be developed in Lombardy (e.g., sales office, production plant, etc.) b. estimation of the jobs created by the investment project c. nature of the site to be searched (area size, desired characteristics, requirements, etc.) d. investment amount, if available. <p>The occurrence of the fourth and last step and, above all, the obtaining of the details referred to in letters <i>a.</i> , <i>b.</i>, and <i>c.</i>, qualifies the target company as a lead. It is also requested that the potential investor expresses their intention to start the investment within 24 months of the first negotiations – except for investments in research and development or in other sectors, in exceptional cases (and in any case agreed in advance with the Administration) where the start-up time of the investment may be higher for objective reasons.</p>
<i>Locations where the service is performed</i>	<p>The service is carried out both at the premises of the supplier and remotely via electronic links always agreeing the modalities with the contracting authority. The service must be carried out in close cooperation with the Administration.</p>
<i>Products and their timelines</i>	<p>As already stated, the Administration expects the successful tenderer to undertake to deliver to the Regional Administration a number of at least 50 leads in total.</p> <p>It is required that the leads provided are preferably in one of the following areas:</p> <ul style="list-style-type: none"> a. Life Science and Chemical b. Textiles c. Aerospace d. Design and Furniture e. Agri-Food and Agrifood-Tech f. Fintech

	<ul style="list-style-type: none"> g. Automotive h. Energy and Cleantech i. ICT And Data Centres j. Advanced Manufacturing k. Creative Industries l. Microelectronics. <p>Depending on the type of project, other areas may also be considered.</p> <p>In keeping with the above activities and execution modalities, the additional products envisaged in the performance of the Service are:</p> <ul style="list-style-type: none"> • Fortnightly recap, possibly in Excel format, which will be the subject of the update interview with the regional contacts • Detailed monthly report • Mid-term progress report at the end of the second half of the year • final report at the end of 18 months after the award of this invitation to tender • Other reporting documentation at the request of the regional administration • Any other product related to the areas and themes covered by the requested service. <p>In order to develop this in detail, a Work Plan is required describing the commitments and deadlines for the activities related to the service object to be carried out, including a detailed timetable.</p> <p>The Work Plan must be submitted to the regional contact person of the Administration within 30 days after the date of conclusion of the contract and subsequently validated.</p> <p>The Work Plan must describe how the successful tenderer intends to carry out his service, by defining strategies, actions, products, deadlines, how to organise your work.</p>
<i>Participation requirements and incompatibility</i>	<p>REQUIREMENTS</p> <p>Technical and Professional Skills</p> <p>The economic operator must have performed in the three-year period 2020-2021-2022 (or otherwise in the last three financial years closed and approved at the date of submission of the offer) a service similar to Lead generation for EU or non-EU countries, for a total amount of not less than € 214,000.00 net of VAT.</p> <p>INCOMPATIBILITY</p> <p>Operators participating in the tender must not have ongoing contracts of collaboration and/or technical assistance with private entities benefiting from any concessions granted by resources under the RP ERDF 2021-2027.</p> <p>In particular, the successful tenderer shall undertake the following commitments:</p>

	<ul style="list-style-type: none"> • will refrain from submitting projects on the 2021-2027 ERDF RP of Lombardy Region • Supplier and work team members may not enter into any collaboration and/or technical assistance contracts in any capacity with entities intending to submit projects at ERDF 2021-2027 Regional Plan level.
Work team	<p>The working group shall be composed of the following:</p> <ul style="list-style-type: none"> • A Project Coordinator with expertise in researching and identifying potential investors, with a commitment of no more than two days per month, a graduate (with a master's degree or a specialist's degree diploma obtained under the old system or holding recognised or equivalent degrees for professional purposes obtained from foreign universities), with at least 7 years of professional experience in foreign investment attraction and territorial marketing and at least 4 years of proven experience in the specific function of Manager; • Two Senior Consultants operational project contacts, with a commitment of not less than 6 days/month each, graduates (with a master's degree or a specialist's degree diploma obtained under the old system or holding recognised or equivalent degrees for professional purposes obtained from foreign universities), with at least 5 years of proven experience in foreign investment attraction and territorial marketing. • Three Junior Consultants with a commitment of not less than 6.5 days/month each, graduates (with a master's degree or a specialist's degree diploma obtained under the old system or holding recognised or equivalent degrees for professional purposes obtained from foreign universities), with at least 2 years of proven experience in foreign investment attraction and territorial marketing. <p>All members of the work team are required to be fluent in the English language.</p> <p>The composition of the work team shall be made clear in the technical tender and shall be maintained throughout the duration of the contract.</p> <p>Any replacement of work team members is only permitted if the substitutes present a similar or more qualified curriculum than the substitutes and must in any case be assessed and authorised in advance by the person in charge of the procedure.</p>
Contract Duration	The duration of the service is 18 months.
Auction base	The auction basis amounts to € 214,000.00 excluding VAT

	<table><tr><th>OPERATOR QUALIFICATION</th><th>NUMBER OF DAYS PER MONTH</th><th>NUMBER OF OPERATORS</th><th>TOTAL DAYS PER MONTH</th><th>TOTAL DAYS (i.e., FOR 18 MONTHS)</th></tr><tr><td>Coordinator</td><td>2</td><td>1</td><td>2</td><td>36</td></tr><tr><td>Senior</td><td>6</td><td>2</td><td>12</td><td>216</td></tr><tr><td>Junior</td><td>6.5</td><td>3</td><td>19.5</td><td>351</td></tr><tr><td colspan="4">TOTAL DAYS PER PROJECT</td><td>603</td></tr></table>	OPERATOR QUALIFICATION	NUMBER OF DAYS PER MONTH	NUMBER OF OPERATORS	TOTAL DAYS PER MONTH	TOTAL DAYS (i.e., FOR 18 MONTHS)	Coordinator	2	1	2	36	Senior	6	2	12	216	Junior	6.5	3	19.5	351	TOTAL DAYS PER PROJECT				603
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Sums due payment mode	<p>The payment of the sums due is linked to the number of leads provided to the administration. In particular, the balance payable is parameterised in relation to the actual activity carried out.</p> <p>Specifically, compensation is paid on the basis of three tranches:</p> <ul style="list-style-type: none">I. 20 % of the amount following validation of the abovementioned Work Plan by the administrationII. 60 % following receipt of the interim progress report at the end of the second semester of the contractIII. 20 % paid only if, at the end of the 18 months, the successful tenderer has supplied at least 50 leads.																									
Technical Offer Content	<p>The project must contain a technical proposal , preferably written in English, composed of up to 20 pages (single side), describing:</p> <ul style="list-style-type: none">- Reference context consistent with the service subject matter of this award (i.e., knowledge of the Lead generation service, market analysis, dynamics of inbound and outbound investment trends and, territorial marketing), which also highlights the level of knowledge of the Lombard ecosystem- The adequacy of the technology/IT tools used to make the search for potential investors more efficient- A portfolio of success stories with description, public/private buyer, amount of invested capital and, if possible, names of companies that made the investment- The methodology and organisational and management arrangements for the service organisation and implementation- The work team’s organisational chart and composition, highlighting the competences, professional qualifications, experience of the individual members as specified below and the roles and responsibilities within the team and in relation to the client- Any services offered in view of the possible impact of the activity carried out.																									
Scores	<p>Award on the basis of the most economically advantageous tender in accordance with the following scores:</p> <ul style="list-style-type: none">• Technical offer max 70 points• Budget offer max 30 points																									

<i>Evaluation criteria</i>	<p>TECHNICAL OFFER (maximum 70 points) broken down as follows:</p> <p>A. PROFESSIONALISM AND ADEQUACY OF THE OFFER (MAXIMUM 30 POINTS)</p> <p>A.1 Professional knowledge of the reference context and methodology (max. 15 points)</p> <p>A.1.1 level of depth, clarity, meaningfulness of the analysis produced in relation to the service subject to this tender (i.e., knowledge of Lead Generation) and eligibility of the proposed methodological solutions (max. 10 points) Discretionary Criterion</p> <p>A.1.2 General knowledge of Lombardy's economic and entrepreneurial fabric and the main macroeconomic data of Lombardy (max 5 points) Discretionary Criterion</p> <p>A.2 Tool (max 5 points) Adequacy of the business intelligence technology/IT tools available (e.g., foreign direct investment databases, etc.) Discretionary Criterion</p> <p>A.3 Expertise of the Successful Tenderer (max. 10 points)</p> <p>A.3.1 Number of years of experience in the specific field of finding potential foreign investors, including as or in collaboration with Investment Promotion Agencies (so-called IPA) in territorial government bodies (max 5 points) Proportional Calculation</p> <p>A.3.2 Success Story Portfolio and Description (max 5 points) Discretionary Criterion</p> <p>B. ORGANISATION AND STAFF INVOLVED (up to 35 points)</p> <p>B.1 Team Work Minimum Quality (max 30 points)</p> <p>B.1.1 Number of years of professional experience, additional to the minimum required, in foreign investment attraction and territorial marketing with reference to the minimum work team (max. 15 points) Proportional Calculation</p> <p>B.1.2 number of years of experience in the provision of Lead generation services in favour of the public Administration (Italian or foreign countries) (max 15 points) Proportional Calculation</p> <p>B.2 Organisational Model (max 5 points) Number of operating subsidiaries/branches of the successful tenderer in EU and non-EU countries</p>

	<p>EVALUATION TABLE</p> <table border="1"> <tr> <th>NO. SUBSIDIARIES/BRANCHES (IN DIFFERENT COUNTRIES)</th><th>SCORE</th></tr> <tr> <td>1</td><td>0.5</td></tr> <tr> <td>2-3</td><td>1.5</td></tr> <tr> <td>4-5</td><td>3</td></tr> <tr> <td>6-7</td><td>4</td></tr> <tr> <td>8-over</td><td>5</td></tr> </table> <p>C. Additional services (up to 5 points) Services offered in consideration of the possible impact of the activity carried out Discretionary Criterion</p> <p>The declarations referred to in points A.3.1, B.1.1, B.1.2 and B.2 of this paragraph shall be made by completing the self-certification form attached to the technical tender.</p> <p>A technical eligibility threshold of 40/70 points shall be set. Competitors who have not achieved a score of at least 40 points in the technical evaluation will be excluded from the procedure and no economic offer will be opened.</p> <p>ECONOMIC OFFER (up to 30 points)</p>	NO. SUBSIDIARIES/BRANCHES (IN DIFFERENT COUNTRIES)	SCORE	1	0.5	2-3	1.5	4-5	3	6-7	4	8-over	5
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<p>Privacy: specify whether the supplier will process personal/sensitive data on behalf of Lombardy Region</p>	<p>The supplier shall not process personal/sensitive data on behalf of Lombardy Region. The contacts of potential investors which the successful tenderer undertakes to send to the regional authority refer to a list of e-mail addresses of the companies/entities that are potentially interested in investing in the regional territory.</p>												