PUBLIC NOTICE FOR COMPARATIVE SELECTION

Specialist services for the cross-border regenerative tourism strategy

Project	CROSS-HERITAGE - Cross-Border Heritage Valorisation for Sustainable Tourism
Project code	00047
Programme	Interreg VI-A Italy-Malta Programme 2021-2027
Specific objective	RSO4.6 – Enhancing the role of culture and sustainable tourism in economic development, social inclusion and social innovation
Lead Partner	Fondazione MeSSInA - Ente Filantropico
Contracting Entity	Fondazione Horcynus Orca - FHO
Partnership	Fondazione MeSSInA, Fondazione Horcynus Orca, Malta Regional Development and Dialogue Foundation, Friends of the Earth Malta
Maximum amount	EUR 57,000.00, including VAT and all charges, excluding authorised travel expenses
Deadline	16 October 2026 at 23:59

In case of discrepancies between the Italian and English versions of this notice, the Italian version shall prevail.

1. Contracting Entity

Fondazione Horcynus Orca, Partner No. 2 of the CROSS-HERITAGE project, VAT No. 02636810836, with registered office at Largo Senatore Francesco Arena, 98164 Messina, represented by its President and legal representative, Prof. Giuseppe Giordano, hereinafter also referred to as “FHO” or the “Contracting Entity”.

Person responsible for the procedure: Pasquale Monteleone, Administrative Manager
Contact for requests for clarification: lino.monteleone@horcynusorca.it
Certified email (PEC) for submission of offers: fho@legalmail.it

2. Background and project context

CROSS-HERITAGE addresses the underuse of areas of high natural and cultural value in Capo Peloro (Messina, Italy) and Comino (Malta), both connected to Natura 2000 sites. The project activates two heritage-based hubs, develops physical and digital interpretation tools and builds a cross-border tourism ecosystem focused on learning, environmental protection and territorial regeneration.

FHO leads WP4 – Joint Regenerative Tourism Strategy and is responsible for coordinating the design, testing and refinement of the joint strategy for Capo Peloro and Comino. The approved budget includes one unit entitled “Cross-border tourism experience strategy experts” for a maximum amount of EUR 57,000.00 under the External expertise and services cost category.

3. Regulatory framework and nature of the procedure

The procedure is carried out in compliance with the Programme documents, the approved project, the Contracting Entity's internal rules and the principles of transparency, competition, equal treatment, non-discrimination, proportionality, traceability, absence of conflicts of interest and best value for money.

Where applicable to the legal status of the Contracting Entity and to the assignment, Italian Legislative Decree No. 36/2023, as subsequently amended, European public procurement legislation and the Financial Regulation of the European Union shall apply.

This notice constitutes a comparative selection procedure and does not create any entitlement to the award of the contract.

FHO may suspend, amend or cancel the procedure for duly justified reasons, without participants being entitled to claims or compensation.

4. Scope of the assignment

The assignment concerns specialist services for the design, implementation, testing and consolidation of the Joint Regenerative Tourism Strategy for Capo Peloro and Comino.

The contractor shall provide a multidisciplinary team and work in support of FHO, without replacing FHO in its responsibilities as project partner, Work Package leader, owner of the deliverables and contact point towards the partnership and the Managing Authority.

5. Activities required

5.1 Phase A – Strategy design

The contractor shall carry out the following activities:

- analysis of the territorial context, visitor flows, pressures and opportunities of Capo Peloro and Comino;
- targeted benchmarking of European practices in sustainable and regenerative tourism;
- definition of the shared destination identity and value proposition;
- identification and profiling of target audiences consistent with responsible, experiential and learning-oriented tourism;
- co-design of integrated experiences, visitor pathways and thematic itineraries;
- definition of accessibility, low environmental impact and visitor management criteria consistent with the protection requirements of the sites concerned and with applicable constraints, including those related to the Natura 2000 network;
- development of a strategic communication and positioning framework supporting Activity A4.2;
- engagement and capacity building of tourism operators and local stakeholders;
- technical preparation, in coordination with FHO and the project partnership, of the draft Deliverable D.4.1.1 and related supporting materials.

5.2 Phase B – Implementation, testing and consolidation

The contractor shall carry out the following activities:

- support for the definition of the pilot calendar and promotional approach for implementation of the strategy;
- operational development of two local itineraries and one cross-border itinerary, based on the strategic guidelines defined;
- technical and methodological assistance for the testing of itineraries, packages, events and experiences, including the two thematic residencies foreseen by the project;

- support for the involvement of tourism operators, cultural organisations, intermediaries and other relevant stakeholders in testing activities;
- collection, systematisation and analysis of qualitative and quantitative feedback generated by the pilot activities;
- methodological coordination with the visitor-flow monitoring and learning-outcome activities foreseen under A4.3 and use of the resulting evidence for refinement of the strategy;
- review and refinement of offers, narratives, targeting and visitor guidance measures based on the results of the testing activities;
- final consolidation of the strategy and preparation of technical recommendations concerning the sustainability, replicability and capitalisation of the cross-border model.

6. Internal deliverables and timetable

Code	Product	Indicative deadline
D1	Inception report, methodology, work plan, responsibility matrix and meeting plan	Within 20 days of contract signature
D2	Benchmarking, context analysis, stakeholder analysis and target audience	By Project Month 4
D3	Destination identity, value proposition and positioning framework	By Project Month 7
D4	Full draft strategy, including itineraries, visitor management and communication framework	By Project Month 10
D5	D.4.1.1 - Joint regenerative tourism strategy for Capo Peloro and Comino	By Project Month 12
D6	Pilot plan and support for the calendar, promotion and residencies	Months 13-18
D7	Interim report on testing, feedback and proposed adaptations	By Project Month 21
D8	Consolidated strategy, final report and contributions to capitalisation	By Project Month 24

The work plan shall be adjusted to the actual date of contract signature, without prejudice to compliance with the deadlines set out in the project timetable. FHO may request reasonable updates and revisions until the outputs have been approved, without altering the nature or value of the assignment.

The main strategic documents shall be prepared in English, with operational summaries in Italian. Materials intended for stakeholders may be required in Italian or English depending on the territory concerned.

7. Physical presence, meetings and travel

The contractor shall ensure the physical attendance of at least two members of the working team at the following six events:

1. local co-design workshop in Capo Peloro;
2. local co-design workshop in Comino;
3. cross-border co-design workshop at the Horcynus Orca Park in Messina;
4. six-day, five-night thematic residency in Capo Peloro;
5. six-day, five-night thematic residency in Comino;
6. final conference and capitalisation session in Messina.

Authorised travel, accommodation and subsistence expenses are excluded from the maximum contractual amount of EUR 57,000.00. Such expenses shall either be organised directly by FHO or

by the relevant project partners, or reimbursed without mark-up, within the project ceilings and subject to prior written authorisation.

Tickets, boarding passes, invoices/receipts, proof of payment, attendance records and any other supporting documents required by the Programme shall be retained and provided.

No reimbursement shall be due for travel that has not been authorised in advance or for which the required supporting documentation is not provided.

8. Duration and place of performance

The contract shall commence on the date of signature and shall end no later than the completion date of the project, currently scheduled for 31 August 2028.

Any extension of the project may result in a non-cost extension of the contractual term, subject to notification and written agreement.

Activities shall be carried out remotely and in person in Messina/Capo Peloro and Comino/Malta, as well as at any other premises of the project partners that may be agreed upon.

The contractor shall demonstrate stable capacity for cross-border coordination.

9. Maximum amount

The maximum total value of the service is EUR 57,000.00, inclusive of VAT, social security contributions, taxes, charges, overheads and any other costs, with the sole exception of authorised travel expenses pursuant to Article 7.

Offers exceeding this amount shall not be accepted.

The financial offer shall indicate the taxable amount, VAT or applicable tax regime and the total amount.

For comparison purposes, the total cost borne by FHO shall be taken into consideration, excluding the travel expenses referred to above.

10. Payment arrangements

The contractual fee shall be the amount resulting from the successful tenderer’s financial offer and shall in no case exceed the maximum amount of EUR 57,000.00, inclusive of VAT, social security contributions, taxes, charges, overheads and any other costs, without prejudice to the arrangements applicable to authorised travel expenses under Article 7.

Without prejudice to the total contractual amount and to consistency with the project budget and timetable, FHO and the contractor may agree in writing on a different timing and structure of payments, where this is conducive to the proper performance of the service and compatible with the Programme’s eligibility and reporting rules.

In the absence of a different written agreement, and in accordance with the temporal allocation of the relevant budget item in the approved CROSS-HERITAGE project budget, the contractual fee shall be paid as follows:

a) first instalment, up to EUR 27,000.00, during Project Period 1 (September-December 2026), following the proper performance and approval by FHO of the activities and outputs foreseen for the initial phase of the assignment;

b) final balance, up to EUR 30,000.00, during Project Period 6 (May-August 2028), following completion of the contractual activities and approval by FHO of the final outputs.

Where the fee resulting from the successful financial offer is lower than the maximum amount established for the procedure, the amounts of the instalments shall be adjusted in the contract consistently with the awarded amount.

Each payment shall be subject to verification of the proper performance of the services and approval of the relevant outputs by FHO, as well as submission of a valid invoice, in electronic form where applicable, indicating the project CUP, the acronym CROSS-HERITAGE and a reference to the Interreg VI-A Italy-Malta Programme 2021-2027.

Payment shall also be subject, where applicable, to the contractor's tax and social security compliance and to the submission of reports and any additional documentation required for Programme reporting and management verifications.

Payments shall be made within 30 days of receipt of a valid invoice, subject to successful verification of the conditions set out above.

Authorised travel, accommodation and subsistence expenses are excluded from the contractual fee and shall be treated separately in accordance with Article 7.

11. Eligible applicants

Economic operators meeting the required eligibility conditions may participate.

CROSS-HERITAGE beneficiaries and associated partners may not participate, including as team members or subcontractors, as project activities may not be delegated to them.

12. Minimum requirements

Applicants shall meet the following minimum requirements:

- absence of grounds for exclusion or other impediments to contracting and absence of conflicts of interest;
- registration with the relevant Chamber of Commerce, professional register or equivalent register for activities consistent with the subject matter of the assignment;
- compliance with tax and social security obligations and occupational health and safety legislation, where applicable;
- at least five years of relevant activity as at the publication date of this notice;
- total revenues for the last two approved financial years of not less than EUR 57,000.00;
- availability of the minimum multidisciplinary team referred to in Article 13;
- ability, at team level, to work professionally in both Italian and English.

Foreign economic operators may submit equivalent documents in accordance with the legislation of their country of establishment.

FHO may request clarifications and supporting documents before the award.

13. Minimum working team

Role	Minimum requirements
Coordinator / Team leader	Relevant university degree or equivalent qualification; at least 5 years of experience; coordination of at least three tourism or destination development strategies or plans; experience in complex projects and in working in English.
Regenerative tourism and destination development expert	At least 3 years of experience in positioning, tourism products, itineraries, destination management or sustainable tourism.
Heritage interpretation, environment and visitor management expert	At least 3 years of experience in natural/cultural heritage, protected areas or Natura 2000, interpretation and visitor-flow management.
Communication and stakeholder engagement expert	At least 3 years of experience in experience design, storytelling, audience development, co-design or capacity building.

The team shall consist of at least three persons.

One person may cover no more than two roles, provided that they meet the relevant requirements.

At least two team members shall be available to attend all in-person events referred to in Article 7.

Any replacement following the award shall require prior authorisation from FHO and shall involve profiles with qualifications and experience at least equivalent to those originally proposed.

14. Documents to be submitted with the offer

The following documents shall be submitted:

- Annex A – Application Form;
- Annex B – Declaration on eligibility requirements, integrity and absence of conflicts of interest;
- Annex C – Technical Offer;
- Annex D – Financial Offer;
- CVs of the proposed team members, dated and signed;
- Chamber of Commerce registration certificate or equivalent document;
- the last two approved financial statements or equivalent documentation;
- identity document of the signatory;
- acknowledgement of the Privacy Notice referred to in Annex E.

15. Submission of offers

Offers must be received no later than 23:59 on 16 October 2026 by certified email (PEC) at:

fho@legalmail.it

with the subject line: “CROSS-HERITAGE – Tourism Strategy Offer”

For foreign economic operators without access to an Italian PEC account, submission by ordinary email shall be permitted, provided that the documents bear a qualified electronic signature, to: info@horcynusorca.it

The documentation shall be digitally signed or signed by hand and accompanied by an identity document.

Offers may be submitted in Italian or English.

Late, conditional, partial offers, offers exceeding the maximum amount, or offers without a signed financial offer shall not be considered.

16. Clarifications

Requests for clarification may be submitted by 9 October 2026 to: lino.monteleone@horcynusorca.it

with the subject line: “Clarification – CROSS-HERITAGE Notice”

Replies and any updates shall be published through the same channels used for the notice, without disclosing the identity of the applicant requesting clarification.

17. Evaluation criteria and scoring grid

The contract will be awarded on the basis of the best price-quality ratio, with a maximum of 100 points: 80 for the technical proposal and 20 for the financial proposal. Proposals will be assessed against the criteria and sub-criteria set out in the following grid, which specifies the respective maximum scores.

Criterion	Points
A. Experience of the economic operator	15
A.1 Relevance of the experience presented to sustainable or regenerative tourism strategies, destination development and the valorisation of natural and cultural heritage.	10
A.2 Complexity of the experience presented, results achieved and their relevance to the required service.	5
B. Quality of the methodology	25
B.1 Consistency, practical detail and suitability of the methodology for analysing and designing the joint strategy, taking into account the specific characteristics of Capo Peloro and Comino, site conservation, accessibility and visitor management.	15
B.2 Suitability of the methods for co-design, testing experiences and itineraries, collecting feedback and consolidating the strategy.	10
C. Quality and complementarity of the working team	25
C.1 Relevance and strength of the team members’ skills and experience, including those of the coordinator, in relation to the required roles and activities.	15
C.2 Complementarity of the profiles and consistency of the allocation of roles and responsibilities.	10
D. Work plan, territorial presence, stakeholder engagement and overall quality	15
D.1 Clarity and feasibility of the work plan in relation to deliverables, deadlines, coordination and quality control of the outputs.	8
D.2 Suitability of the organisational arrangements for the six in-person events, stakeholder engagement and operational coordination across the two territories.	7
E. Financial offer	20
Total	100

For each technical sub-criterion, each evaluation committee member will assign a score between zero and the maximum specified in the scoring grid, based on the technical proposal and the documentation submitted.

The score for each sub-criterion will be the arithmetic mean of the scores assigned by the committee members. The overall technical score will be the sum of the sub-criterion scores, without rescaling or intermediate rounding. Compliance with the minimum technical score and the ranking of proposals will be determined using unrounded values; scores will be displayed to two decimal places.

Merely meeting the minimum participation requirements does not automatically confer points.

Only proposals achieving a technical score of at least 48/80 will proceed to financial evaluation. The financial score will be calculated using the following formula: **Financial score = 20 × (lowest total price / total price offered)**. The technical proposal will be assessed against the criteria and scores specified above. In the event of a tie, the proposal with the higher technical score will take precedence; if the tie persists, the proposal with the higher score for methodology will take precedence; if the tie still persists, a drawing of lots will be held and recorded in the minutes.

18. Evaluation Committee and procedure

Following the submission deadline, FHO shall appoint an Evaluation Committee.

Committee members shall sign declarations confirming the absence of conflicts of interest and incompatibilities.

The Committee shall verify the administrative documentation, evaluate the technical offers and apply the formula for the financial score.

FHO may request clarifications, provided that such clarifications do not result in substantial amendments to the offer.

19. Award and verification

FHO may proceed with the award even where only one valid offer has been received, provided that it is considered appropriate and adequate.

FHO may also decide not to proceed with the award where none of the offers meets the project's requirements.

The award shall become effective following verification of the eligibility requirements and signature of the contract.

20. Essential obligations

The contractor shall be required to ensure:

- direct and responsible performance of the activities through the team proposed in the offer;
- compliance with the project, the Programme, FHO instructions and applicable deadlines;
- traceability of activities, periodic reporting and retention of supporting documents;
- invoices indicating the project CUP, the CROSS-HERITAGE acronym and reference to the Programme;
- confidentiality, data protection and absence of conflicts of interest;
- cooperation with FME, MRDDf, FoEM and relevant stakeholders, without prejudice to FHO's responsibilities;
- compliance with European Union information and communication obligations;
- availability for controls, audits and management verifications.

21. Ownership of results

All materials and results produced under the assignment shall be made available to FHO and the project partnership for the purposes of project implementation, reporting, communication, dissemination, capitalisation and replication.

Moral rights and rights relating to any pre-existing tools or materials of the contractor shall remain unaffected, provided that such tools or materials are declared in the offer.

To the extent necessary for project purposes, the contractor shall grant an irrevocable, royalty-free, non-exclusive and worldwide licence for their use.

22. Data protection, publication and transparency

Personal data collected in connection with this procedure shall be processed in accordance with Regulation (EU) 2016/679 and as set out in Annex E – Privacy Notice. This notice, together with all related annexes, shall be published in full on the institutional website of Fondazione Horcynus Orca.

The procedure shall also be promoted through the institutional websites of the project partners by means of dedicated communications linking to the full publication available on the FHO website. In accordance with the obligations set out in the Manual on expenditure reporting procedures and management verifications of the Interreg VI-A Italy-Malta Programme 2021-2027, the procedure shall also be transmitted to the Programme Joint Secretariat for publication on www.italiamalta.eu.

Any clarifications, corrections, extensions or other relevant communications relating to the procedure shall be published on FHO's institutional website and, where appropriate, through the same channels used for publication and dissemination of the notice. The outcome of the procedure shall be published on FHO's institutional website and communicated through any additional channels required by the Programme, in accordance with the applicable transparency, information and communication obligations.

For Fondazione Horcynus Orca
President and legal representative
Prof. Giuseppe Giordano

Professore
GIUSEPPE
GIORDANO
06.10.2026
11:11:44
GMT+02:00

Signature _____