



Ref. 303.02.20.13

OBJECT: OPENING PROCEDURE FOR THE SELECTION OF AN EXPERT TO PROVIDE TECHNICAL ASSISTANCE IN THE FIELD OF DIGITAL HEALTH AND INNOVATION (SOCIAL IMPACT EVALUATION AND POLICY GUIDELINES) WITHIN THE PROCAREFUL “PRO.ACTIVE CARE FOR U.SERS L.IFE” PROJECT (CE0100187), CO-FINANCED THROUGH THE FIRST CALL OF THE PROGRAMME INTERREG CENTRAL EUROPE 2021-2027.

Trieste, 11th June 2024

The Central European Initiative - Executive Secretariat (hereinafter referred to as CEI-ES) is a Project Partner of the Project PROCAREFUL “PRO.ACTIVE CARE F.OR U.SERS L.IFE”, (hereinafter referred to as the "Project"), co-financed by the Interreg Central Europe 2021-2027 Programme.

The Project – which has a duration of 36 months, from 01/03/2023 - 28/02/2026, and a total budget of EUR 2.290.000,00 aims at tackling the challenge of the existing urban and rural gap in home care accessibility and timely delivery by pushing the uptake of innovative digital solutions and upscaling the existing health and social care services by moving them from a reactive towards a **proactive care approach**. To achieve this, partners work on a solution that combines **face-to-face care with remote and digital support based on machine learning and artificial intelligence: the PROCAREFUL model for hybrid home care services** to support independent living of older and vulnerable people in need of care, which will be tested in five regions. The project involves six EU Member States: Croatia, Italy, Germany, Hungary, Poland, and Slovenia.

The Consortium is composed of the following actors:

1. Institute for Older Care and Sheltered Homes – ISRAA (IT) - Lead Partner
2. Anton Trstenjak Institute of Gerontology and Intergenerational Relations (SI)
3. Polish Foundation of the Opportunities Industrialization Centers “OIC Poland” (PL)
4. IFKA Public Benefit Nonprofit Ltd. (HU)
5. Central European Initiative - Executive Secretariat (CEI-ES) (IT)
6. Association Mi (HR)
7. Welfare organization for Baden-Württemberg (DE)
8. Municipality of Log – Dragomer (SI)
9. Britenet Ltd. (PL)

The activities of the Project are grouped into the following three “Work Packages”:

1. Advancing the uptake of digital innovation in home care by proactive – hybrid home care model adoption;
2. PROCAREFUL pilot site implementation in 5 home care services in the Central Europe area;
3. PROCAREFUL model evaluation and policy strategy.

The CEI is responsible for Work Package 3 - the development of the social impact evaluation of the PROCAREFUL model and the development of policy guidelines in a strategic framework of analysis. The impact evaluation will assess the changes generated in the governance and organizational model of care provision by PROCAREFUL in the 5 pilot sites. It will focus specifically on the empowerment of the final beneficiaries. From the outset, the evaluation will require the identification and involvement of key stakeholders to ensure comprehensive input and support, as well as the construction of a detailed set of impact indicators. **Strong multi-stakeholder engagement is necessary to inform policy strategies and to consider the different**



characteristics of the involved areas. The ultimate goal is to scale up innovative care models by informing policymakers and stakeholders through the impact evidence.

The CEI- ES is launching this awarding procedure with the aim to subcontract an expert that shall provide technical assistance in the implementation of work package 3 activities, in particular the delivery of the PROCAREFUL evaluation model of ICT based integrated care (D.3.1.2), the multidimensional qualitative impact assessment of change generated by the innovative services and care provision models (D.3.1.2) and the Policy Guidelines regarding innovation, scaling up and transferability strategies, focusing on introduction and development of innovative care models involving key stakeholders at regional/transnational level (D.3.2.2). The specific format of the reports will be agreed upon awarding. The assignment shall be carried out independently, but in close cooperation with the Project team.

Art.1 – DESCRIPTION OF SERVICES

1. The purpose of this tendering procedure is to select an expert to provide technical assistance for the implementation of the strategic project PROCAREFUL of which CEI-ES is Partner.
2. The following activities are the subject of the assignment referred to in point a) in particular:
 - a. To deliver the PROCAREFUL evaluation model of ICT-based integrated care (D.3.1.1) combining multidimensional qualitative/quantitative methods for measuring impact and guide policy strategies.
 - b. To deliver a multidimensional qualitative impact assessment of change generated by innovative services and care provision models (D.3.1.2), with particular focus on organisational aspects (change management), service definition (theory of change) and quality of care (usability, satisfaction, empowerment). Impact evaluation findings should inform scaling-up strategies— accounting for the different characteristics of the involved areas— linking evaluation and policies strategies in a consistent analysis framework.
 - c. To deliver policy guidelines regarding innovation, scaling up and transferability strategies, focusing on introduction and development of innovative care models involving key stakeholders at regional/transnational level (D.3.2.2)
 - d. To support the CEI-ES in the preparation of a document summarising the principles of the PROCAREFUL model, Partners' implementation, experiences, and results (final Output 3.1)— including the impact evaluation on organisations and key actors.
3. Participation is open to individual experts, group of experts, educational and research institutions, and economic operators, provided that their operational capacity is adequate to fulfilling the assignment.
4. The successful bidders shall perform the tasks mentioned under 2. in close cooperation with the CEI-ES and the Project team, who will also provide information about the exact format of the reports and other technical requirements.
5. The successful bidder shall deliver the respective reports mentioned under point 2. in English.
6. The successful bidder shall work independently and shall sign a relevant contract with CEI-ES.
7. The duration of the assignment is established from 01/09/2024 or the date of signing of the contract, whichever comes first and shall last until the end of the Project (currently set at 28/02/2026).

Art.2 – AMOUNT OF THE CONTRACT

- a) The maximum amount of the contract that will be signed is set in EUR 25.000,00 (twentyfivethousand/00), which shall be deemed as all-inclusive, comprising any travel and accommodation expenses as well as any other tax or social security charges related to the performance of the assignment. Note that VAT is to be understood as excluded pursuant to art. 72 of Presidential Decree 26/10/1972, no. 633.

Art.3 – REQUIREMENTS

- a) Applicants shall meet the following requirements:
- 1) No situations, causes or reasons determining the inability to contract with the Public Administration in the legal systems of the country of origin and/or in the country where the service is to be rendered, also as provided for by Article 57 of Directive 2014/24/EU.
 - 2) Be in regular and legitimate possession of the requirements, as provided for and required by the law of the country of origin and/or the country in which the service is to be provided, for the exercise of the activity requested (¹).
 - 3) To have a proven track-record in carrying-out one similar assignments (also at the academic level) in disciplines, Health and Innovation / Social impact evaluation on health policies / Policy strategies on health care models, or other relevant to this assignment.
 - 4) Be in possession of adequate technical and organisational capacity proven by the presence, as an integral part of their organisation, of personnel competent in the matters entrusted to them. The latter as well as Individual experts shall have a higher education degree (MSc or equivalent) in one of the disciplines, related to Health and Innovation.
- b) The requirements referred to in point (a) shall be self-declared. Such declarations may be subject to verification by the CEI-ES at any time, in the manner and within the time that it deems most appropriate. The decision of the CEI-ES may determine, at the sole discretion of the CEI-ES, the nullity of the award made and/or of the contract stipulated, or the right of the CEI-ES to withdraw from the latter without any penalty, without prejudice to the right to maintain, in whole or in part, the effects of the same until the time of withdrawal.

Art.4 – AWARDING CRITERIA

- a) The awarding criterion is that of the most economically advantageous offer. Owing to the nature of the assignment and the need to ensure high-level expertise, predominance is attributed to technical criteria.
- b) Awarding criteria are determined as follows:

Technical offer	
1. Qualifications (education and formal training) [Opt-inadequate; 5pts.- BA or MSc; 10pts.-PhD or equivalent]	<i>Max 10 points</i>
2. Previous Experience (number and scope of similar assignments) [Opt-inadequate; 10pts.- < 5 yrs.; 15pts. - > 5 yrs.; 20pts. - > 10 yrs.]	<i>Max 20 points</i>
3. Methodology (Quality and innovativeness of the methodological proposal for carrying out the technical assistance service)	<i>Max 40 points</i>

¹ If this requirement is met (in accordance with Article 3(b)), companies could be required to provide a certificate of regular registration with the Chamber of Commerce, Industry, Crafts and Agriculture.



<p><i>Please, provide a summary description of the proposed methodology for each of the required elements, listed above (Art.1.2) mentioned in this call (max. 5 pages IN TOTAL)</i></p> <p><i>[Opt-inadequate; 5pts.-scarce; 10pts.-adequate; 15pts.-good; 20pts.-very good]</i></p>	<p><i>(Up to 20 pts. For each report)</i></p>
<p>4. Additional services</p> <p><i>[Opt-no additional services; 5pts.- adequate; 10pts.- above expectations]</i></p>	<p><i>Max 10 points</i></p>
<p>Economic offer</p> <p><i>(Discount offered by the applicant in % / maximum discount in %)</i></p>	<p><i>Max 20 points</i></p>
<p>TOTAL</p>	<p>Max 100 points</p>

- c) The awarding will be made even in the presence of a single valid tender, provided that it is considered appropriate and convenient by CEI-ES. CEI-ES may decide not to proceed with the awarding of contracts if, in its sole discretion, no offer proves to be convenient or suitable. Therefore, this call for proposals does not impose any obligation on CEI-ES to assign the service.

Art. 5 – PROCEDURE

This awarding procedure is divided into the following stages:

a) *Formulation of the technical and economic offer*

In order to participate in this procedure, each bidder must produce, under penalty of exclusion, the following documentation:

- 1) application for participation (and related declarations) drawn up in accordance with the template in ANNEX 1, signed by the bidders and accompanied by a photocopy of the identity document. In the case the participant is an economic operator, the signature must be that of the legal representative;
- 2) Copy of this invitation signed on all pages for acceptance of the terms and conditions;
- 3) Curriculum vitae of the expert(s) that will perform the service, updated and signed. The CV must be delivered in English using Europass format (<https://europass.cedefop.europa.eu/>);
- 4) The technical offer in which the bidders shall provide in exhaustive yet concise format sufficient information to evaluate the criteria listed in Art.4 (b), and in particular:
 - the qualifications (ref. Art.4(b.1));
 - the specific experience in similar assignments and studies (also at academic level);
 - the foreseen methodology. Considering that the exact format of the report will be defined at a later stage, the bidders shall demonstrate knowledge of the Health and Innovation sector briefly describing the methodology and approach proposed for each of the required elements listed in Art.1. point 2 in a maximum of 5 pages in total.
 - additional services. The bidders can here provide information on additional services offered, such as, for instance, dissemination, support in the organization of events, availability to participate in PROCAREFUL events, country-specific fact sheets etc.
- 5) The economic offer, drawn up in accordance with the model in Annex 2, duly signed.

b) *Tendering procedure and awarding*

The CEI-ES will verify the completeness of the documentation produced and verify the requirements. Technical and economic offers will be evaluated only for applications fulfilling these pre-requisites.

Art. 6 - OBLIGATIONS ON THE TENDERER

- a) The awarding notice shall be deemed immediately binding for the successful bidder, while the CEI-ES will



be bound by the signature of the relevant contract.

- b) The award does not give the successful bidder any exclusive right over the service in question and CEI-ES reserves the right to award other and different assignments to third parties.
- c) The successful bidders shall undertake to:
 - maintain the utmost confidentiality of the information acquired in the performance of their duties;
 - not to make use, either directly or indirectly for their own benefit or that of third parties of the mandate entrusted and the information of which they will become aware in relation to it, and this even after the expiry of the contract;
 - ensure effective operational coordination with CEI-ES, the Project team, and particularly the leader of relevant Work Package;
 - participate in virtual meetings related to the assignment;
 - indemnify CEI-ES from any possible claim for compensation for accidents (of any kind) of the members of the working group employed in the service that may occur in the performance of the assignment, including the part of the activity performed by them within the premises of the Customer.

ART. 7 - DEADLINE AND PROCEDURES FOR SUBMISSION OF PROPOSALS

- a) Applicants shall hand in or deliver their bids via ordinary or express mail or courier at the address detailed under point b), no later than **16.00 CET of July 2nd 2024**. No other form of submission will be accepted. CEI-ES is not liable for any delays in delivery or misdelivery.
- b) Packages or envelopes containing tenders should be addressed to:

CENTRAL EUROPEAN INITIATIVE – EXECUTIVE
SECRETARIAT
VIA GENOVA 9 – 34121 TRIESTE (TS)
ITALY

- c) All tender documents shall be drafted in English.
- d) The package or envelope containing the tender documentation must, under penalty of exclusion, be sealed and signed on all the closing edges. The following must be written on the outside:
 - the sender's header and address.
 - the header and address of CEI-ES.
 - the words: "DO NOT OPEN - TENDER FOR PROCAREFUL PROJECT".
- e) The package must contain, under penalty of exclusion, three separate envelopes:
 - 1) ENVELOPE A: a sealed envelope bearing the sender's heading and the words "ENVELOPE A - ADMINISTRATIVE DOCUMENTATION", which must contain the following documentation:
 - application for participation (and related declarations) drawn up in accordance with the template in ANNEX 1, signed by the bidders and accompanied by a photocopy of the identity document. In the case the participant is an economic operator, the signature must be that of the legal representative.
 - Copy of this invitation signed **on all pages** for acceptance of the terms and conditions;
 - 2) ENVELOPE B: a sealed envelope bearing the sender's heading and the words "ENVELOPE B - TECHNICAL OFFER", which must contain the following documents:

- Curriculum vitae of the expert(s) that will perform the service, updated and signed. The CV must be delivered in English using Europass format (<https://europass.cedefop.europa.eu/>);
 - The technical offer in which the bidders shall provide in exhaustive yet concise format sufficient information to evaluate the criteria listed in Art.4 (b), and in particular:
 - (a) the specific experience in similar assignments and studies (also at academic level);
 - (b) the foreseen methodology. Considering that the exact format of the report will be defined at a later stage, the bidders shall demonstrate knowledge of the Health and Innovation sector briefly describing the methodology and approach proposed for each of the required elements listed in Art.1. point 2 in a maximum of 5 pages in total;
 - (d) The bidders can here provide information on additional services offered, such as, for instance, dissemination, support in the organization of events, availability to participate in PROCAREFUL events, country-specific fact sheets etc.
- 3) ENVELOPE C: a sealed envelope bearing the sender's header and the words “ENVELOPE C – ECONOMIC OFFER” sealed and countersigned on the closing edges, which must contain the economic offer to be submitted using the forms referred to in ANNEX 2.
- f) A tenderer shall be excluded from this procedure in the following cases:
- Failure to produce all documentation drawn up in the manner and within the time limits referred to in Article 7(a) and in this Article
 - Lack of even one of the requirements specified in Article 3(a) of this call for proposals
 - Lack of production of an economic offer. (In case of discrepancy between the amounts expressed in figures and in letters, the amounts expressed in letters shall prevail).

ART. 8 – SIGNATURE OF THE CONTRACT AND METHOD OF PAYMENT

- a) The contract will be signed after all bidders are notified the results of the evaluation via e-mail PEC.
- b) Payments will be made upon completion of the assignment as detailed in Art.1, i.e. not later than 30 days upon acceptance of the relevant country report by CEI-ES.
- c) Payments will be made by bank transfer to the bank indicated by the successful bidder.
- d) The payment shall be deemed to compensate in full for all services, expenses and incidental expenses incurred in the implementation of the contract.

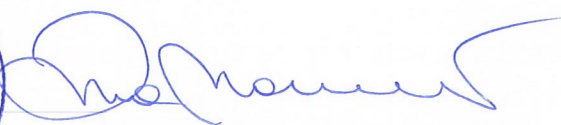
Art. 9 - RESPONSIBLE FOR THE PROCEDURE

The Head of Finance and Operations, Ms. Anna Marconato, is responsible for the proceedings.

Art. 10 - DATA PROCESSING

The data provided by the applicants will be processed exclusively for the purposes related to the completion of this procedure.

Best regards.



Head of Finance and Operations
Anna Marconato



Attachments:

Annex 1 - Application (and related declarations)

Annex 2 - Economic offer

For any additional information (questions) please contact Ms. Ana Sinkovic (Project Manager) sinkovic@cei.int,
tel: +39 040 7786 758.