

TOURBO

Boosting the transition pathway of MSMEs in tourism
with green and digital transformation

“Call for Expression of Interest to select TOURISM MSMEs for
Innovation Services awarding”



Foreword

Marche Region (Italy) is partner of TOURBO project financed by the European Commission through the INTERREG EUROPE Programme 2021-2027.

This Call falls within TOURBO project and it is targeted to MSMEs operating in the TOURISM sector of Marche regional territory willing to adopt GREEN and DIGITAL TRANSITION¹ methods and solutions within their business through the support of “Knowledge Providers”: expert consultants accredited in the TOURBO dedicated database.

This CALL issued by SVEM, Sviluppo Europa Marche S.r.l. - the Regional Development Agency of Marche Region implementing body for the TOURBO project.

Art. 1 – Introduction to TOURBO goals

The tourism sector is characterized by SMEs/micro-firms generally facing difficulties in accessing to innovation, digitalisation and sustainability due to their dimension combined with skills need and changes in new tourism demands. MSMEs have also scarce attitude to cooperate and internationalise and there is substantial gap between supporting schemes providers and valuable solutions for MSMEs due to the lack of substantive understanding of requests and mutual dialogue.

The TOURBO project, financed by the EU under the INTERREG EUROPE Cooperation Programme, contributes to the TWIN TRANSITION PATHWAY approach by promoting innovative ideas and practices to foster green and digital solutions for tourism MSMEs, aiming at creating a more responsive, smart and inclusive policy framework.

After an in-depth analysis of the tourism sector meant to trigger innovation in PPs territories starting from the state of the art: the TOURBO project promotes the implementation of pilot actions in two regions in Italy and Greece. The actions are aimed at providing a pool of TOURISM Companies based in Marche (Italy) and North Aegean Region (Greece) with a personalized plan (based on a sustainability diagnosis and smart&green scenarios) to improve MSMEs competitiveness through innovative solutions for environmental sustainability and digitisation.

A total of n. 5 tourism companies in Marche (Italy) will test the benefit of the collaborative & open innovation approach to boost their innovation capacity. More companies could be funded by SVEM according to eventual savings in the pilot action dedicated budget line.

¹ For a definition of Green and Digital Transition within the TOURBO project see Annex 1 – “Tourbo Glossary”

SVEM (Sviluppo Europa Marche S.r.l.) www.svemarche.eu is the Regional Development Agency of Marche Region - which is a partner of TOURBO Consortium and is the coordinating body of this pilot action and this call for Expression of Interest.

Art. 2 – Purpose of the present Call for EoI

SVEM is selecting n.5 companies (or more depending on eventual savings) based in Marche region, operating in the tourism sector, willing to boost their innovation capacity thanks to better sustainable and digitisation solutions.

The selected companies will benefit of an open innovation approach and will be accompanied by high specialized experts accredited in the TOURBO database of Knowledge Providers, in the identification and implementation of innovative solutions promoting the company environmental sustainability and digitalization.

Art. 3 – The goal of the service

Following the Expression of interest, among all the companies that will apply to the present Call, a number of 5 MSMEs will be shortlisted based on specific technical criteria (see art.6) and their propensity for innovation.

The shortlisted companies will benefit of a personalized consultancy aimed at identifying and introducing better sustainable and digitisation solutions into the company.

The service provided to the tourism companies will consist in helping companies to exploring potential of a breakthrough green innovation or to introducing sustainable and digitisation solutions.

The consultancy service is provided by a pool of sectorial experts (both individuals or public / private consultancy companies/institutions), that are shortlisted through a dedicated Call for Expression of Interest for KPs managed by SVEM in collaboration with ELORIS to carry out the innovation-transfer services.

A Three-Party contract will be signed between SVEM, the Expert and the Company for the definition of the consultancy service to be provided (see **Annex 5**).

Below is a non-exhaustive list of the types of consultancy that can be financed by this call, for the benefit of selected SMEs:

- Innovative tourism product design/development
- Innovative tourism service design/development
- Innovative tourism process design/development

- Tourism Business model generation
- Tourism New market/sector development
- Services tackling the EU key Tourism challenges
 - **Challenge 1: Reducing the seasonality of demand**
 - **Challenge 2: Addressing the impact of tourism transport**
 - **Challenge 3: Improving the quality of tourism jobs**
 - **Challenge 4: Maintaining and enhancing community quality of life, in the face of change**
 - **Challenge 5: Minimizing resource use and production of waste**
 - **Challenge 6: Conserving and giving value to natural and cultural heritage**
 - **Challenge 7: Making holidays available to all**
 - **Challenge 8: Using tourism as a tool in global sustainable development**

With the aim of identifying of a set of possible technology / organizational solutions that shall be customized according to the companies' peculiarities in the perspective of introducing innovation plans/innovation tourism products/services/design.

Here below a list of not eligible activities:

TOURBO project is not intended to support services which primarily involve:

- routine replacement and equipment using simple technologies;
- activities that would be undertaken in the normal course of business;
- up-skilling of individuals where there is negligible benefit to the innovation capability of the wider organization;
- activities that have been started before the submission of the applications;
- activities financed by a different National or European Program;
- activities not directly related with the purposes of this Call.
- activities obligatory by national regulations

Beside the basic format of the consultancy, the selected Expert can decide to introduce further approaches or analytic tools to target specific peculiarities and needs of the matching company and improve the overall quality of the service provided.

Art. 4 – Institutional regulation framework and Requirements for participation

The TOURBO Call for EoI is implemented under the conditions set by Regulation (EU) 2021/1059 on specific provisions for the European territorial cooperation goal (Interreg) supported by the European Regional Development Fund and external financing instruments.

Beneficiaries (MSMEs/start-ups) must fulfill the criteria defined by Commission Regulation (EU) 2023/2831 of 13 December 2023 on the application of Articles 107 and 108 of the Treaty on the Functioning of the European Union to *de minimis* aid. This Regulation sets the *de minimis* per undertaking granted over any period of three fiscal years, and thus considerably simplified the granting of small amounts of support.

Applicants to the present Call must fulfill the following criteria:

- Be a Micro, Small and Medium sized Enterprises (MSMEs) according to the definition and classification reported in Annex 4 of the Commission Regulation (EU) No 651/2014 1, or SMEs as defined in the rec. 2003/361 of the European Commission and Start – ups, having an independent legal status²;
- Be registered to the Chamber of Commerce under the commercial code referred to production / processing / commercialization within the tourism sector;
- Operating in at least one of the registered Business Activities listed in **Annex 3**;
- Have one registered operational office in Marche Region;

Art. 5 – Submission of the application

The interested MSMEs are invited to fill out the following documents:

- Annex 1 – Application Form (filled in English)
- Annex 2 – Applicant’s statement
- Annex 4 - Declaration on the previous aid received under the De Minimis Regulation
- A copy of the Chamber of Commerce Registration Document of the Applicant reporting NACE code proving applicant’s economic activity belonging to tourism sector (listed in Annex 3) – original language (IT)
- A copy of a valid ID document of the signatory person

The submission of candidatures must be sent via the Marche Region On-line Portal at <https://www.regione.marche.it/Entra-in-Regione/Marche-Turismo/Progetti-europei/Tourbo#Voucher-Tourbo-EN>

The submission must be sent **within the deadline of 15th January 2025 to tourbo@regione.marche.it following the instructions in the web page.**

Art. 6 – Selection and awarding criteria

Upon verification of the criteria referred to in art. 4, the first 5 eligible companies classified will have the right to benefit from the Service referred to in art. 3. The **criteria** that will be applied to shortlist the n.5 companies that will benefit of the services are:

² MSMEs are eligible beneficiaries, including "Associations that regularly exercise an economic activity considered as an enterprise" as stated in the European Commission Regulation 651/2014 - Annex 1 (art.1). These types of entities must comply as well with the eligibility need mentioned above (NACE codes and F&A Activity) and demonstrate the regular economic/commercial activity by means of dedicated administrative documents such as statute and balance sheets where consistent income budget shall correspond to services provided not included in the annual membership fee.

Eligibility criteria (mandatory)		
These criteria are self-certified by the companies in the application Annexes .		
Criteria (mandatory)	Yes	No
<ul style="list-style-type: none"> • The company fulfils all conditions set at Art. 4 – Institutional regulation framework and Requirements for participation: 		
<ul style="list-style-type: none"> - Be a Micro, Small and Medium sized Enterprises (MSMEs) according to the definition and classification reported in Annex 4 of the Commission Regulation (EU) No 651/2014 1, or SMEs as defined in the rec. 2003/361 of the European Commission and Start – ups, having an independent legal status; 		
<ul style="list-style-type: none"> - Be registered to the Chamber of Commerce under the commercial code referred to production / processing / commercialization within the tourism sector; 		
<ul style="list-style-type: none"> - Operating in at least one of the registered Business Activities listed in Annex 3; 		
<ul style="list-style-type: none"> - Have one registered operational office in Marche Region; 		

Awarding criteria			
These criteria are evaluated by the Selection Committee appointed by SVEM			
Criteria	Poor = 1 pt	Medium = 3 pt	Good = 5 pt
Quality of the project: the capacity of the proposed Service to foster the “twin transition” of tourism operators and to bring innovation to the beneficiary company			
Value for money: the added value that the proposed service will bring to the MSME compared to the cost			
Replicability of the idea and applicability of the idea to other tourism companies			
Feasibility of the idea: the capacity of the project to be implemented in time with the available resources			
Sustainability for the company: the capacity of the project-service to sustain its value throughout time			
Collaboration/Partnership: the level of cooperation between KP and MSME, local (1 point), national (3 points), international (5 points)			

The submitted applications are evaluated by a Selection Committee appointed by SVEM.

The members of the Selection committee must have no conflict of interest with applicants.

Applications not fulfilling the eligibility criteria will be rejected. In these cases, applicants will be informed by SVEM via registered e-mail (PEC).

Applications fulfilling the eligibility criteria will be evaluated by the Selection Committee following the awarding criteria listed above.

In case of equality of scores resulting from the evaluation, the proposals will be ranked according to their time of reception: with priority given to those received first.

Information on the results of the selection and the awarding process will be communicated via registered e-mail (PEC) to all applicants and published in SVEM Website and in the Marche Region Webpage dedicated to the TOURBO project.

The companies and Knowledge Providers awarded under this Call will be required to:

- Participate to B2B meetings organized upon mutual convenience;
- Share information and data related to the companies' own productive organization/process.
- Participate to international/national/local meetings organized in the framework of the TOURBO project. The participation costs will be reimbursed from the TOURBO project budget.
- Contribute to promotional contents (e.g. texts, audio, videos) and participate to events organised and implemented by the TOURBO project partner organizations, for the dissemination of the pilot action results.

Art. 7 - Matchmaking of company's need and Expert's know-how

The MSMEs will request to the Experts - inserted and accredited in the TOURBO Short List – to provide the Service, depending on the matchmaking between the innovation needs expressed by the MSMEs and the Expert competences and know-how.

A Three-Party contract will be signed between SVEM the MSME and the Expert.

The MSME shall appoint/choose the Expert **before** applying to the dedicated EoI for MSMEs within the deadline of 15th January 2025 - (CET) Brussels time, filling the relevant box in Annex 1 of the Call for Expression of Interest; this means that an agreement has been reached between the MSME and the Expert in advance.

Applicants and Experts must be entirely separate entities, with no financial or other ties. Specifically, MSMEs and selected Experts must not be owned by the same parent company, share governance or have common directors.

Applicants are required to declare any existing governance relationships between themselves and the selected Expert, including whether any of the Experts are subsidiaries or related bodies corporate; share common directors, officers or senior managers.

Art.8 Value of the Service

The maximum amount that can be awarded per MSME within this Call is 8.000,00 Euro. The amount is funded 100%, no co-financing scheme is foreseen. Each Expert involved who successfully provided the consultancy as described in the awarded project, will receive the final payment by SVEM for the Service provided after issuing a valid invoice - or equivalent document - of 8.000,00 Euro.

TOURBO project foresees a unique type of Service with a value of 8.000,00 Euro. Services of less than 8.000,00 Euro will not be eligible. If application concerns only part of a comprehensive project with a total spending forecast that exceeds 8.000,00 Euro, the activities to be financed by the TOURBO project should be part of a distinct sub project with a value of 8.000,00 Euro that should be clearly described in the application, for evaluation purposes.

The amount mentioned above includes VAT if the Expert selected by the MSME has its operative head office in the Country of the pilot partner (SVEM). VAT is zero – according to the national tax law- in the case the Expert selected by the MSME has its operative head office outside the Country of the pilot Partner involved (SVEM).

The invoice – or equivalent document - of the Expert is issued directly to SVEM and not to the MSME (a copy of the invoice can be sent by the partner to the MSME) following art. IV of the Three Party Contract: “After the complete and correct Request for Payment is submitted to the pilot partner and its acceptance by the latter is communicated to the Expert and the MSME Beneficiary, the Expert is obliged to issue the invoice directly to the pilot project partner (SVEM), making reference to the performed activities as described in detail in the project submitted and in the final report with reference to the “TOURBO Innovation Services awarding” by the MSME Beneficiary.

In case of need, the MSME shall be invited to participate to the TOURBO official Transnational project meetings. In this case, the costs of travel and accommodation for the participation to the events will be reimbursed by SVEM.

Art. 9 – Publicity and information

The present Call for EoI is published in the following Media:

Project website:

Institutional partner's website: <https://www.regione.marche.it/Entra-in-Regione/Marche-Turismo/Progetti-europei/Tourbo#Voucher-Tourbo-EN>

For any information please contact: SVEM, e-mail: tourbo@regione.marche.it

Art. 10 – Confidentiality and Privacy

All information exchanged are confidential, in line with the REGULATION (EU) 2016/679 OF THE EUROPEAN PARLIAMENT AND OF THE COUNCIL of 27 April 2016 on the protection of natural persons with regard to the processing of personal data and on the free movement of such data.

All information exchanged are used only for the purpose of the project.

The MSMEs applying and undersigning the Applicant's Declaration of Honour gives its permission to SVEM to process the data given only for management (including publishing of general information) and statistic purposes even through digital devices respecting the security and privacy within the law. In particular, data processing by TOURBO project Partners will be made in accordance with the provisions of Regulation (EU) 2016/679 and the subsequent transposing laws (jointly, the "GDPR"). The realization of the project implies processing of the following personal data: name of the organization, address, VAT number, telephone number, e-mail, web site, name of the legal representative of the organization, surname, position, telephone number, e-mail. During project's implementation personal data will be processed exclusively by persons authorized by project partners. As an interested party the applicant can require SVEM to exercise the rights described in the art. 15 of GDPR and in particular: access to relevant personal data rectification, integration, deletion, limitation of processing that concerns them or to oppose their processing. Pursuant to art. 17, paragraph 3, let. d), the right to cancellation does not exist for data which must be processed for the purposes of scientific research if the objective of the research itself cannot be obtained without them.

Art. 11 - Disclaimer

Interreg Europe Programme makes no representation, warranty or undertaking of any kind in relation to the accuracy or completeness of any Information.

Interreg Europe Programme will not be liable or responsible to any person in relation to any inaccuracy, error, omission or misleading statements contained in the Information.

Interreg Europe Programme will not be liable or responsible to any person in relation to any failure to inform any person of inaccuracy, error, omission or misleading statement contained in such Information of which it becomes aware after the date of release of that Information.

Interreg Europe Programme shall not be liable to any person for any damages, losses, costs, liabilities or expenses of any kind which it may suffer as a consequence of relying upon such Information.

Under no circumstances will Interreg Europe Programme be liable for any costs or expenses born by applicants in this process.

Art. 12 – Conflict of interest

Applicants must have no conflict of interest with TOURBO project Partners or with the members of the Selection Committee that may affect the potential performance of the innovation project.

Art. 13 - Call Calendar

Launch date	October 2024
Closing date	January 2025
Evaluation and contracting	January -February 2025
Implementation period	March 2025 - May 2025 (3 months)
Reporting and request of Payment	September 2025
Projects reports checks and Service payment	October 2025

Annexed to the present Call for EoI:

- Annex 1 – Application Form to be filled in by MSMEs to apply for the Innovation service
- Annex 2 – Applicant’s Statement to be filled in by MSMEs to apply for the Innovation service
- Annex 3 - Eligible MSMEs Business Activities to be checked by the applicant
- Annex 4 - Declaration by the MSMEs on the previous aid received under the De Minimis Regulation
- Annex 5 - Three Party Contract – SVEM-MSME-KP
- Annex 6 – Final Report and Request for Payment Form