



CALL FOR TENDERS' GUIDE

*Concession/Rental for Use Free of Charge
pursuant to Art. 11, par. 3 of Legislative Decree no. 106/2014*

June 2023

*Tendering procedures for the assignment of public properties for
concession/rental for use free of charge pursuant to Art. 11, par .3
of Legislative Decree no. 106/2014*

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WARNING

This Call for Tenders' Guide is an explanatory and support tool with which to guide bidders - who intend to participate in public procedures launched under the Valore Paese Italia project - in reading the tender documentation and, in particular, the Local Invitations (i.e. tenders).

Therefore, this Guide does not supplement or replace the tender documentation.

*In case of discrepancy between the indications contained in this document and what is reported in the Invitations to Tender - which, it should be remembered, constitute *lex specialis* rule - what is indicated in the Invitations and the relevant annexes prevails according to the provisions set forth in the same Invitations.*

For further complementary information and/or clarifications on the content of the tender documentation not contained in this Guide, please note that it is possible to contact the Tender Managers, exclusively in writing, in Italian and within the deadlines set by the procedures, at the e-mails indicated in the Local Invitations to Tender.

SECTION I: THE PROJECT

1. What is Valore Paese Italia (VPI)?

The Network Projects are complex, nation-wide initiatives for the renovation and conversion of State-owned investment properties with high cultural, identity and landscape value. These properties, owned by the State and other Bodies, shall be **economically, socially and culturally redeveloped** according to a series of **thematic networks** that combine together tourism, cultural heritage, environment and soft mobility.

The redevelopment initiatives revolve around a **specific theme** characterising the **network** (here meant as a network of **real estate assets, territories and actors**), which shall be promoted through a strong brand capable of making it easily recognizable. The Network Projects - Valore Paese Italia initiative began its activities starting from 2015 with the Lighthouses, Watchtowers and Coastal Buildings network, which at the time involved only State-owned properties; starting from 2017, the participation was extended also to other Bodies, with the inauguration of a new thematic network called Hikes and Itineraries. In 2020, all active networks - including the Dwellings one, which had been experimented sporadically ever since 2007 - were reunited underneath the single banner of Valore Paese Italia. Valore Paese Italia is a national programme promoted by the subscription of the institutional agreement of 17 December 2020 and of the subsequent operational agreement between the then Ministry of Cultural Heritage and Activities and of Tourism (now Ministry of Culture), the Italian Government Tourist Board (ENIT), the State Property Office and Difesa Servizi S.p.A.. Other institutional partners and the world of slow tourism and soft mobility participate in the programme. **The Networks** included in the Valore Paese Italia brand are as follows:

- Lighthouses, Watchtowers and Coastal Buildings
- Hikes and Itineraries
- Dwellings
- Forts and Fortifications (new)
- Villages and Inland Areas (new)
- Accessible Tourism (new)
- Third Sector Entities (*Enti del Terzo Settore* or ETS)

2. What are the objectives of the programme?

Valore Paese Italia aims at redeveloping the nation's public heritage, landscape and historical-artistic beauties and, with joint actions, intends to enhance the social-tourist-cultural offer through the design and creation of national circuits of excellence in support of the "Italian System", also linked to slow and sustainable mobility, railway tourism, the networks of lighthouses, watchtowers and coastal buildings, hikes and itineraries, dwellings, roadman's houses, hamlets, forts and fortifications, reserves and natural sites, along which to redevelop public real estate assets.

3. How are the properties awarded?

For the purpose of implementing the project, two different tools for the redevelopment of the assets were identified:

- **Concession/Rental for Use Free of Charge pursuant to Art. 11, par. 3** of Legislative Decree no. 83/2014, converted into Law no. 106/2014, for enterprises, cooperatives and associations, aimed at creating national networks of excellence and at promoting hiking trails, cycleways and motorbike tours; - subject of this Call for Tenders' Guide -
- Redevelopment Concession/Rental pursuant to Art. 3-bis of Legislative Decree no. 351/2001, converted into Law no. 410/2001, to be assigned to private operators capable of bearing significant investment costs for the redevelopment of the assets. - see the specific Call for Tenders' Guide -

It is specified that in the following sections of this Guide, the concept of **Concession/Rental for Use Free of Charge** will be analysed in depth.

4. What is the difference between concession and location?

The difference between concession and rental lies in the legal status of the properties. More specifically, assets of cultural interest pursuant to Legislative Decree no. 42/2004 shall be subject to concession, whereas the assets of no cultural interest shall be subject to rental.

5. For 2023 edition, what are the project's implementation methods?

For State-owned properties, the State Property Office shall initiate and manage the tender procedures on a local level with Invitations published by each Local Directorate for the assignment of the relevant public properties (that is, located in the reference territory) in Concession/Rental for Use Free of Charge pursuant to Art. 11, par. 3 of **Legislative Decree no. 83/2014** and in redevelopment concession/rental pursuant to **Art. 3-bis of Legislative Decree no. 351/2001**. The Invitations to Tender shall be made available on the State Property Office's website, in the "*Gare e Aste - Immobiliare*" section, as well as in the section dedicated to the *Valore Paese Italia* programme and to the Redevelopment Business Network.

For the buildings owned by other Bodies, the calls for concession/rental for use free of charge and for redevelopment concession/rental for the properties directly managed by them shall be made available in the relevant institutional websites.

6. Is the project partaken also by other owning Public Bodies?

Yes, other Public Bodies will partake in the programme, initiating tender procedures for the properties owned directly by them.

7. Where and how to find the information and the documentation related to the project.

È More information is provided in the institutional website of the State Property Office, in the section dedicated to the Redevelopment Business Network.

8. Where to find more information on the properties owned by other Public Bodies.

The Valore Paese Italia programme gathers the redevelopment initiatives promoted by Difesa Servizi S.p.A., ANAS and FS - in their quality of managers of public properties - for whose implementation different assignment processes can be identified, also in accordance with the specific tools made available to the Bodies that participate in tenders with their managed assets. The tender procedures and their deadlines are governed directly by the managing Body, therefore, for more information and clarifications, please contact directly the aforementioned Public Bodies.

For any buildings belonging to other Public Bodies (Municipalities, Regions, etc.) and included in the Valore Paese Italia programme, all tender procedures for their assignment and the relevant deadlines are governed directly by the Body and, therefore, for more information and clarifications, please contact directly the aforementioned Public Bodies.

SECTION II: GENERAL INFORMATION

1. What is a Concession/Rental for Use Free of Charge?

The assets shall be given in concession/rental pursuant to Art. 11, par. 3 of Legislative Decree no. 83/2014, converted into Law 106/2014, which provides for the assignment of public properties free of charge to enterprises, cooperatives and associations constituted mostly by individuals of up to 40 years of age for the purpose of their redevelopment, functional conversion and ordinary/extraordinary maintenance. According to the specific proprietorship of each asset, the assignment shall be made via rental contract of concession deed.

The concession/rental shall last for 9 years, starting from the subscription of the relevant deed/contract. It may be renewed for 9 more years pursuant to Art. 11, par. 3 of Legislative Decree no. 83/2014, taking into account the behaviour of the user and the material possibility of a more profitable redevelopment of the assets.

2. How many tendering procedures initiated by the Local Directorates of the State Property Office for concession/rental for use free of charge are there?

The Local Directorate(s) of the State Property Office that published calls for tenders for the concession/rental for use free of charge of State-owned properties are/is as follows:

- **Lombardy Directorate**

The Invitations to Tender shall be made available on the State Property Office's website, in the "*Gare e Aste - Immobiliare*" section, as well as in the section dedicated to the *Network Projects*.

3. What are the tendering documents?

Tendering documents are comprised of:

- Invitation to tender
 - Annex A - Information Pursuant to Art. 13 of Regulation (EU) 2016/679
 - Annex I - Assets' Description
 - Annex II - Applications
 - Annex III - Declaration of Knowledge of the Condition of the Real Estate
 - Annex IV - Personal Declaration of Certification
 - Annex V - Statement of Commitment
 - Annex VI - Project Proposal
 - Annex X - Outline of Concession Deed (for assets under concession)
- Annex VIII - Outline of Rental Deed (for assets under rental / use Annex VII in the event of simple rental)
- *Information Memorandum* with attachments (such as Certificate of Town-Planning Use Class, signed Memorandum of Understanding, outcome of cultural interest assessment, any relevant concession authorisation).

4. What is the *Information Memorandum*?

È It is a tender document which provides, for each property subject to the concession/rental call, an information framework and a general overview of the reference territorial and regulatory context, useful for the preparation of the Project Proposal to be submitted for participation to the tender, with particular reference to the new functions and the methods of intervention permitted and always in compliance with the instruments of historical-artistic and environmental protection and of urban and territorial planning in force.

5. What happens in the event of discrepancy between the tender documents? The following order of precedence is observed:

1. Invitation to Tender;
 - Concession Deed Outline (Annex VII) (for assets under concession)/Rental Deed Outline (Annex VIII); (for assets under rental / use Annex VII in the event of simple rental)
2. *Information Memorandum*.

6. What type of assets are included in the invitations to tender issued by the State Property Office?

Outlined below are the lots (single assets) subject to concession/rental for use free of charge, divided per each regional call for tenders published on the State Property Office website:

Invitation	Tender Procedure (Local Directorate)	Single lot /no.	Name of the Property	Region	Municipality Province	TENDER MANAGER	Inspection Manager
1	LOMBARDY	SINGLE	FORMER NATIONAL SHOOTING RANGE	LOMBARDY	PIAZZA BREMBANA (BERGAMO)	MANOLA DRAGONETTI	MATTEO SCALFI - BARBARA MARCOLINI

7. Which assets will be destined for concession for use free of charge and which ones for rental or use free of charge??

Invitation	Tender Procedure (Local Directorate)	Single lot /no.	Name of the Property	Region/ Municipality	Municipality Province	Concession/Rental
1	LOMBARDY	SINGLE	FORMER NATIONAL SHOOTING RANGE	LOMBARDY	PIAZZA BREMBANA (BERGAMO)	Concession

8. Where to find information on the properties.

On the State Property Office website, for each lot, it is possible to access, among the tender documents, the Annex I - *Asset's Technical Description* and the *Information Memorandum*.

9. Is it possible to ask for further additional information and/or explanations on the content of the documents to the Tender Manager?

Yes, any requests for additional information and/or clarifications on the content of the documentation relating to the tender procedures must be sent, exclusively in writing and in Italian, to the e-mail addresses of the persons in charge of the procedure indicated in the regional notices and listed below:

Tender Procedure	TENDER MANAGER	E-MAIL
LOMBARDY Local Directorate	MANOLA DRAGONETTI	manola.dragonetti@agenziademanio.it

10. What are the deadlines for submitting any eventual request to the Tender Manager?

Any eventual request for further information and/or clarifications on the contents of the documentation must be submitted and received without delay within **13 November 2023**.

11. What is the Tender Manager's deadline for answering any eventual request?

By **20 November 2023** the Tender Manager shall answer via e-mail all questions made.

SECTION III: CHARACTERISTICS OF THE CALLS FOR CONCESSION/RENTAL FOR USE FREE OF CHARGE

1. For the purpose of participating in the procedure, is it necessary to indicate a specific asset?

The submission of the application for participation in the tender procedure must refer to one or more specific assets (lot).

2. Are there any limitations to the participation to calls for tenders?

No, applicants may even participate in all active tender procedures.

3. For how many properties, in the context of the same tendering procedure, can applicants lodge their application to tender? In this edition, the lot is single. Nevertheless, there are no limits for the submission of applications to tender; therefore, each applicant can submit as many proposals as the total lots of the call for tenders.

By way of example, if a bidder is interested in the two properties/lots relating to the tender notice published by the Lombardy Local Directorate, he/she must submit an application for participating in the territorial tender procedure accompanied, for each property/lot, by a project proposal and an economic-timeline bid.

4. In the event of multiple participations within the same call, how should the tender be prepared?

In the event of multiple participations within the same call, the bidder must submit a single folder containing, under penalty of exclusion:

- an ENVELOPE called "A - *Administrative Documentation*";
- as many ENVELOPES called "B - *Project Proposal - Lot...*" (specifying the lot to which the bid pertains) as the lots for which the applicants wished to make a bid (e.g. if an applicant participates in two lots, two distinct envelopes B must be inserted, one containing the *Project Proposal* relating to lot 1 and the other relating to lot 2);

5. When the properties are subject to invitations to tender published by different Local Directorates, is it possible to lodge a single application accompanied by the tender for each single property?

No, each Local Directorate manages the public procedure for the properties falling within their area of competence; therefore, if the properties constitute lots relating to tender notices published by different Local Directorates, as many applications for participation must be submitted - accompanied by the relative bids - as there are awarding Local Directorates.

By way of example, should a bidder be interested in three properties, two in the Lombardy Region and one in the Calabria Region, he/she shall submit:

- An application for the tender procedure called by Lombardy Directorate accompanied, for each asset, by the relevant *Project Proposals*;
- An application for the tender procedure called by Calabria Directorate accompanied, for each asset, by the relevant *Project Proposals*.

6. Can applicants request a meeting for further clarifications?

No, as indicated in the Invitation to Tender, it is only possible to request further information on the tender by writing in Italian and via e-mail to the Tender Manager (see contacts on Invitation to Tender) within **13 November 2023**.

By **20 November 2023** the Tender Manager shall answer via e-mail all questions made.

7. Is it possible to inspect the various properties?

Yes, it is possible to book an inspection. It is also noted that for the purpose of participating in the procedure, it is mandatory to either:

- Carry out an inspection of the relevant property; *or*
- Submitting a declaration of knowledge of the condition of the real estate.

8. In the event of an asset in a bad/average maintenance state, is it possible to inspect it anyway?

Yes, the inspection methods and timing are commensurate with the state of conservation of the property.

In any case, those interested in the inspection are required to use protective devices and to sign a declaration of indemnification to the State Property Office, releasing it from civil and criminal liabilities and for any damage that the participant may suffer while carrying out the inspection.

9. How to book an inspection.

It is possible to book the inspection(s) by contacting the person indicated for each Local Directorate- where different from the Tender Manager- by means of a written request, in Italian, which must be sent by e-mail to the e-mail address indicated in the Invitation to Tender. In the inspection request, the potential bidder must specify

- by indicating the lot number(s) - the asset(s) he/she intends to visit, as well as the names, personal details and telephone numbers of the people who intend to participate in the inspection.

10. What are the deadlines for booking one or more inspections?

Inspections' requests may be submitted starting from and until the dates and in accordance with the provisions set forth in the Invitation to Tender.

11. What are the deadlines for carrying out one or more inspections?

Inspections may be carried out starting from and until the dates and in accordance with the provisions set forth in the Invitation to Tender.

12. What is the Inspection Certificate?

The Inspection Certificate is a document issued to the person participating in an inspection by the relevant Local Directorate following the inspection of one or more properties. A copy of the Certificate, duly signed by the participant, shall be stored with the relevant Local Directorate. For the purpose of participating in the tender, the document must be submitted by the bidder, together with all other necessary documents.

13. If the inspection has not been carried out within the set deadline, is participation to the tender precluded?

To participate in the procedure, it is mandatory to certify knowledge of the condition of the assets.

This certification can be presented in two ways, i.e. inserting alternatively in Envelope A:

- an Inspection Certificate issued following a visit to the property, agreed with the contact person of the locally relevant State Property Office;
- a Declaration, to be produced by completing the Annex III form, which certifies knowledge of the condition of the assets.

The knowledge of the place, therefore, is left to the participant and can be understood both as a personal knowledge of the property and as having read, analysed and accepted the documentation made available.

Should it be impossible to carry out an inspection with the Representatives of the State Property Office, therefore, it is possible to certify knowledge of the assets by filling out Annex III and inserting it in the Envelope A.

14. Is it possible to request the supplementary technical documentation regarding the properties held for tender?

All the tender documentation, together with the available technical documentation, can be found on the Office's institutional website, via the "Gare e Aste/Immobiliare" path and is also available for viewing at the competent Local Directorate.

In particular, the *Information Memorandum* reports the technical insights on each individual asset (LOT) and on the reference context, the constraint situation (constraints, Ministry of Culture authorizations, etc.) and the administrative procedure, as well as the new possible uses and the possibilities offered on a territorial scale to support the initiative, it being understood that the recovery of the asset and the management of the new business are the responsibility of whoever is awarded the property.

15. Are social activities envisaged as a new function of cultural and social animation of the itineraries as a service for local communities?

Yes, in consideration of the indications of the territorial, urban-planning and protection instruments in force, it will be possible to envisage a range of new functions consistent with the principles of the project, from which, therefore, the establishment of functions of a social nature will not be excluded.

The project also focuses on the development of specialist complementary services for users with specific needs (e.g. children, the elderly, the disabled, etc.) and personal services.

16. By way of example, what could be the new functions to establish in the awarded properties?

With a view to fostering the knowledge, enhancement and promotion of territories and local products, as well as promoting the social and cultural sectors in general, but also sustainable tourism and soft mobility, in consideration of the indications set forth in the territorial, urban-planning instruments and existing safeguards, it will be possible to envisage a range of new functions in line with the principles of the programme, e.g. hospitality and cultural activities (art and entertainment, teaching and training, etc.); socio-recreational activities (leisure, recreational activities, etc.); sports (diving, sailing, fishing, cycling, trekking, yoga, etc.); events (meetings, fashion, festivals, concerts, weddings, etc.); services for the slow traveller (walker, cyclist, pilgrim), care and well-being services (physiotherapy, wellness, meditation, rehabilitation), services for social categories with specific needs (children, the elderly and activities for the disabled) research and didactic activities (study centre, observation of flora, fauna and stars, etc.); catering and food and wine; discovery of the territory (land and sea excursions, guided tours, involvement of guests in activities and projects to safeguard the natural and coastal habitat, promote the architectural, cultural, landscape, material and immaterial, local heritage, etc.).

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SECTION IV: ELIGIBLE APPLICANTS

1. Who can participate to the call for the concession/rental of a property for use free of charge?

Only legal persons - such as enterprises, cooperatives and associations - with the following characteristics can participate in the procedure for awarding the concession/rental for use free of charge:

- To be incorporated at the moment of the tenders' lodging. For the purpose of ensuring the maximum participation possible, the establishment date of the legal person shall be assessed with regard to the moment in which the tender is lodged. This means that, for State-owned properties, it was decided:
 - ✓ To exclude the legal persons *still to be incorporated*;
 - ✓ To have no minimum years of incorporation;
 - ✓ To not request that the incorporation date of the legal person precedes that of the publication of the Call;
- To be incorporated mostly by individuals of up to 40 years of age. For the purpose of ensuring the maximum participation possible, the prevalence requirement must be met at the moment of the tender's lodging; moreover, and again for the purpose of ensuring the maximum participation, of identifying an identical term for all participants and of ensuring equal treatment, the age requirement (not to have reached 41 years of age) shall be assessed with regard to the moment of the call publication;
- That individual or group participation is allowed.

It should be noted that:

- For the same lot (single asset), it is forbidden for bidders to participate in more than one group;
- For the same lot (single asset) and in the case of participation as an individual, it is forbidden for bidders to participate also in associated form;
- For different lots (different assets), bidders can participate both individually and in different groupings.

All associations, recognized and not, can participate in the tender, without limitations and/or constraints related to the social purpose pursued by them

2. By way of example, which subjects, ascribable to the category of enterprises, cooperatives and associations, can participate to the call for the assignment of property in concession/rental for use free of charge?

By way of example, but not limited to, the participation of the following is allowed:

- Enterprises: sole proprietorships, general partnerships, limited liability companies, simplified limited liability companies;
- Cooperatives: production and work cooperatives, social cooperatives, consumer cooperatives, agricultural work cooperatives, agricultural and livestock supply cooperatives, fishing cooperatives;
- Associations: social promotion associations, amateur sports associations, religious associations, non-profit associations, etc.

3. Can natural persons participate to the call for the concession/rental for use free of charge of a property?

No.

4. What does "individuals up to 40 years of age" mean?

Individuals up to forty years of age are persons who have not reached the age of 41 on the date of publication of the call.

The age requirement is assessed - alternatively - both with reference to the management body (e.g. Board of Directors or Board/Directive Committee), and to the social or corporate structure/shareholders and is defined, in both cases, equal to at least 50% + 1.

5. Must the requirement of the prevalence of individuals up to 40 years of age be met at the time of the publication of the call?

No, it is sufficient that this requirement is met on the date of lodging of the tender.

6. Is the call for the assignment of properties in concession/rental for use free of charge open also to enterprises, cooperatives and associations composed mostly by individuals up to 40 years of age without a legal address in Italy? Can the tender documents be submitted in a different language than Italian?

Enterprises, cooperatives and associations composed mostly by individuals up to 40 years of age without a legal address in Italy can participate too in the Call.

It should be noted that, in any case, the application form and all attachments must be written in Italian and the administrative documents must be accompanied by a sworn translation into Italian.

It is specified that only those individuals residing for legal purposes in the Autonomous Province of Bolzano can lodge their tender documents in German.

SECTION V TERMS AND CONDITIONS FOR LODGING A TENDER

1. How should tenders be lodged?

Tenders must be lodged (by mail or by hand delivery) with the address indicated in the Invitation to Tender within the peremptory deadline of **27 November 2023 at 12:00**, presenting them in a sealed envelope in any way that prevents them from being opened without leaving obvious tampering.

Two separate sealed envelopes must be inserted inside the envelope, under penalty of exclusion:

- An ENVELOPE called "*A - Administrative Documentation*";
- Depending on the number of relevant lots, as many ENVELOPES called "*B - Project Proposal - Lot...*" (specifying the lot for which the bid is being lodged);

All envelopes must be sealed on the closing flaps and bear, in addition to the aforementioned wordings, also the sender's header.

Envelopes received after the indicated deadline will be considered as not received, therefore they will not be opened and can be returned to the sender upon written request.

Tenders sent by e-mail will not be considered.

2. Can the tender documentation be drafted in a foreign language?

No, providing a bid in a foreign language is not sufficient for the purposes of the application. Bidders must present:

- For the documents referred to in ENVELOPE A, a sworn translation in Italian;
- For all other documents, a simple translation in Italian, it being understood that, even in this case, the Commission will only take into account what is represented in the translation itself.

It is also noted that only those individuals residing for legal purposes in the Autonomous Province of Bolzano can lodge their tender documents in German.

3. What should Envelope A contain?

ENVELOPE A - "ADMINISTRATIVE DOCUMENTATION" must contain the following deeds and documents, to be submitted in the manner described in the Invitation to Tender:

- ✓ The application to participate in the procedure, drawn up with € 16.00 stamp duty (**Annex II**);
- ✓ The certificate of inspection issued during the inspection (one for each lot selected) or, alternatively, a declaration certifying full knowledge of the state of the site (**Annex III**);
- ✓ A Personal Declaration of Certification (**Annex IV**) in which the bidder declares:
 - Not to fall in the causes of exclusion referred to in Art. 80 of Legislative Decree no. 50/2016;
 - That the management body or the social or corporate structure/shareholders is made up mainly (50%+1) of persons who have not completed the 41st year of age on the date of publication of the Call;
 - To accept the content of the tender documents, including Annex A - Privacy Information, to be inserted in the Envelope A duly signed.
- ✓ Declaration of commitment to make use, for the execution of the interventions, exclusively of companies qualified to carry out the interventions, in line with the current regulations on Public Works (**Annex V**);
- ✓ The provisional deposit, equal to € 2,000 (two thousand Euro).

4. Are there any specific formalities for the lodging of Envelope A by a temporary joint-venture?

Yes, in the Invitation to Tender, further formalities are envisaged with reference to the procedures for lodging applications by temporary joint-ventures; therefore, please refer to the detailed reading of the Invitation to Tender.

5. What is the purpose of including a provisional deposit?

The provisional deposit is placed as a guarantee of the correct participation in the tender and also offsets the potential failure to sign the concession deed/rental agreement by the successful bidder; the deposit shall be released as soon as the deed/agreement is signed. It should be noted that this deposit is single regardless of the number of lots for which a bidder may participate. In the event of failure to sign the deed of concession/rental agreement for reasons not attributable

to the granting/lessor Body, the deposit will be enforced in its entirety even if the bidder has participated in more than one lot; in this case, the bidder will have the obligation to reconstitute it within the term that will be assigned to him/her for this purpose. For State-owned properties, the deposit amounts to € 2,000.00.

6. How should the provisional deposit be given?

The provisional deposit can be given, at the bidder's choice, by means of a bank guarantee, an insurance policy, or by bank transfer. For further details, please refer to the Invitation to Tender.

7. With regard to deposits, is a bank guarantee issued by a foreign bank valid?

Yes.

8. Is it possible to establish a provisional deposit with a banker's draft?

No, bidders cannot establish a provisional deposit with a banker's draft.

9. Will the provisional security be released upon award of the property?

Yes, the provisional deposit submitted by the successful bidder shall be released and replaced by the definitive deposit as soon as the deed/agreement is signed.

10. Will the provisional deposit be released if the property is not awarded?

Yes, at the time of the award, the granting/lessor body will release the entire amount of the provisional deposit presented by the unsuccessful bidders.

11. What should Envelope B contain?

In Envelope B "*Project Proposal - Lot...*", the format set forth in Annex VI must be used, which must be completed in the manner described in the Invitation to Tender and duly signed, under penalty of exclusion.

The format is divided into two:

A) PREAMBLES

1. Design Intentions
2. Compliance with Current Instruments

B) TECHNICAL REPORT

1. Redevelopment and Conversion Hypotheses
2. Tourist Opportunity
3. Environmental Sustainability and Energy Efficiency

A score must be assigned to each assessment element of the project proposal.

Participants are entitled to attach guidance materials accompanying the Project Proposal (Framework, New Uses, Interventions, Vision), to be presented according to the specifications indicated in Annex VI.

Failure to complete some fields in part B) of Annex VI, including failure to submit guidance materials, will affect the score attributed to the relevant assessment element of the Project Proposal, but will not be a cause for exclusion. It is therefore advisable to provide for the completion of all the fields of Annex VI and the presentation of the guidance materials.

12. What is the final deadline for lodging a tender?

To participate in the procedure it is necessary to send the sealed envelope by the peremptory deadline of **27 November 2023 at 12:00**.

13. What are the grounds for exclusion provided for in the call?

The grounds for exclusion provided for in the call are listed below:

As a general rule

- Failure to include ENVELOPES A and B in the envelope and, in the event of participation in multiple lots, failure to include as many B envelopes as there are participation lots, as better specified in the Invitation to Tender.

With regard to ENVELOPE A

- Failure to submit, within the pre-emptory deadline assigned, deeds and documents requested by the State Property Office for clarification/integration;

With regard to ENVELOPE B

- Failure to include in ENVELOPE B - "Project Proposal - Lot..." Annex VI;
- Failure to sign Annex VI;
- Inconsistency of the *Project Proposal* with the addresses and guidelines of the Network Projects - Valore Paese Italia.

In the event of a single bidder

The "under penalty of exclusion" clauses provided for in the Invitation to Tender will not apply (and, in relation to the deficiencies found, a request for integration will be forwarded) with the exception of the following cases, in which **the exclusion of the bidder shall be carried out anyway**:

- Absolute absence of Annex VI;
- Inconsistency of the *Project Proposal* with the addresses and guidelines of the project.

14. For the lodging of the *Project Proposal*, is the relevant attachment available in digital version? Should it be filled out digitally?

Yes, Annex VI is published in an editable format to facilitate their digital compilation in compliance with the provisions contained in the Invitation to Tender.

15. Are the 1500 characters required as maximum limit for the compilation of various items of the *Project Proposal* (Annex VI) to be understood as including or excluding spaces?

The required characters limitation set forth for the various items to be filled out in Annex VI are to be understood as including spaces.

16. How should the environmental sustainability and energy efficiency issues be considered with regard to the constraints that may exist for properties of cultural interest?

Each bidder is called, with respect to the property for which he/she participates in the tender procedure, to propose the solution he/she deems most suitable in compliance with the environmental constraints and the existing territorial and urban-planning instruments. The project idea presented must focus on the aspects indicated in the Invitation to Tender, which include environmental sustainability and energy efficiency.

As indicated in the Invitations, for all the assets subject to tender, all the works are by law subject to the opinion of the competent administrations in the field of protection of cultural assets and to any provisions eventually issued so that the proposed redevelopment intervention can guarantee the maximum protection and safeguarding of valuable properties.

Indeed, in the final and/or executive architectural design phase following the award, the winning proposal must be submitted for the approval of the competent Bodies in building and protection matters, and the choices relating to the interventions must be detailed and supported by appropriate analyses and technical documents (e.g. characters study, degradation analysis, details of construction techniques and materials, of recovery interventions on surfaces and structures, of distribution and plant engineering solutions, environmental impact study, etc.).

The projects submitted to the attention of the Authorities and Administrations competent in the field of territorial and urban planning and protection must in any case maintain characteristics of full compliance with what is proposed in the project.

However, the possibility of a preliminary confrontation between the successful bidder and the competent Administrations responsible for the current protection of territorial and urban planning is not excluded, so that it can be verified whether the project thus developed is to be considered, in advance, compatible with the preservation of the asset.

17. Is it necessary for the project designer appointed by the applicant to participate in the call for tenders?

No, resorting to a designer for the drafting of the *Project Proposal* is a faculty of the competitor, who, in any case, is required to sign the *Project Proposal*.

19. Must the successful bidder ensure the redevelopment and conversion of the asset? Are there any forms of economic and financial support available for the initiative?

The redevelopment of the asset and the management of the new business are the responsibility of the person who will win the property. If the possibility arises of also networking the forms of support for redevelopment projects (which can be activated under the programming of the European structural funds 2021-2027, as well as on the national resources of the Development and Cohesion Fund and on the European instrument NextGenerationEU with the correlated National Recovery and Resilience Plan, made available by the various Regions and by the public and private bodies that support and promote the project) it should be noted that the award of the building or buildings does not guarantee the positive outcome of the preliminary funding.

SECTION VI: ASSESSING THE BIDS

1. How are the bids assessed?

The concession/rental will be awarded to the bidder who shall lodge the best Project Proposal as assessed on the basis of the elements indicated in the table below.

ASSESSMENT ELEMENTS			REFERENCE	WEIGHTING FACTORS	SCORE
QUALITATIVE ELEMENTS	1)	REDEVELOPMENT AND CONVERSION HYPOTHESES	Project Proposal	P1=40	100
	2)	TOURIST OPPORTUNITY	Project Proposal	P2=30	
	3)	ENVIRONMENTAL SUSTAINABILITY AND ENERGY EFFICIENCY	Project Proposal	P3=30	

2. What does "redevelopment and conversion hypotheses" mean?

Description of the redevelopment and conversion hypotheses that the bidder intends to develop for the redevelopment of the asset. The proposal must be in line with the general principles of the project and with the reference context and represent the new functions (tourist reception associated with social, recreational, cultural, sports activities, as well as with the discovery of the territory and the promotion of local products) and the methods of intervention envisaged, depending on the nature of the asset, the presence or absence of a restriction and the degree of protection. The specific actions that the participants intend to undertake for the purpose of protecting and conserving the historical, artistic, identity and authenticity of the property will also be assessed, as well as for the purpose of guaranteeing integration with the territorial, environmental, landscape system and with the history, the culture, the local identity and the socio-economic fabric.

3. What does "tourist opportunity" mean?

It concerns the activity that is intended to be developed for the conversion of the property. The proposal will be assessed in terms of tourist opportunity, thus evaluating both the economic and/or social benefit for the territory involved, and the benefits for the development of Sustainable Tourism. The specific actions that the participants intend to undertake for the purpose of enhancing the reference itinerary shall also be assessed. The score will also be awarded with reference to the following aspects: public usability; networking; seasonal adjustment of tourist flows and local development.

4. What does "environmental sustainability and energy efficiency" mean?

Description of the elements characterizing the proposal according to the principles of environmental sustainability and energy efficiency, as well as the specific "green friendly" actions that the bidder intends to implement in terms of redevelopment and protection of the environment, also for the benefit of future generations, and improvement of the energy performance of the asset, with reference to the "Guidelines for the Improvement of Energy Efficiency in the Cultural Heritage" (Decree of the General Director of the Republic no. 701 of 20 August 2013) in the case of restricted assets. The score will also be awarded by taking into account the following aspects: use of bio-eco-compatible materials, bio-climatic techniques and devices, the implementation of sustainable construction site's management, the solutions in favour of soft mobility and the improvement of the building's energy performance and the use of low-consumption devices.

5. What does "green building" mean?

Green buildings entail a complex of construction techniques, usually traditional, aimed at realizing the principles of green architecture and environmental sustainability, i.e. guaranteeing the needs of ecosystemic living, in a broad and holistic sense. Green building techniques include the choices of non-harmful and ecological natural materials, free of potential indoor pollution, as well as the technological choices that reduce energy consumption, do not involve the use of additional energy (passive devices) and that safeguard the environment and the well-being of users.

6. What does "sustainable construction site's management" mean?

All those measures aimed at reducing the environmental impact of the construction site, and which in particular may concern noise and atmospheric pollution, as well as the management of waste and resulting materials, all fall within the term "Sustainable construction site's management". Among these solutions, the use of dry technologies for constructions can also be counted, which reduce wet construction site waste, as well as pollutants dispersed into the atmosphere at the end of their life.

7. If a property does not have any installation, is it still necessary to produce the Energy Performance Certificate (APE) before the construction work?

No, in that case it will not be necessary to produce the APE before the construction work, but only the one with the forecast of the energy performance after the construction is done. The assessment will be made, by convention, by starting with class G.

8. What does "architecturally-integrated renewable sources" mean?

All the technological solutions that make it possible to harmonize the elements that make up the system (e.g. photovoltaic panels) with the surfaces on which they are installed (e.g. a pitched roof), minimizing their visibility or making them a sign of recognition of the project (e.g. a micro wind turbine that becomes a landmark), are hereby considered to be "architecturally-integrated renewable sources".

9. What is the scoring method for the project proposed?

The scores are attributed on the basis of the compensatory aggregation method, applying the formula shown in the call for tenders.

In particular, each member of the Commission attributes - on the basis of the table contained in the Invitation to Tender - a coefficient, variable between zero and one, to each assessment element.

Subsequently, the averages of the coefficients assigned by the commissioners are calculated and transformed into definitive coefficients, bringing the highest average back to one and proportioning the provisional averages previously calculated to this maximum average. Then, each definitive coefficient is multiplied by the relative weighting factor, thus attributing a score to each assessment element.

Finally, all the scores attributed to the assessment elements in reference to each bidder are added up.

SECTION VII: IDENTIFYING THE CONTRACTOR

1. What happens after the deadline for the tenders' lodging?

Once all the bids have been received within the prescribed times, on the day and at the times indicated in the Invitation to Tender, a specially constituted Tender Commission will open the envelopes in a public session, examining and verifying the documentation contained in Envelope A, without prejudice to the envisaged possibility of requesting clarifications/integrations.

The same Commission will proceed, in public session, with the opening of the admitted bidders' Envelope B, in order to verify the presence and completeness of the relative content, without prejudice to the envisaged possibility of requesting the signing of the Guidance Materials.

Subsequently, in a private session, the Commission will examine the projects, it being understood that those of any bidders who are recipients of the aforementioned request for integration will be examined only after the definition of the relative position. First of all, the coherence of the Project Proposal with the addresses and guidelines of the Network Projects - Valore Paese Italia project referred to and illustrated in the Information Memorandum will be verified, under penalty of exclusion. Subsequently, the Commission will proceed to assign the scores, according to what is indicated in the Invitation to Tender, to the bids that have passed the aforementioned scrutiny.

Once the scoring has been completed, the Commission will then proceed, in public session, to announce any exclusions from the bids, to read the scores awarded and to identify the best bid.

2. What happens when two or more bidders obtain the same scores?

In the event of an ex aequo, the Commission will proceed, in public session, to identify the best bid by drawing lots.

3. What happens if only one bidder lodges a tender?

In the event of a single bidder, no score will be assigned to the *Project Proposal*, whose consistency and suitability with the principles of the initiative will in any case be verified.

In the case of a single bidder, the "under penalty of exclusion" clauses provided for in the Invitation to Tender will not apply (and, in relation to the deficiencies found, a request for integration will be forwarded) with the exception of the following cases, in which **the exclusion of the bidder will be carried out anyway**:

- Absolute absence of Annex VI;
- Inconsistency of the *Project Proposal* with the addresses and guidelines of the project.

4. How are the dates of the public sessions communicated?

The dates of non-consecutive public sessions are published on the State Property Office's institutional website.

The bidder will be able to attend the public sessions directly or through a delegate with a proxy.

5. Starting from the deadline for lodging tenders, what timeframes can be assumed for the selection of the concessionaire/lessee?

The Commission shall begin working once the tender is closed and the duration of its assessments will depend on the number of bids collected and their complexity.

As a rule, the assessment is estimated to take at least two to three months.

For the purpose of the award, the verifications required by law will also be carried out, which are expected to last approximately two months.

6. For the purpose of subscribing the deed/agreement, are there any requirements for the successful bidder who does not have registered office in Italy?

Yes, the successful bidder, if having its registered office in a country other than Italy, will have to transmit to the competent Local Directorate of the State Property Office the Italian tax code assigned at the request of the interested party by the Italian Revenue Agency for the fulfilment of fiscally relevant deeds in the territory of the Italian Republic.

SECTION VIII: ELEMENTS OF THE CONCESSION/RENTAL RELATION

1. What are the essential elements of the concession/rental relation?

Property redevelopment works - the contractor undertakes to carry out the works within the term of 36 months from the signing of the concession deed/rental agreement, without prejudice to the possibility of any extensions of the same, as well as to provide the State Property Office with the documentation certifying the completion of the works and the necessary certifications, including, by way of example, the certification relating to the usability of the building and the technical data sheet of the materials used and the work performed. The Concessionaire must also provide the technical-administrative documentation relating to the cadastral update.

Definitive deposit - in order to guarantee all the charges deriving from the concession, including the correct execution of the works and the payment of the fee, the contractor must present a definitive deposit of € 18,000; the deposit must be unitary and have a validity equal to the entire duration of the concession/rental and will be released in an amount equal to 20% after the term of 36 months referred to in the previous point has elapsed.

Gratuity of the concession/rental - Art. 11, par. 3 of Legislative Decree no. 83/2014 does not provide for the payment of any concession/rental fee.

Insurance policy(s) - For State-owned properties, the Concessionaire/Lessee, before commencing the works, must sign, at his/her own expense and under penalty of forfeiture, an adequate insurance policy(s) with a leading insurance company, to be sent to the State Property Office, to cover all the following risks:

- Before and during the execution of the Works, the Third Party Liability (TPL, or *Responsabilità Civile verso Terzi - RCT*) to cover damage to persons and damage to things, the Employer's Civil Liability (or *Responsabilità Civile verso Prestatori d'Opera - RCO*) and the total or partial loss - including fire, lightning, explosion and other ancillary risks – of the Property subject to concession, with a limit not lower than the value of the non-redeveloped Property;
- Once the Works have been completed, before starting the activities envisaged in the *Project Proposal* and for the entire residual duration of the concession, the Third Party Liability (TPL, or *Responsabilità Civile verso Terzi - RCT*) to cover damage to persons and damage to things, the Employer's Civil Liability (or *Responsabilità Civile verso Prestatori d'Opera - RCO*) and the total or partial loss - including fire, lightning, explosion and other ancillary risks – of the Property subject to concession, with a limit not lower than the value of the non-redeveloped Property. This limit will be increased by the Concessionaire, every 5 years, by a percentage equal to the sum of the ISTAT consumer price indices for each of the past years.

Plaque - For the purpose of promoting and encouraging the establishment of the Valore Paese Italia network and ensure its systematic development, among the concessionaire/lessee's commitments, the obligation to create and affix the programme's identification plaque has also been foreseen, according to the provisions indicated by the State Property Office and according to the provisions of law in force.

Renewal - Notwithstanding the prohibition of automatic renewal of the concession/rental, the renewal for 9 further years may be assessed pursuant to Art. 11, par. 3 of Legislative Decree no. 83/2014, taking into account the behaviour of the user and the material possibility of a more profitable redevelopment of the assets. The concessionaire/lessee can formalize a specific renewal request to the Local Directorate of the competent State Property Office, no later than 8 months before the aforementioned deadline and in any case not before 7 years have passed from the signing of the concession/rental itself.

2. With regard to deposits, is a bank guarantee issued by a foreign bank valid?

Yes.

3. How should the final deposit be given?

The definitive deposit may be given by means of a bank guarantee or insurance policy issued by banking or insurance companies that meet the requirements of Art. 93, par. 3 of Legislative Decree no. 50/2016, and must expressly provide for:

- The waiver of the benefit of preventive enforcement of the principal debtor pursuant to Art. 1944 of the Italian Civil Code;
- The waiver of the exception pursuant to Art. 1957, par. 2 of the Italian Civil Code;
- The relative operational capability within 15 days, upon simple written request from the Office.

4. With regard to the concession/rental for use free of charge, is the sub-concession of activities allowed?

No, the sub-concession of activities is not allowed.

5. Could the concessionaire/lessee lodge a purchase proposal upon expiry of the concession/rental? Yes, pursuant to Art. 3-bis, par. 4-bis of Legislative Decree no. 351/2001, at the end of the period of time provided for by the concessions and rentals referred to in this article, the State Property Office, having verified the achievement of the purpose of redevelopment and conversion of the assets, shall recognize to the Concessionaire/Lessee, should there be no need to use said asset for institutional purposes, the right of first offer for the purchase of the asset, at the market price.

6. What taxes and/or fees are levied on the properties?

The ordinary ones envisaged in real estate matters (IMU -TARI), the rates of which are governed, at a local level, with Regulations from the competent Municipal Administrations.

The provisions of a general nature must in any case be coordinated with any regulatory provisions that provide for concessions, including of a fiscal nature, in favour of certain categories of subjects for the use of public buildings for certain purposes.

7. What is the value to be considered for the compulsory insurance policies that will have to be stipulated?

With reference to insurance policies, before and during the execution of the works, the value of the property to be considered is that of the non-redeveloped asset; once the Works have been completed, before the start of the activity and for the entire residual duration of the concession, the value of the property to be taken into consideration is that of the redeveloped asset. The values of the properties are calculated by the State Property Office in accordance with ordinary techniques and taking into account the type, size, state of conservation and location of the property, as well as the market conditions.

8. Are there any urbanization or infrastructure construction charges related to the redevelopment of the property to be borne by the concessionaire?

Yes, the redevelopment interventions, ordinary and extraordinary maintenance and the connected works indicated in the *Project Proposal* presented in the tender are the responsibility of the Concessionaire/Lessee (see Annexes VII and VIII - Outlines of Concession and Rental Deeds).

9. Is the successful bidder obliged to start the business as proposed in the bid lodged during the tender procedure?

Yes, the successful bidder is obliged to implement the *Project Proposal*. As indicated in the deed/agreement outlines contained in the tender documentation, the State Property Office may organize inspections at the property, periodic checks and assessments aimed at verifying the execution and progress of the works based on the timeline indicated in the *Project Proposal* and the general performance of activities in compliance with current regulations and in compliance with the *Project Proposal* presented during the tender.

In the event of non-fulfilment by the concessionaire/lessee of all the obligations established and contained in the aforementioned outlines, the State Property Office is entitled to declare the immediate forfeiture/termination of the concession/rental and the successful bidder is required to pay a penalty and compensation for any greater damage.

10. In the event of the award of multiple properties, does the failure to sign the deeds/agreements lead to the enforcement of the provisional deposit for each property?

Yes, the bidder remains bound to his/her offer for 240 days, starting from the expiry of the deadline set for the submission of applications. To guarantee the seriousness of the offer, a provisional deposit is placed, which shall be fully enforced by the granting body in the event of the successful bidder's failure to sign the deed/contract. In particular, the provisional deposit is single regardless of the number of lots for which the bidder is participating in the tender and can be fully enforced with reference to each individual lot.

11. What happens upon expiry of the concession/rental agreement?

As provided for in the outlines of the concession deed/rental agreement attached to the Invitation to Tender (Annexes VII and VIII), upon expiry of the concession/rental, the property shall return to the legal availability of the State Property Office, free and with every transformation, improvement, addition and accession made to it, whether or not they are included in the Works.

12. Is the investment envisaged for the redevelopment of the asset tax deductible?

In principle, the extraordinary maintenance costs incurred on third-party properties - therefore also in the case of state-owned properties - are tax deductible within the limits of the quota attributable to each financial year, based on statutory provisions (see Art. 108, par 3 of Presidential Decree no. 917/86).

The accounting standard OIC 24 ("*Intangible fixed assets*") states, in fact, that "*the amortization of the costs for improvements to third party assets is carried out in the lesser period between that of future utility of the expenses incurred and the residual period of the right to use of the asset (e.g. lease, concession, free loan, etc.) taking into account any renewal period, if dependent on the lessee*".

Specifically, each work will be evaluated in a timely manner by the successful bidder in accordance with the due procedures.

13. In the event of an award, if, following the signing of the deed/agreement, difficulties should arise in terms of authorisations, is it possible for the successful bidder to request extensions and/or refunds from the State Property Office or withdraw from the deed/contract in advance?

As indicated in Annexes VII and VIII (Concession and Rental Deed's Outlines), the Concessionaire/Lessee must carry out the interventions within the maximum term of 36 months from the signing of the handover document, without prejudice to the possibility of extension in any case not exceeding 12 months.

He/she has no right to refunds or indemnities of any kind from the State Property Office; he/she has the right to withdraw in advance, for serious reasons, not before 36 months have elapsed from the signing of the deed of concession or of the rental.