

Deliverable 5.3.1 REPORT OF TRANSFERABILITY PROTOCOLS IN PORTUGAL.

WP5 – Transferring

Activity 5.3: Knowledge transfer & mutual learning.

Distribution: Confidential
Date 9. 11. 2020

Interreg 
Mediterranean



Prominent MED

Project co-financed by the European
Regional Development Fund

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CHARACTERISTICS OF THE DELIVERABLE

Ref. WP: 5.3

Partner in charge: RIBERA

Version FINAL

Partners involved: IrRADIARE
and CIMBAL

Date:

30/10/2020

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1. Introduction to Prominent MED project and transferring activities

The main idea of Prominent Med project focuses on the use of Public Procurement of Innovation (PPI) procedures supported by the European Union in order to stimulate the development of innovative technology systems and solutions in the field of energy efficiency and their market uptake. When it comes to innovation, local authorities were mainly involved in development of the infrastructure required to enable and speed up establishment of various institutions directed to innovation, like incubators, RDI centers etc. with main aim to support innovative companies.

Local authorities are rarely directly involved in targeted RDI activities as they were always perceived as buyers and users of mature products and solutions. The challenge that partners are facing is to study and implement (test) PPI procedures that can be transferred in similar contexts of the MED area.

Project is going to enable the areas involved to procure and implement innovation and boost development of a wide range of innovative products and solutions customized and tailored to their needs. Learning areas will have the opportunity to introduce or catalyze PPI procedures into their public procurement policies enabling faster implementation of local strategies and plans aiming at sustainable development through green growth. At the same time partners and involved clusters will get an opportunity to establish close peer-to-peer cooperation on one side and creation of new networks on the other side.

Prominent Med project embraces 3 main different stages: studying, testing and transferring. The first stage called 'studying' was dedicated to learn about innovation procedure from a legal and technical point of view and to prepare the pilot building tender procedure. By means of 'testing' module, the innovative tender procedures were launched and pilot buildings works were conducted and monitored.

The last Prominent Med project module called 'transferring' was devoted to export the PPI methodology, country pilot results and, in general, the knowledge gained by project partners through the organization of dedicated dissemination events and individual meetings.

The present report is dealing with the activity 5.3 knowledge transfer and mutual learning, a task whose aim is to activate the transfer process between project partners and other actors which express the interest to apply the PPI model. The know-how transfer will need the execution of national transfer meetings during which both counterparts would sign a transferability protocol in order to set a common agreement and detailing transfer measures.

2. Introduction to knowledge transfer and mutual learning activities in Portugal

In Biixo Alentejo region (Portugal) the dissemination of Public Procurement of Innovation (PPI) information and the lessons learnt during the implementation the Portuguese pilot was conducted by the two Portuguese Prominent Med project partners: IrRADIARE and CIMBAL.

Activities' main aim was to strengthen the capacity of public and private actors and transfer Prominent MED best practice and to strengthen the capacity of Baixo Alentejo municipalities in institutionalizing PPI into their daily procurement operations. Five public actors, namely five municipalities, expressed interest for PPI and transfer meetings and mutual learning activities was conducted.

3. Overall aim of transferability activities.

CIMBAL municipalities involved in transferability activities were willing to get best practices knowledge about the following issues:

- PPI methodology for small/medium sized of Mediterranean area, developed during Prominent MED project and presented in the guidance “PPI implementation strategy in MED countries”;
- Definition of terms of reference (TOR) and criteria used in the Portuguese pilot in order to assess the economic and technical offers submitted by the bidders;

The public regional actors who expressed strong interest for PPI and wanted to benefit from knowledge transfer and mutual learning activities were as follows:

1. **Municipality of Aljustrel.** <https://www.mun-aljustrel.pt/>. Serpa is a Portuguese city belonging to the district of Beja, Alentejo region and sub-region of Baixo Alentejo. Serpa is one of the most extensive municipalities in Portugal, with an area of 1 105.63 km² and 15 623 inhabitants (2011). The municipality is limited to the north by the municipality of Vidigueira, to the north-east by Moura, to the east by Spain, to the south by Mértola and to the west by Beja.
2. **Municipality of Alvito.** <https://www.cm-alvito.pt/>. Alvito is a Portuguese municipalities belonging to the district of Beja, Alentejo region and sub-region of Baixo Alentejo. The Municipality of Alvito has an area of 264.85 km², 2 504 inhabitants (2011) and is divided into 2 parishes. The municipality is limited to the north by the municipality of Viana do Alentejo, to the east by the municipality of Cuba, to the south and west by Ferreira do Alentejo and to the west by Alcácer do Sal.
3. **Municipality of Mértola.** <https://www.cm-mertola.pt/>. Mértola is the sixth largest municipality in Portugal, with an area of 1 292.87 km² and 7 274 inhabitants (2011) and is subdivided into 7 parishes. The municipality is limited to the north by the municipalities of Beja and Serpa, to the east by Spain, to the south by Alcoutim and to the west by Almodôvar and Castro Verde.
4. **Municipality of Moura.** <http://www.cm-moura.pt/>. Moura is a Portuguese city belonging to the district of Beja, Alentejo region and sub-region of Baixo Alentejo. It is the seat of a municipality with 958.46 km² of area and 15 167 inhabitants (2011). The municipality is limited to the north by the municipality of Mourão, to the east by Barrancos, to the east and south by Spain, to the southwest by Serpa and to the west by Vidigueira, Portel and Reguengos de Monsaraz.
5. **Municipality of Serpa.** <https://www.cm-serpa.pt/>. Serpa is a Portuguese city belonging to the district of Beja, Alentejo region and sub-region of Baixo Alentejo. It is the seat of one of the most extensive municipalities in Portugal, with an area of 1 105.63 km², 15 623 inhabitants (2011) and is subdivided into 5 parishes. The municipality is limited to the north by the municipality of Vidigueira, to the north-east by Moura, to the east by Spain, to the south by Mértola and to the west by Beja.

Its important to mentioned also that CIMBAL, PROMINENT MED project partner, is an association of municipalities concerned with developing, at regional level, of public policies. It is a public body financed by regional and local authorities and is subject to management supervision by those bodies; has administrative, managerial or supervisory board, more than half of whose members are appointed by local authorities

Knowledge transfer and mutual learning activities were conducted in the form of workshops with the supported of Prominent MED deliverables and knowledge and experience acquired during the project execution.

The performed workshop resulted, until the moment, in 5 transfer protocol documents with plans on how to cooperate in the future.

4. Description of the action/process.

The organization of the Transfer Meetings has the purpose to formally launch the knowledge transfer procedure, notifying and bringing together all counterparts' team members and making sure both entities (learning and experienced ones) have a common understanding of the tasks and their roles.

Due to the pandemic situation and to mobility restrictions the meetings were performed online. The first one was dedicated to public entities and the second to private entities. The duration of each meeting was about 3 hours.

During the meetings first part, IrRADIARE and CIMBAL presented the Prominent Med project objectives, activities and results. Also, in the first part of the meeting all the PPI procedure was presented namely in what regards the definition of PPI, the market engagement process and the tendering procedure. In the first part of the meeting it was also possible to hear the opinion of the company that was selected to perform the work in the two buildings. The company explained the difficulties and the advantages of the PPI process.

In the second part of the meetings CIMBAL talked about the lessons learned and the transfer potential was debated. In order to formalize the PPI transfer protocol and design a work plan that will drive the partnership to accomplish the identified expectations, partners agreed to sign a transferability protocol.

The most relevant activities to be performed within the transfer protocols are:

- Exchange of information and documents about Prominent MED guide and all documents produced regarding the pilot developed in Portugal. The basic document to be used for transferring activities is the 'D4.3.1.PPI implementation strategy in Med Countries', that is a set of findings, lessons learned, and recommendations collected during Prominent Med project execution.
- Training activities with the aim at improving the level of knowledge.

The major difficulties encountered during all the process and which are still occurring are related to the fact that in Portugal and as part of the current National Reform Program, the promotion of a Public Procurement Program for Innovation is very recent. This fact makes it harder to find national experts on PPI and to start the implementation of the Market Consultation. Also, in what regards innovative solutions it was difficult to find the appropriate market solutions to be implemented in buildings in historic sites.

Another difficulty mentioned is that technical and legal municipal personnel are not capacitated to perform public procurement processes in a different way than the common procedures and they are very sceptical about the idea of the great market providing 'the best option'.

The presentation of the project and all the process was important to show that is possible and that other entities can benefit from the lessons learned during PROMINENT MED project.

5. Results & conclusions

IrRADIARE and CIMBAL achieved the involvement of 5 municipalities with the agreement reached by the Prominent Med knowledge transferring protocols.

In conclusion it is important to highlight that PPI is difficult to fit into the current scenario of small municipalities characterized by low skilled staff and restricted rules in terms of public procurement, however they are very interested in learning and to developed a PPI. CIMBAL, as a regional public entity, will have an important role in what regards the support and training. Also, CIMBAL will make its support tools available to the municipalities for the development of more projects in the PPI framework.

6. Annex I. Transferability protocols signed