

CHARMEU

**TENDER FOR EVALUATION BODY
OF THE
GRANTS TO INFORMATION PROVISION AND PROMOTION MEASURES
CONCERNING AGRICULTURAL PRODUCTS IMPLEMENTED IN THIRD
COUNTRIES**

CHARMEU -

IN THE FOLLOWING MARKETS:

**USA
CANADA**

**SPECIFICATION
GENERAL CLAUSES**



1. Introduction

Consorzio Tutela Vini d'Abruzzo, Agricultural Cooperative of Rachi Pierias O AGIOS LOUKAS, Union des vins doux de Bordeaux, Union of Agricultural Cooperatives of Kavala (KAVALA COOP) jointly submitted a proposal upon the 2020 Call for proposal – Multi programmes of the (EU) Regulation No. 1144/2014, which has been selected for funding.

The program aims at promoting Italian and French wines with Greek fruits on selected USA and CANADIAN markets, enhancing the level of recognition and awareness towards the EU quality schemes (PDO). This tender document is aimed at selecting the third party with whom the beneficiaries will establish a contract for the execution, coordination and follow-up of the action.

The framework for the present call for proposals is set by the Grant Agreement No. 101015721 and all the provisions and obligations here provided comply with it. The acceptance of the EU contribution is set as preliminary condition.

2. General information

a. Title of the action

THE CHARMING STASTE OF EUROPE

b. Proposing organizations

The project consortium sees the collaboration between three EU Countries, Italy , France and Greece represented by four organizations.

Beneficiary	Role	EU Country	Website
Consorzio di Tutela Vini d'Abruzzo	Leading beneficiary	Italy	www.vinidabruzzo.it
Agricultural Cooperative of Rachi Pierias O AGIOS LOUKAS	Beneficiary	Greece	https://www.kerasiarachis.gr/index-en.php
Union des vins doux de Bordeaux	Beneficiary	France	https://www.sweetbordeaux.com/
Union of Agricultural Cooperatives of Kavala (KAVALA COOP)	Beneficiary	Greece	http://www.easkavalas.gr/

c. Products to be promoted

The promotional program is aimed at the following **ITALIAN, FRANCE and GREEK PDO products**.

Product Recognition Code	Product
PDO-FR-A0707	Premières Côtes de Bordeaux
PDO-FR-A0686	Cadillac
PDO-FR-A0170	Loupiac
PDO-FR-A0714	Sainte-Croix-du-Mont
PDO-FR-A0668	Cérons
PDO-FR-A0274	Côtes de Bordeaux-Saint-Macaire (moelleux)
PDO-FR-A0274	Côtes de Bordeaux-Saint-Macaire (liquoreux)

PDO-FR-A0821	Bordeaux (blanc avec sucres)
PDO-FR-A0306	Bordeaux supérieur (blanc)
PDO-IT-A0880	Abruzzo PDO
PDO-IT-A0743	Cerasuolo d'Abruzzo PDO
PDO-IT-A0723	Montepulciano d'Abruzzo PDO
PDO-IT-A0728	Trebbiano d'Abruzzo PDO
PDO-IT-A0883	Villamagna PDO
PGI-IT-A0745	Colline Frentane PGI
PGI-IT-A0893	Del Vastese/HistoniumPGI
PGI-IT-A0891	Colline Teatine PGI
PGI-IT-A0898	Terre Aquilane / Terre di Chieti PGI
PGI-IT-A0901	Terre di Chieti PGI
PGI-IT-A0887	Colline Pescaresi PGI
CN code: 08105000	Kiwis
CN code: 08092900	Cherries

d. Target countries and budget

The promotional program is targeted to the following countries: USA, CANADA

The total amount for the evaluation activities in all the targeted countries is set at €20.000,00 for year 1, €20.000,00 for year 2 and €20.000,00 for year 3, for a maximum level of investment fixed at 60.000,00 €

e. Timeline

This promotional program will run from January 1st 2021 to December 31st 2023.

The evaluation period will run from January 1st 2021 to February 28th 2024.

3. Objectives of the actions, messages to be conveyed and impact indicators

The table below summarises the impact indicators defined for the campaign.

Impact indicator description	Baseline	End of programme
Increase awareness of the merits of the Union's agricultural products and of the high standards applicable to production methods in the Union	A precise assessment of the target is not available; therefore the baseline will be established from the first information provided by the assessment study at the beginning of the first year.	6,347,000 consumers who will have increased their level of knowledge by the end of the project (5,343,000 in USA – 14,8% of the target; 1,004,000 in Canada – 9% of the target); 4,594 operators who will have increased

		their level of knowledge by the end of the project (3,315 in USA – 55% of the reached operators; 1,280 in Canada – 61% of the reached operators)
Increase the competitiveness of specific eu products through the increase of value and volume of export of the products promoted in the target countries	132,017,399.29 € which corresponds to the total forecast export value expected without the campaign that will be reached in the 3 countries during the years 2021, 2022, 2023	During the 3 years of the campaign an increase of 23,378,845.06 € on the forecast export value without the campaign is expected to be reached. This will correspond to an increase of 19% in USA and 16% in Canada.
Economic		

4. Activities

In order to assess the effectiveness of the promotional activities executed, the evaluation body will provide a set of indicators to monitor expected results in terms of output, results and impact (informative and economic).

The table below can be used as sample to summarize the indicative set of indicators that will be used to check the progress and evaluate the project.

2.1 PR e PRESS OFFICE	Output indicators	
	Mailing List	2
	Press realease	60
	Media Clipping report	6
	Press kit	2
	Result indicators	
	Contacts of US journalists	5.000
	Contacts of Canadian journalists	1.500
not paid articles	600	
2.2 BRAND AMBASSADOR	Output indicators	
	Collaborazioni anuali con brand ambassador	9
	Result indicators	
	Attendances to the events	80
	Continuos PR activities	

3.1 SITO WEB	Output indicators	
	web site	1
	Result indicator	
	Visitors in website	45.000
3.2 SOCIAL MEDIA	Output indicators	
	Facebook page	1
	Instagram account	1
	Result indicators	
	Facebook like on page	30.000
	Instagram follower	6.000
4.1 ADVERTISING ON PRINT MAGAZINE	Output indicators	
	Advertising on American magazine	24
	Advertising on Canadian magazine	12
	Result indicators	
	Consumers, jornalist and OP reached in USA	25.000.000
	Consumers, jornalist and OP reached in Canada	5.000.000
4.2 ADVERTISING ONLINE	Output indicators	
	Social media advertising campaign in USA	3
	Social media advertising campaign in Canada	3
	Google Ads campaing in USA	3
	Google Ads campaing in Canada	3
	Result indicators	
	Impression of the online advetising in USA	2.500.000
	Impression of the social media advertising	3.000.000
5.1 CONCEPT GRAFICO AND COMMUNICATION TOOLS	Output indicators	
	Graphic concept of the campaign	1
	Information leaflet for operators	4.500
	Tasting notes for operators and press	4.200
	Placemats for operators	3.000
	Flyers for consumers	185.000
	Gadget for operators and press	4.500
	USB	3.000
	Banner	10
	Flyers for trade fair	42.000
	Result indicators	
Communication tools distributed	95%	
5.2 VIDEO	Output indicators	
	Video of the campaign	21
	Result indicators	
	Impression of each video	20.000
6.1 STAND AT TRADE FAIR	Output indicators	
	Attendance at Fancy Food	3
	Attendance at Sial Food	3
	Result indicators	
	B2B meeting during the fair people inform during the fair	at least 30
		18.000
6.2 EVENTS FOR TRADE OPERATORS	Output indicators	
	Walk around tasting in USA	6
	Walk around tasting in Canada	6
	Seminar in USA	9
	Seminar in Canada	3
	B2B in USA	16
	B2B in Canada	7

	Result indicators	
	attendees at walk around tasting in USA	900
	attendees at walk around tasting in Canada	300
	Attendees at Seminar in USA	200
	Attendees at Seminar in Canada	60
	Attendees at B2B in USA	200
	Attendees at B2B in Canada	100
6.3 EDUCATIONAL ACTIVITIES WITH CULINARY AND SOMMELLERIE SCHOOL AND CLUB	Output indicators	
	live lessons in USA	6
	live lessons in Canada	3
	webinar in USA	7
	webinar in Canada	3
	Result indicators	
	Attendees to live lesson in USA	300
	Attendees to live lessons in Canada	150
	Attendees to webinar in USA	1.750
Attendees to webinar in Canada	900	
6.4 RESTAURANT WEEK	Output indicators	
	Restaurants engaged in USA	45
	Restaurants engaged in Canada	30
	Result indicators	
	Consumers reached by the activities in USA	30.000
Consumers reached by the activities in Canada	20.000	
6.5 SPONSORSHIP OF EVENTS	Output indicators	
	Sponsorship of Wine media conference	3
	Sponsorship of European Film Festival	3
	Result indicators	
	Journalists meets during the Wine Media conference	800
Consumers reached during the European Film Festival	90.000	
6.6 STUDY TRIPS IN EUROPE	Output indicators	
	Tour in Italy from USA	9
	Tour in Italy from Canada	9
	Tour in Greece from USA	3
	Tour in Greece from Canada	3
	Tour in France from USA	3
	Tour in France from Canada	2
	Result indicators	
	Attendees from USA to the Italian tour	120
	Attendees from Canada to the Italian tour	54
	Attendees from USA to the Greek tour	6
	Attendees from Canada to the Greek tour	6
	Attendees from USA to the French tour	18
Attendees from Canada to the French tour	12	
not paid articles published after the trips	260	
6.7 PROMOTIONAL DINNER	Output indicators	
	Promotional dinner in USA	15
	Promotional dinner in Canada	6
	Result indicators	
	Attendees to the promotional dinner in USA	450
Attendees to the promotional dinner in Canada	250	
7.1 POINT OF SALES PROMOTION	Output indicators	
	Tasting days in USA	210
	Days of display promotion in USA	410

	Point of sales involved in USA	90
	Tasting days in Canada	120
	Days of display promotion in Canada	2.760
	Point of sales involved in Canada	288
	Result indicators	
	Consumers which taste the products in USA	21.000
	Consumers reached by display promotion in USA	84.000
	Consumers which taste the products in Canada	24.000
	Consumers reached by display promotion in Canada	138.000
8.1 OTHER ACTIVITIES: WINE GUIDE TOUR	Output indicators	
	Attendance to Great Wine tour in USA	3
	Attendance to Gambero Rosso World Tour in USA	3
	Attendance to Slow Wine Tour in USA	3
	Attendance to Gambero Rosso World Tour in Canada	3
	Result indicators	
	Attendees to Great Wine tour in USA	1.200
	Attendees to Gambero Rosso World Tour in USA	900
	Attendees to Slow Wine Tour in USA	1.000
	Attendees to Gambero Rosso World Tour in Canada	600
Articles published about the Tour	100	
9. EVALUATION OF RESULTS	Output indicators	
	Evaluation of results	9
	Result indicators	
	Quantitative and qualitative data from the results and impact of the action	

Though an orientative set of indicators has been submitted by the beneficiaries in the proposal as per the following table, the competing agency should present their own list of indicators they consider useful to evaluate the execution and the effectiveness of the actions.

The following section provides the description of the evaluation activity such as presented in the approved proposals.

General information: please note that the sub-totals for each activity reflect the proposal submitted and could be used as an indicative budget. Nevertheless, the competing agencies are invited to submit their own proposal, providing what they think is the most effective budget proposal to achieve the planned objectives.

Work package	9. Evaluation of the results		
Description of activity	In order to evaluate the results achieved by the campaign, an independent and accredited studio will be commissioned to carry out an evaluation study of the impact of the campaign on the identified targets, with respect to the activities carried out as specifically described in section 7.		
Timeline	YEAR 1	YEAR 2	YEAR 3
Deliverables/ Services	1 Evaluation study report 4 surveys (month 2-12)	1 Evaluation study report 4 surveys (month 13-24)	1 Evaluation study report 4 surveys (month 25-36)
Budget analysis	Administration of surveys 4.000 € Evaluation study 15.000 € Report 1.000 €	Administration of surveys 4.000 € Evaluation study 15.000 € Report 1.000 €	Administration of surveys 4.000 € Evaluation study 15.000 € Report 1.000 €
Sub-total	USA 10,000 € Canada 10,000 €	USA 10,000 € Canada 10,000 €	USA 10,000 € Canada 10,000 €

Implementation	Proposing organization – Consorzio Tutela Vini d'Abruzzo
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The evaluation activity will monitor all the other project activities, which are synthesized as follows:

WP 1: Coordination

WP 2: Public relations

WP 3: Website and social media

WP 4: Advertising

WP 5: Communication tools

WP 6: Events

WP 7: In store promotions

5. Obligations of the evaluation body

a. Reporting & Invoicing

Upon completion of each of the planned activities, the evaluation body is responsible for presenting an annual report providing at least all the information requested by CHAFEA and, in addition to that, all the others mentioned in the technical offer.

Requests for payment must be presented to the beneficiaries accompanied by the invoice. The payments will be made by the beneficiaries by bank transfer to the account of the evaluation body.

b. Controls

An agreement will be signed between the beneficiaries and the evaluation body, transposing to this contract the main rules, obligations and procedures provided for in the grant agreement to be signed by the beneficiaries and the Consumers, Health, Agriculture and Food Executive Agency (CHAFEA), establishing penalties in case of non-compliance due to the evaluation body and predefined conditions for resolution of the contract.

Beneficiaries will take on permanent follow-up of execution with the implementing bodies and the evaluation body, exchanging information and intervening on a daily basis

6. Participation to the tender

a. Documents to be submitted

To participate in this tender, the applicant to the “evaluation body” role must submit a proposal for implementation of the “Grants to information provision and promotion measures concerning agricultural products implemented in the Third Countries THE CHARMING TASTE OF EUROPE”, which must include the following elements:

- A request to participate to the tender, signed by the legal representative of the competing agency
- A technical offer prepared
- A detailed budget proposal

- An official document released by the State where the agency is located proving the registration in the respective official registry (following the local regulation)
- CVs of the team members involved in the execution of the action

All the documents except for the registration document and the financial statement must be provided in English. Registration document may be provided in the language of the competing agency and the evaluation committee may require to provide a free translation in Italian and/or English.

b. Technical offer

The technical offer must include the following elements:

- Company – Address, E-mail, Phone, Fax
- Contact Person – Function, E-mail, Phone, Fax
- Presentation and background of the company
- Information on the technical competencies and professional capabilities of the company and its team
- Information on the company capability to perform the evaluation required, the methodology that will be followed and examples of evaluation performed on former programs having similar characteristics to this one as well as similar products on the targeted markets
- Dates, schedules and details of the execution of the evaluations per market/country
- Additional comments or suggestions (optional)

The application will be considered invalid if any of the elements from a) to f) is missing.

c. Detailed budget proposal

The candidate to evaluation body has to submit a budget:

- For each activity
- Showing separately the costs per type of expense (Personnel costs, Costs for subcontracting, Other direct costs – Included travel costs)

A summary of the investment proposed must be provided, using the template below:

Headings	Years	A. Direct personal costs	B. Direct cost of Subcontracting	C. Other direct costs	TOTAL
Evaluation of results					
	Year 1				
	Year 2				
	Year 3				
TOTAL		0,00	0,00	0,00	0,00

Please note that the overall budget proposal (costs + personnel) must not exceed the fixed maximum amount listed in section 2.d.

d. Deadline

The closing date for this tender is 30/11/2020 (12:00).

The documentation must be presented via certified e-mail, by the closing date and time provided above. Bidders are fully responsible of ensuring that the proposals are delivered to the address provided by the peremptory term fixed by the deadline. Proposals received after the deadline will not be considered for evaluation.

The proposals must be sent to the following certified email address:

consorzio-viniabruzzo@pec.it

Alternative address to send proposals within the deadline, in case of unavailability of certified mail for the bidder and subsequent need to send the proposal through 1 traditional email messages:

segreteria@vinidabruzzo.it

All the documents must be signed by the legal representative of the economic operator participating in the selection process; in the case of a temporary grouping already constituted must be signed by the legal representative of the designated competitor as the group leader; in the case of a temporary grouping that has not yet been made up, the offer must be signed by all parties that will form the aforementioned grouping.

The message must present as subject:

TENDER FOR EVALUATION BODY OF THE GRANTS TO INFORMATION PROVISION AND PROMOTION MEASURES CONCERNING AGRICULTURAL PRODUCTS IMPLEMENTED IN THIRD COUNTRIES (THE CHARMING TASTE OF EUROPE)

The delivery of the Certified Email and/or traditional e-mail messages remains at the sole risk of the sender if, for whatever reason, it does not reach its destination within that peremptory period. The sender can ask for confirmation that the email message has been received. This receipt will only prove that the messages have been received and will in no way constitute proof of compliance of the documentation submitted.

For any request of clarification proposing agencies may send an email to segreteria@vinidabruzzo.it

7. Evaluation criteria

Following the entry into force of the Urgent Measures on Containment and Management of the Epidemiological Emergency by COVID-19, in accordance with the provisions in order to avoid contacts and movements, the opening of proposals relating to this procedure will take place in a restricted manner, also through online tools, with the participation of only the members of the Committee.

Date: 02/12/2020

Local time: 10.00 (GMT +2.00)

Private session for the members of the Committee only, carried out through online tools.

The Evaluation Commission, once opened the emails and checked the documents, will continue, in the same session or in other sessions, if needed, to carry out the procedures for evaluating technical offers. The Committee work will be properly recorded with an indication of the reasons for the assessments carried out.

The economic offer will be assessed at the end of the evaluation of the technical offers made by the Committee.

The proposals will be analyzed and evaluated by the beneficiaries in order to identify the most competitive proposal in terms of value for money. Therefore, the following criteria will be evaluated jointly:

- Quality of the technical offer (85 points maximum)
- Competitive budget proposal (15 points maximum)

The following criteria and sub criteria are defined for the evaluation:

TECHNICAL OFFER: 85 POINTS MAXIMUM		
Criterion	Sub criteria	Maximum score
1. QUALITY AND FEASIBILITY OF THE PROPOSED METHODOLOGY	Quality of the work group dedicated to the project management activity (CV evaluation of the dedicated work group)	Up to 15 points
	Adequacy of planning in terms of consistency with the objectives and the planned promotional activities: in particular, quality of the proposed methodology in terms of data collection tools, sample definition and sample significance, quality of the survey collection methodology	Up to 5 points
Maximum score		20
2. PREVIOUS EXPERIENCES	Previous experiences in evaluation of similar projects: in particular, experiences in terms of same products and/or same target markets and/or same funding source	Up to 30 points
	Previous experiences in collecting direct surveys: in particular, experiences in terms of same products and/or same target markets	Up to 20 points
Maximum score		50
3. PROPOSED SET OF INDICATORS	Adequacy of the proposed set of indicators in terms of consistency with the objectives and the planned promotional activities	Up to 15 points
Maximum score		15

The commission will evaluate every technical offer assigning a qualitative score to each sub criterion based on the following table:

not detectable	0
irrelevant	0,1
nearly sufficient	0,2
sufficient	0,3
sufficient/discreet	0,4
discreet	0,5
discreet/good	0,6
good	0,7
good/very good	0,8

very good	0,9
excellent	1,0

COMPETITIVE BUDGET PROPOSAL: 15 POINTS MAXIMUM		
Criterion	Sub criteria	Maximum
COMPETITIVE BUDGET PROPOSAL	Competitive budget proposal for Direct personnel costs (as per following rule)	Up to 10 points
	Competitive budget proposal for rebate (as per following rule)	Up to 5 points
Maximum score		15

Sub criterion: "Competitive budget proposal for direct personnel costs"

Score = (Offer X / Maximum offer) * 5

Where:

Offer X is the budget proposal for direct personnel costs that is evaluated

Maximum offer is the highest budget proposal received

Sub criterion: "Competitive budget proposal for rebate"

Score = (minimum % rebate / current % rebate) * 10

Where:

minimum % rebate is the lowest implementing body fee received

current % rebate is the implementing body fee received for the proposal that is evaluated

In the score calculation, values will be considered up to 2 digits.

Proposals with a budget above the global tender value will be rejected.

The proposals with the highest total final score are selected for execution. In the event of a tie, the lowest price offers are selected.

Only the proposals from entities without any link to the proposing organizations will be accepted.

Possible conflict of interests will be assessed, and their implementing proposals refused if identified economic interest, political or national affinity, family or emotional ties or any other shared interest between beneficiaries and implementing bodies, removing any influence on the selection process, the award value or the execution of the program

8. Data processing

Under D.Lgs. 196/2003 and the Regulation (EU) 2016/679 of the European Parliament and the Council of 27 April 2016 containing the European Data Protection Regulation (below also "GDPR"), it is informed that the data collected is intended for the choice of the contractor and their award is optional in nature, If the competitor wishing to participate in the procedure or win the contract, the contractor must provide the contracting body with the documentation required by the current legislation. The rights of the person concerned are those provided for in Article 13 of the law cited. These rights may be exercised under and for the effects of D.Lgs.

196/2003 and GDPR. The data collected can be communicated to the staff of the Contractor Organization that is responsible for the proceedings and to any other person who has an interest in it under Law 241/1990 s.m.i.

In particular, in relation to the procedure established by this procedure:

1. the objectives to which the collected data are held are in order to verify the ability of competitors to participate in the competition in question;
2. the data provided will be collected, recorded, organized and stored for the purposes of the management of the race and will be processed, both by paper and magnetic support, even after the possible establishment of the contractual relationship, for the purposes of the report;
3. the provision of the required data is mandatory, otherwise the competing agency is excluded from the competition;
4. the subjects or categories of subjects to whom the data can be disclosed are: 1) the staff of the Contracting Organization; 2) competitors; 3) any other person who has an interest under Act 241/1990 and s.m.i.;
5. the rights to the person concerned are those of art. 7, of D.lgs. 196/2003 and s.m.i. and articles from 15 to 22 of GDPR, to which it is postponed;
6. active subject of the collection is the Contracting Body

The owner of the data is the Consortium Tutela Vini D'Abruzzo (C.F. 91007620692 and P.I. 02199550696) based in Corso Matteotti – Palazzo Corvo, SNC – 66026 – Ortona (CH), e-mail: amministrazione@vinidabruzzo.it under Article 28 of the European Data Protection Regulation ("GDPR") and Article 29 of D.Lgs. n. 196/2003, as well as the Italian GDP Adjustment Regulation.

For any further aspect, it is possible to refer to the "Customer Data Processing Statement" of the Consorzio di Tutela Vini d'Abruzzo, that can be found on the Contracting Body website.