

CALL FOR TENDER

EVALUATION BODY SELECTION PROCEDURE

EU PDO-PGI WINE IM - 101046128 project, based upon REGULATION (EU) No 1144/2014 of the European Parliament and of the Council of 22 October 2014 on information provision and promotion measures concerning agricultural products implemented in the internal market and in third countries and repealing Council Regulation (EC) No 3/2008, laying down the rules for the participation and dissemination in Promotion of agricultural products program and the Multi-programmes Call for proposal 2021.

1. General information about the campaign

EU PDO-PGI WINE IM – 101046128 is a multi-program project based upon Regulation (EU) No 1144/2014 (Promotion of Agricultural products) and managed by the following parties:

the project "coordinator": ORGANIZACIÓN INTERPROFESIONAL DEL VINO DE ESPAÑA (OIVE), established in CALLE PADILLA 38, MADRID 28006, Spain, VAT number: G87595328

and the "beneficiary": VINI PORTUGAL ASSOCIACAO INTERPROFISSIONAL DO VINHO (VINI PORTUGAL), established in RUA MOUZINHO DA SILVEIRA 5, LISBON 1100-148, Portugal, VAT number: 503 736 864.

This project is a joint effort between two of the most preeminent wine associations in Europe, in terms of national production and representativeness:

OIVE: The interbranch organization of the Spanish wine industry, representing approximately an 85% of the national wine production.

VINI PORTUGAL: The interbranch organization of the Portuguese wine industry, representing approximately a 69% of the national wine production.

As such, both integrate a consortium led by OIVE, with VINI PORTUGAL as a beneficiary. The main objective of the project is launching a campaign that aims to promote the concept of European quality-schemes, by using the wines of Spain and Portugal as representative products. The project is focused on the internal EU market and the campaign would seek as well to promote a message of responsible and moderate consumption, portraying wine as a product of excellence and of deep European tradition. The objective also includes, as another parallel goal, to increase the competitiveness of the wine industry within the Iberian Peninsula.

The co-financed actions shall be implemented over a period of three years (2022-2024). The starting date of the project is 1st January, 2022.

The **target audiences** of the programme will be:

Audience 1: B2B	
TG1: Wine professionals	It mainly involves professional stakeholders who work directly with wine in Europe, such as importers and sommeliers.
TG2: Media and KOLs	By addressing lifestyle, digital gastronomic and wine-specialized outlets in Europe, always accompanied by responsible and moderate consumption messages.
Audience 2: B2C.	
TG3: Consumers	The campaign would target inbound consumers, coming to the target markets as tourists. Spain and Portugal are both very touristy and attractive for European travellers, which in turn end up being wine consumers. The campaign will take on the challenge of informing and educate them on what the EU's quality schemes stand for, with campaign materials and advertisement spots. Moreover, the campaign will also put a special emphasis on how to enjoy PDO/PGI wines responsibly and with moderation.

The **actions** will consist of:

Activities	Description
Public relations	Press events will be held yearly in order to inform local and also European media about the purpose of the campaign, as well as and the ongoing promotion of PDO/PGI wines present in the target countries.
Website and social media	It is an activity mainly focussed on the project's information both for professionals and consumers. The target public will be reached by work done by a SEO strategy and social network management so that the information reaches the desired contact's profile.
Advertising	This activity will mainly target European consumers in their inbound trips to the peninsula. It will consist of physical advertisement in the shape of banners, promotional messages within the European tourists' arrival zones, targeting airports, ports, as well as other forms of inland transportations, such as train stations.
Events. Showrooms and VIP dinners	This activity aims to strengthen relationships with both wine professionals and media. It will be a presentation of the campaign and PDO/PGI wines to a selected group of individuals with a great impact in the internal EU market.
Events. Study travel	European wine professionals, media and/or KOLs will be invited to visit the wine-producing and PDO/PGI regions of both state members. This activity seeks to inform and show, to the relevant stakeholders, the excellence of the European production model.
Other events. Educational weeks	Educational corner weeks will be implemented in international arrival areas at airports (Spain and Portugal), with the purpose of offering to the European tourists customized information on the quality wines available in the target markets, the PDO/PGIs available around their arrival area and transmitting a message of responsible wine consumption during their stay in the target countries.
Other events. PDO/PGI wine congress	The congress will consist of 2 areas: Zone A): wine-tasting area only for relevant stakeholders. It will only feature PDO/PGI wines, showing the great diversity, safety and tradition (among others), as well as the outstanding European quality. Zone B): experts' area, featuring speakers on behalf of the program, with a wine-related background who will inform and educate the attendants in sustainable practices in the world of wine, and how to enjoy it in a responsible way. Academic and sustainability experts will also be invited.

2. Information on the required services and budget

A mix of promotional and informative activities has been designed through a strategy adapted to each target country and target groups: consumers and professionals.

Promotion and information provision actions consist of the following activities:

- a) WP1 - Management of the project
- b) WP2 - Public Relations
 - PR activities
 - Press events
- c) WP3 - Website, social media
 - Website setup, updating, maintenance,
 - Social Media (accounts setup, regular posting)
- d) WP4 - Advertising
 - Print
 - Outdoor
- e) WP5 - Communication tools
 - Visual campaign, publications, media kits, promotional merchandise
 - Promotional videos
- f) WP6 - Events
 - Seminars, workshops
 - Study trips to Europe
 - Other events
- g) WP7 – Evaluation of results**

All the above activities are in line with Regulation (EU) No 1144/2014 and Article 6 of the Call for Proposals 2021 - Multi-programmes. The activities of WP1, WP2, WP3, WP4, WP5 and WP6 will be managed by the proposing organisations or the Implementing Body; the selected Evaluation Body must cooperate with them to ensure the accurate implementation of its tasks.

The total budget of the project, including the implementation of all the actions described above, is **€ 2,168,516,25**.

Both the OIVE and VINIPORTUGAL have the necessary resources and expertise to carry out the project on their own. However, in order to ensure the best

implementation of the EU PDO-PGI WINE IM - 101046128 actions, independent companies will be subcontracted to support the implementation and evaluation of the campaign.

The present call is launched for the **SELECTION OF A CAMPAIGN EVALUATION BODY** to carry out the above-mentioned **Work Package 7 - Evaluation of Results**.

The project defines the costs directly related to the implementation of the activities and the fees of the evaluation body. In case of award, a guarantee from a third party (credit institution or insurance agency) may be required from applicants before the signature of the contract.

The **TOTAL MAXIMUM BUDGET** allocated to the **EVALUATION OF RESULTS** is **€85,200**.

3. Implementation of evaluation tasks by subcontractor

As reported in the proposal, proposing organisations have to define and select an evaluation body. The evaluation agency must be a **company specialised in results measurements (ReM) & market research** and will be in charge of **evaluating the whole campaign** providing reports in its first and last year of the project, as well as a mid-campaign report.

This agency has to demonstrate and guarantee its technical and operational expertise in measuring the results of information and promotion campaigns in simple and multiple programmes, targeting both internal and third countries.

The **main objective** of this activity is to **measure the impact and effectiveness of the information campaign** based on qualitative data (product knowledge, consumption habits, etc.) and quantitative data (exports, product demand, price, etc.) in each target country.

A study will be carried out every year, in order to establish the evaluation framework for each country. The last study will be carried out in the third year

with the objective of evaluating the final impact of all the activities implemented during the programme.

Specifically, the outputs of the evaluation body will be:

YEAR 1: Initial evaluation study (evaluation framework). Month 12.

Report on the programme development with yearly deliverables:

- Methodology /actions
- Output / results
- Impact Indicators

YEAR 2: Mid-term evaluation study. Month 24.

Report on the programme development with yearly deliverables:

- Methodology /actions
- Output / results
- Impact Indicators

YEAR 3: Final evaluation study (Analysis of results of the campaign). Month 36.

Report on the programme development with yearly deliverables:

- Methodology /actions
- Output / results
- Impact Indicators

It will also be necessary to have an initial report before the start of the campaign in order to use it as a reference for the following evaluations and understand the situation of the markets before the implementation of the programme.

4. Call for tender

Interested companies are invited to participate and submit their offers, following the detailed arrangements described below.

5. Selection process

Following the above:

1. OIVE and VINI PORTUGAL submitted EU PDO-PGI WINE IM - 101046128 proposal in May 2021 that it has been awarded in September 2021;
2. The selection procedure must be aligned with the following principles and provisions:
 - It must respect the principles of non-discrimination, equal treatment and full transparency of the selection and evaluation criteria of the proposals;
 - "open call" has been selected by the Parties as the best procedure in order to allow all the interested companies in participating to the call to submit their own proposals;
 - Although several variables will be evaluated, cost effectiveness will be the most weighted criteria complying at all times with the best-value-for-money requirement.

The selection process will be carried out in accordance with the following phases:

a) Phase 1: Publication

The tender will be published making sure that the maximum number of applicants is reached. To this effect, the tender will be published at least on the website of the beneficiaries and in the Spanish and Portuguese Ministries.

Interested companies will have at least 20 days from the publication date of this briefing for the submission of all the required documentation.

b) Phase 2: Selection. Selection criteria

At this stage, the agencies that have submitted the required documentation within the deadline will be selected attending to the following criteria:

Selection criteria
1. Minimum operational capacity for the evaluation of the programme results
2. Minimum technical capacity for the evaluation of the programme results, experience in the evaluation of simple and multi-EU programmes.
3. The non-existence of conflict of interest, personal, social with the requesting entity.
4. The non-existence of conflict of interest in the markets and / or products to be promoted.

The candidate that does not meet the full selection criteria, will not be eligible.

During the selection phase, at least 3 companies (preselected agencies) will be shortlisted.

c) Phase 3: Evaluation. Evaluation criteria

All the preselected agencies will have to submit a technical and economic proposal for the requested services within 2 weeks from the day on which they are notified that they have been short-listed. Agencies must define an executive proposal, completed by a detailed cost analysis. For this purpose, the preselected agencies will be provided with the full Description of Action and detailed budget so that they can prepare their proposals with full knowledge of the specific features of the programme.

Said proposals will be evaluated alongside with the technical documentation previously provided in the selection phase. The evaluation will be carried out by a committee of professionals from the proposing entities, according to the following criteria:

Evaluation criteria	
<i>Technical Documentation</i>	<i>45 points max</i>
1. Project evaluation capabilities	15 points max
2. Development of the offered services and overall comprehensiveness	20 points max
3. Working group quality	10 points max
<i>Economic offer – Cost efficiency to the proposal</i>	<i>55 points</i>
1. Total cost of evaluation activities	55 points

Although several variables will be evaluated, cost effectiveness will be the most weighted criteria complying at all times with the best-value-for-money requirement.

d) Phase 4: Award

The results of the tender will be formally reported by email to all participants. Besides, all documentation related to the selection process and submitted by the selected agency will be sent to the competent body for approval of the selection.

6. Required documents for the submission of the offer

6.1. Required documents for the Selection phase (all interested companies)

a) Administrative documentation

- 1) Declaration on Honour (Attachment 01).
- 2) Legal entity Form (Attachment 02), supported by the extract of the company from the official journal.
- 3) Certificate of liability to VAT, signed by the relevant revenue agency;

b) Technical documentation

- 1) A description of the profiles involved in the proposed working group and a general description of the company and its internal structure.
- 2) A description of the experience in the evaluation of EU programmes and a brief description of the experience in evaluating similar programmes (with reference to the last years, from 2011 to 2020).

It is further specified that the submission of the administrative and technical documentation requested in this point 6.1 is mandatory and an eligibility condition. For what concerns the tenders for services and supplies, *previous experience requirement* represents the main criterion by which the company may be selected (shortlisted) in the selection phase.

6.2. Requested documents for the Evaluation phase (only preselected companies)

a) Technical proposal

- 1) A detailed description of the methodology and organization which are intended to be deployed during evaluation of results for the campaign. (Description of Action will be provided to all shortlisted agencies/companies so that they can prepare their proposals with full knowledge of the project details).

b) Economic proposal

The economic proposal will consist in a declaration, signed by the legal representative, stating the economic offer of the applying company. This will have to be comprehensive of the total costs of the evaluation activities.

7. Participation method

Described documents in **point 6.1** will have to be sent via email to the following email address:

info@oive.org / internacional@oive.org

indicating the following Subject:

"Proposal for the selection of the evaluation body of *EU PDO-PGI WINE IM - 101046128* Project".

Documents must be sent within **25th February 2022 at 2.00 p.m.**

In order to guarantee a proper, neutral and not discriminatory assessment, avoiding any possible conflict of interests, the evaluation of the proposals will be determined by an ad hoc constituted team of professionals.

Committee will take into consideration the overall coherence of the proposals with regard to the Project structure and the specific contents reported in the Description of Action of the Programme.

In case of no proposal is sent within the established dead-line, the Coordinator reserves the right to appoint autonomously the evaluation body, with duly respect of the applicable procedures referred to the Regulation EU No 1144/2014.

8. Applicable law and settlement of disputes

The Call for tender is governed by the applicable EU law supplemented, if necessary, by the law of Spain.

Any dispute or controversy arising from the interpretation, application or validity of the present Call for Tender shall be settled as far as possible amicably or by mediation (Madrid Court of Arbitration), in accordance with the applicable EU law supplemented, if necessary, by the law of Spain.

9. Privacy Statement

The *Coordinator* respects your privacy and takes seriously the protection of your personal information. The privacy policy on our website (www.interprofesionaldelvino.es) describes how we collect and use your personal information through our website and related activities. By participating in the selection, you consent to the collection and processing of your personal data, in the meaning of the European Regulation 679/2016. We collect your information in an effort to communicate with you about this selection. OIVE recognizes that it must maintain and use your information responsibly.

10. Other information

For any doubts or questions, please contact the Coordinator through the e-mail address: internacional@oive.org / info@oive.org

Answer will be provided in the shortest time possible, by answering to the same email address which sent the question.

Madrid February 4th, 2022