

**TECHNICAL SPECIFICATIONS AND SELECTION PROCEDURE
OF THE IMPLEMENTING BODY OF THE INFORMATION AND PROMOTION PROGRAM
OF AGRICULTURAL PRODUCTS IN THE THIRD COUNTRIES**

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1 Introduction and preliminary information

The **Consorzio Vini Alto Adige** (hereinafter the Contracting Authority), with registered office in Via Crispi 15, 39100 Bolzano (BZ) P. IVA 02676390210 and C.F. 94097990215, has submitted, as lead body of a proposing consortium, an information and promotion **Programme for a three-year period (2023-2024-2025)** in third countries under the EU Regulation No. 1144/2014 of the European Parliament and of the Council:

Topic: AGRIP-SIMPLE-2022-TC-OTHERS

Type of Action: AGRIP-PJG

Proposal number: 101095260

Proposal acronym: TASK-EU hear, Touch, See, dream: Keep alive the European quality

This programme was approved by European Commission Decision "C(2022)7918 final" of 9/11/2022 on the selection of simple programmes for the promotion of agricultural products for the year 2022 in accordance with Reg (EU) No. 1144/2014, published on 11 November 2022.

ANNOUNCES

Pursuant to the reference articles of Regulation (EU) No 1144/2014, Delegated Regulation (EU) No 2015/1829, Implementing Regulation (EU) No 2015/1831, a **call for tenders is launched for the selection of an Implementing Body , by means of an Open Competitive Procedure**, in charge of carrying out the actions (activities/initiatives) aimed at achieving the objectives set out in the Programme which will take place in the following target countries: **UNITED KINGDOM AND SWITZERLAND** and concerns the following quality products with Community denominations:

Product of origin recognition code - File number ¹	PRODUCT ²
PDO-IT-A0293 ³	ALTO ADIGE O DELL'ALTO ADIGE O SUDTIROL O SUDTIROLER DOP
PDO-IT-A0780 ⁴	ETNA DOP
IT/PDO/0117/0017	PECORINO ROMANO DOP

Economic operators who meet the requirements indicated in the aforementioned EU Regulations, as specified in the following paragraphs, are invited to submit a bid strictly following the instructions contained in these "Technical specifications".

1.1 Reference regulatory framework

The framework of regulatory references essential for the execution of the Program and this procedure includes:

- **Regulation (EU) No 1144/2014 of the European Parliament and of the Council of 22 October 2014** on information provision and promotion measures for agricultural products carried out on the internal market and in third countries and repealing Council Regulation (EC) No 3/2008;

¹ Fonte: <http://www.dop-igp.eu/flex/cm/pages/ServeBLOB.php/L/IT/IDPagina/1>

² Fonte: <https://www.qualigeo.eu/>

³ Fonte: <https://ec.europa.eu/info/food-farming-fisheries/food-safety-and-quality/certification/quality-labels/geographical-indications-register/>

⁴ Fonte: <https://ec.europa.eu/info/food-farming-fisheries/food-safety-and-quality/certification/quality-labels/geographical-indications-register/>

- **Commission Delegated Regulation (EU) 2015/1829 of 23 April 2015** supplementing Regulation (EU) No 1144/2014 of the European Parliament and of the Council on information provision and promotion measures for agricultural products carried out on the internal market and in third countries;
- **Commission Implementing Regulation (EU) 2015/1831 of 7 October 2015** laying down detailed rules for the application of Regulation (EU) No 1144/2014 of the European Parliament and of the Council on information provision and promotion measures concerning agricultural products carried out on the internal market and in third countries;
- Call for proposals published by the EXECUTIVE AGENCY FOR RESEARCH (REA) AGRI SIMPLE 2022 of 20 January 2022;
- **Guidance on the tender procedure** referred to in European Commission note DDG1.B5/MJ/DB D(2016)321077 of 7 July 2016;
- **Guidelines on the tender procedure** Decree of the Director General Ministry of Agricultural Food and Forestry Policies PQAI 05 Prot. No. 0526288 of 17/10/2022
- **Decision of the European Commission "C(2022)7918 final" of 9/11/2022** on the selection of simple programmes for the promotion of agricultural products for 2022 in accordance with Reg (EU) No 1144/2014, published on 11/11/2022

Consorzio Vini Alto Adige is not a body governed by public law within the meaning of Article 2, paragraph 1, point 4, of Directive 2014/24/EU and, therefore, as indicated in the aforementioned legislation, it is not required to apply the national rules implementing the European Directives on public procurement (in Italy, the Legislative Decree no. 50/2016). Contracting authority must select the implementing bodies through an open tender procedure in compliance with the principles of cross-border interest, transparency, publicity, impartiality, equal treatment of candidates, as well as the conditions previously indicated in the Guidelines of the European Commission and the Ministry of Agricultural, Food and Forestry Policies.

Therefore, the Directive 2014/24/EU and the Legislative Decree no. 50/2016 will therefore be applied only if and to the extent that they are expressly referred to in the tender documents (notice and technical specifications and related annexes).

The competitive procedure will in any case ensure compliance with the principles of non-discrimination, equal treatment, transparency, publicity, proportionality, clarity and consistency of the selection and award criteria provided for the purposes of the services requested and with the value of the same, best value for money and absence of conflicts of interest.

This procedure does not provide for a division into sections.

Indeed, the work packages and related activities are strictly connected to each other and to be carried out according to a logical and functional sequence, that can be optimized only by having a single contractor, who must ensure the coordination and integration of the work group and the different professional skills necessary and involved in the implementation of the service.

2. Program key information

2.1 Products to be promoted:

Product of origin recognition code - File number ⁵	Product ⁶
PDO-IT-A0293 ⁷	ALTO ADIGE O DELL'ALTO ADIGE O SUDTIROL O SUDTIROLER DOP
PDO-IT-A0780 ⁸	ETNA DOP
IT/PDO/0117/0017	PECORINO ROMANO DOP

2.2 Contracting Authority

Contracting Authority is Consorzio di Tutela Vini Alto Adige (as lead organisation of the project partnership composed of the same body, the Consorzio di tutela Etna DOC and the Consorzio Pecorino Romano DOP).

2.3 Target Countries

The target countries of the project: **Great Britain and Switzerland**

2.4 General objective:

The campaign is dedicated to **strengthening the competitiveness of the Union's agricultural sector, reflecting the General Objectives of Reg. (EU) No. 1144/2014 through improving the degree of awareness of PDO-labeled products, increasing their consumption and market share.** Through this project, focused on the AGRIP-SIMPLE-2022-TC-OTHER priority, the aim is **to strengthen awareness and recognition of the Union's agri-food quality schemes and encourage the consumption of related products on third countries, also in light of the changes that have emerged as a result of the COVID-19 pandemic.**

2.5 Specific programme objectives:

The promotional programme has the following specific objectives that together contribute to achieving the general objective defined above:

- Increased recognition within the target countries of the quality scheme of European PDOs by medium-high end consumers, opinion leaders, press and Ho.Re.Ca. retailers;
- Increase of awareness within the target countries towards PDO quality products by medium-high end consumers, opinion leaders, press and Ho.Re.Ca. retailers operators;
- Increase in the consumption of promoted products within the target countries through the Ho.Re.Ca. channel and selected events;
- Increasing the competitiveness of the quality products of the products being promoted through actions aimed at facing competition from New World wines and favouring the entry of the food products being

⁵ Fonte: <http://www.dop-igp.eu/flex/cm/pages/ServeBLOB.php/L/IT/IDPagina/1>

⁶ Fonte: <https://www.qualigeo.eu/>

⁷ Fonte: <https://ec.europa.eu/info/food-farming-fisheries/food-safety-and-quality/certification/quality-labels/geographical-indications-register/>

⁸ Fonte: <https://ec.europa.eu/info/food-farming-fisheries/food-safety-and-quality/certification/quality-labels/geographical-indications-register/>

promoted above all in the Ho.Re.Ca. channel (in particular, in the segment of quality Italian and international restaurants), in retail (specialised wine shops such as wine bars) and fine food shops.

2.6 Strategy

The TASK-EU basket of quality products indicated in the approved project proposal a comprehensive promotional strategy oriented to highlight the quality of Made in Europe products and the basket being promoted. The strategy must be tailored to the respective target markets and target groups.

Focus of the campaign must be the information and promotion of Made in Europe products through the basket of Made in Italy products highlighting, in particular, their skills in terms of **food safety, traceability, authenticity, labeling, nutrition and health aspects, animal welfare (for Pecorino Romano DOP), respect for the environment and sustainability.**

The communication activities of this program will mainly targets Ho.Re.Ca. operators and retailers, opinion leaders (journalists, influencers and bloggers) and final consumers.

The project strategy and main message should focus on:

- Informing the project target about the skills of Made in Europe products through the basket, increasing awareness about the intrinsic qualities that distinguish them;
- Building a dialogue that leads to increased recognition of the products and the properties that differentiate them from other (non-quality productions, especially in the UK where purchase price is a determining factor at the expense of product quality);
- Retain, through storytelling and IN-training the project targets.

The objectives that the project aims to achieve are based on a **promotional campaign that must be innovative and appealing.** Through storytelling and IN-Training, the aim is to educate the project target with respect to the origins, skills, excellence of flavor, and unique character of each testimonial product, thus enabling PDO productions to emerge as protagonists within the global agri-food scene.

2.7 Work Packages - WPs

Below are the WPs and activities that are to be present within the proposals, as detailed within the technical specifications:

- WP2 – Public relations;
- WP3 – Web site, Social media;
- WP4 – Advertising;
- WP5 – Communication tools;
- WP6 – Events;
- WP7 – Point of sales promotions (POS)

More details and information regarding these WPs are given in Section 5 of the specifications

2.8 Duration of the Program

The promotional campaign will run for 36 months (3 annuale phases).

2.9 Beginning of the activities

Activities have an indicative start date of February 01, 2023.

2.10 Budget for the Implementing body actions.

It should be noted that those interested in participating in this call for tenders **should submit a bid taking into consideration the total budget of € 1,247,361.92 (excluding VAT)**, including the costs and the compensation of the Implementing body (economic operator's fee). This amount must also include the economic operator's fee, while it does not include other charges that will be borne directly by the proposing organizations. The expected budget breakdown on the target countries is as follows:

Target countries	Total (€)
United Kingdom	742.091,84
Switzerland	505.270,08
Total	€1.247.361,92

2.11 Output and result indicators

Below is the table of output and result indicators included in the approved project proposal. This table of indicators should be of reference in the preparation of the technical bid that contain indication of the expected KPIs, as the promotion program at the conclusion of the three years will have to achieve the results indicated below. If the bidder's proposal identifies different indicators please detail them and provide objective justification

Output indicators and result indicators		
WP	Output indicators	Result indicators
Work Package2	<u>UNITED KINGDOM</u> 3 press releases 9 interviews 12 influencer partnerships 30 messages/content (post/story) 3 press reviews <u>SWITZERLAND</u> 3 press releases 9 interviews 6 influencer partnerships 30 messages/content (post/story) 3 press reviews	N. 270 articles generated from press release&the wine N. 15.900 contacts database press release N. 60 general articles from influencer partnership N. 16.000 contacts through press office&wine N. 99.900 impressions through dissemination on social media channels
Work Package3	<u>UNITED KINGDOM & SWITZERLAND</u> 1 website conception and creation (English and German version) 6 newsletters (English version) 6 newsletters (German version) 1 Facebook page with 279 posts 1 Instagram profile with 348 posts/stories 1 community management	N. 6.000 unique visitors to the website N. 30.300 contacts via e-newsletter N. 2.100 Instagram followers N. 2.100 Facebook followers N. 614 Facebook interactions N. 370 Instagram interactions N. 76.800 Facebook impressions N. 23.100 Instagram impressions

Work Package4.1	<u>UNITED KINGDOM</u> 3 media plans 18 ads published in professional and trade magazines 6 ads published in consumer or trade magazines <u>SWITZERLAND</u> 3 media plans 6 ads published in professional and trade magazines 6 ads published in consumer or trade magazines	N 458.000 circulation of professional trade magazines printed N 1.495.000 professionals reached N 1.026.000 consumer magazines print run N 3.330.000 consumers reached
Work Package 4.4	<u>UNITED KINGDOM & SWITZERLAND</u> 6 SEO campaigns	N. 30.000 professionals reached
Work Package5	<u>UNITED KINGDOM & SWITZERLAND</u> 2 communication concepts/key visuals 370 press kits 650 trade publications 800 info/culinary brochures 532 educational kits 8 product rolls ups 2 booths (POS Promotion) 1.850 information material folders	N. 1.780 consumers reached with material distribution N. 1.176 professionals reached with material distribution N. 3.000 indirect professional contacts reached through key visuals N. 24.200 direct contacts reached through communication - website e-newsletter N. 3.669.000 indirect contacts reached through trade show/visitor concept store/magazine readers
Work Package 6.1	<u>UNITED KINGDOM</u> 2 participations in international trade fairs <u>SWITZERLAND</u> 2 participations in international trade fairs	N. 6.800 operators reached
Work Package6.2	<u>UNITED KINGDOM</u> 3 collaborations with Chefs 6 "wine & food" meetings 5 meetings in schools 7 professional conferences/ B2B meetings <u>SWITZERLAND</u> 3 collaborations with Chefs 3 "wine & food" meetings 6 meetings in schools 6 professional conferences/ B2B meetings	N. 486 educated professionals N. 320 future students/educated students
Work Package 6.5	<u>UNITED KINGDOM</u> 3 study tours/visits <u>SWITZERLAND</u> 3 study/visit trips	N. 21 total participants UNITED KINGDOM N. 3 chaperones for 3 trips UNITED KINGDOM N. 21 total participant SWITZERLAND N. 3 chaperones for 3 trips SWITZERLAND
Work Package 7	<u>UNITED KINGDOM</u> 2 concept stores 30 days of organized promotion in stores <u>SWITZERLAND</u> 2 concept stores 20 days of organized point-of-sale promotion	N. 1.180 contacts (tastings) N. 24.800 indirect contacts (concept store visitors) N. 57.316 direct contacts N. 24.442 indirect contacts: advertising readers/visitors and concept store visitors N. 99.900 indirect contacts: communication impressions via social media channels

TECHNICAL SPECIFICATIOS

3 Object of the contract

3.1 General description of the service

The service consists of the execution of a part of the Information and Promotion Program called **TASK-EU** hear, Touch, tAste, See, dream: Keep alive the EUropean quality.

The Implementing Body will therefore have to ensure:

- The project development implementation of the agreed parts of the three-year Program, starting from the signing of the contract and in coordination with the beneficiaries;
- the operational activation of the promotional actions and activities foreseen for the period established by the Program, on the basis of the objectives set by the communication strategy, and aimed at achieving the expected results and impact, including through constant monitoring of the activities carried out and their effects, always in constant coordination with beneficiaries;
- the financial-administrative management of the agreed parts of the Program, including periodic technical reports and the final technical report, and all the documents necessary for reporting.

The service must be characterized by qualified technical and operational support, high quality of the products produced, and stand out for the innovativeness of the messages, the tools with which to convey them and the ways of engaging the target audience. The development and execution of the agreed activities of the Program must take place in a manner consistent with the general and specific objectives and communication strategy, taking into account the priorities and objectives of EU Reg. 1144/2014, ensuring a clear recognition of the Program and its promoters, always in constant coordination with the beneficiaries.

3.2 Method of execution

The Implementing Body must establish and have in place, for the duration of the contract, a Working Group, in accordance with the participation requirements, which is responsible for managing and implementing the Program. All activities of the Working Group must be agreed upon and shared with the Contracting Authority.

It is expected that one or more members of the Working Group will be available for periodic monitoring meetings at the headquarters of the Contracting Authority to provide operational support for those activities of the Plan that need to be carried out in close coordination with the relevant structure. Coordination and exchange of information with the Contracting Authority may also involve different and articulated modalities: meetings, telephone contacts, video calls, e-mail correspondence, exchange of materials and documents through online sharing systems.

3.3 Staff and working group

The Implementing Body must ensure the performance inherent in the entrusted services with integrated personnel with legitimate labor relations and having the professional and technical requirements appropriate to the employment and implementation of the project. The team must be characterized by a flexible organizational approach to respond to variations and/or unforeseen events that may arise during the course of the activities.

In particular, the dedicated staff must especially possess a range of skills in the following areas, listed by way of example but not limited to: communications, event and trade show organization, knowledge and experience of activities carried out in relation to target country markets, press office, project management, digital web and social management, graphics, etc.

Particularly, it must be able to define quantitative objectives a priori and propose projects consistent with these. Moreover, it must also provide for adequate monitoring of results.

Over the term of the Contract, the Implementing Body undertakes to:

- a) set up and make available an adequate Program team (the people who will directly take care of the work to be done), in compliance with the participation requirements, define in according to beneficiaries;
- b) agree and share all the team's activities with the Contracting Authority;
- c) assign suitable personal service, of proven ability, honesty, morality and proven confidentiality, which must maintain the most absolute confidentiality as to what it came to know in performing the service;
- d) guarantee the stability and continuity of the service in all circumstances, ensuring staff who are quantitatively and qualitatively adequate to the needs and complying with the contents of the technical bid;
- e) comply, in respect of its staff, with employment contracts for wages, regulations, social security and insurance;
- f) provide for a Program contact person who will attend the monitoring meetings at the Contracting authority's headquarters (these will have a periodicity defined by the Contracting Authority), to give operational support to the Program activities;
- g) make available all possible means of communication that can simplify the coordination, monitoring and control of the Program.

4 Duration of the service

The purpose of the contract for the service will be to carry out the activities indicated in these technical specifications, under the conditions set out therein, and will be signed subsequent to the signing, by the proposing party, of the Grant Agreement with the Member State and the Paying Agency (AGEA).

The Implementing body agrees to perform the services for the duration and within the timeframe stipulated in the Agreement, in these technical specifications, in the time schedule and, where not otherwise provided, according to the timeframe indicated by the Proposing Party/Contracting Authority. The service will be for the duration of the project and for a total of thirty-six months commencing from the date the contract is signed.

The Contracting Authority reserves the right to terminate the service with at least three months' notice by registered mail with return receipt or PEC in case of non-compliance with the provisions of this act.

The Contracting Authority reserves the right to request a postponement of the term of performance of the service for up to a maximum of an additional 6 months in order to ensure the completion of the activities envisaged in the Program, on equal economic terms.

5 Types of Activities and Initiatives in the Programme

The activities and initiatives (Work package - WPs) that will make up the promotional program are similar to the classic information and promotion of high quality agricultural and food and wine quality products, taking the issues to be discussed and the objectives listed above into account. They fall into the following categories:

- WP2 - Public relations
- WP3 - Website, Social media
- WP4 - Advertising
- WP5 - Communication tools

- WP6 - Events
- WP7 - Point of sales promotions (POS).

The aim is to expand the presence of the Consorzio Vini Alto Adige, Consorzio di Tutela Etna DOC, and Consorzio per la Tutela del Formaggio Pecorino Romano in the British and Swiss markets.

The target subjects of the activities will be the following:

- Sector operators, in particular, Ho.Re.Ca. and, specifically, the restaurant sector;
- Journalists, influencers, bloggers.
- Final consumers target countries;

Below are the indications regarding the information and promotional activities that will have to make up the proposals submitted under this selection procedure. It should be noted that the bidder, within and in accordance with the elements characterizing the WPs, below, is free to formulate, deepen and improve the proposed actions to enable the achievement of the objectives envisaged by the project.

Work Package2: Public relations			
Objectives			
<ul style="list-style-type: none"> ▪ O1) Increased recognition of the PDO quality scheme by specialized media, opinion leaders (influencers/bloggers), B2C media (print and online) through communication activities ▪ O2) Increased recognition of European PDOs and sustainability among defined target groups through communication activities 			
Activity 2.1 – Continuous PR activities (PR Office)			
Creation of at least No. 1 reference press release per year to announce campaign messages and highlights for both UK and Switzerland and designed for B2B media. Press releases should be disseminated through platforms that distribute press releases to abroad list of journalists			
Exclusive interviews proposed with selected prominent journalists covering the three relevant categories (wine, HO.RE.CA., upscale food industry). Interviews can be arranged by phone or in-person during educational workshops or at trade shows scheduled in the program.			
Partnerships with influencers: collaborations with prominent bloggers and influencers are a real pillar in the setting of PR activities, and allow to take advantage of existing communities by reaching target consumers. Influencers will receive a discovery and tasting box that includes information and tasting packs of the three representative products so that they can break new ground on UK and Swiss tables by creating eye-catching images, short videos and stories to share on social channels or by inspiring their communities with new recipe ideas and live sessions.			
Drafting messages/contents to be posted on consortia social channels: relevant news and messages (posts/stories) focusing on key program messages and relevant news (e-newsletter forwarding) will be drafted to be disseminated on consortia social channels. Consortia platforms are used to spread program messages and create synergies. The consortia platforms have followers and fans (B2B targets) from the program target countries that can act as multipliers of the program messages. The same messages will be disseminated in both markets.			
List and clipping analysis: at the end of each year, a compilation with all publications will be delivered along with an overall analysis.			
Target group:			
<ul style="list-style-type: none"> ✓ <i>Specialized and trade media:</i> most influential media in the UK and Switzerland (wine, HO.RE.CA., upscale food industry), representing the media of choice for professionals (distributors, importers, chefs, sommeliers, trade agents, restaurateurs, wholesalers, cheese traders, etc.). ✓ <i>Most relevant opinion leaders:</i> influencers, bloggers. ✓ <i>B2C media</i> (print and online). 			
The Implementing agency is requested to formulate its best proposal to facilitate the achievement of the planned objectives and detail its working methodology, individual activities by providing in the economic offer the detailed unit costs for each proposed activity			
Deliverables and estimated budget			
Timeline	YEAR1	YEAR2	YEAR3
Activity 2.1			
Sub – total Activity 2.1	UNITED KINGDOM: 17.449,60	UNITED KINGDOM: 17.449,60	UNITED KINGDOM: 17.449,60

	SWITZERLAND: 12.387,20	SWITZERLAND: 12.387,20	SWITZERLAND: 12.387,20
Total Work Package2	29.836,80€	29.836,80€	29.836,80€

Work Package3: Website & social media

Objectives

- **O1) Increased recognition of the PDO quality scheme** by consumers, specialized media, influencers/bloggers, B2C media through online communication activities
- **O2) Increased recognition of European PDOs** and sustainability by consumers, specialized media, influencers/bloggers, B2C media through online communication activities

Activity 3.1 – Website setup, updating, maintenance

Design and implementation of a website for the three-year duration of the program. The website will include information on European quality schemes and the three representative products, as well as recipes and information on upcoming events. A news section will host a regular newsletter. An English and a Swiss-German version will be implemented. The website is to be reachable from the websites of the individual project partners to promote visibility.

Drafting and sending of e-newsletters: they will collect relevant news focusing on four topics: in-depth coverage of European quality labels and related sustainable production methods, well-rounded information on flavors from unique European terroirs, important events, and testimonials from participating influencers, chefs and sommeliers. Newsletters will be sent to a specialized database of industry professionals and media.

Target Group:

- ✓ Consumers: consumers
- ✓ *Industry professionals* (HO.RE.CA. operators, sommeliers, chefs, media and opinion leaders).

The implementing agency is requested to formulate its best proposal to facilitate the achievement of the planned objectives and detail its working methodology, individual activities by providing in the economic offer the detailed unit costs for each proposed activity

Activity 3.2 – social media (accounts setup, regular posting)

Dedicated social channels Facebook, Instagram will include the creation of posts and stories, aimed at engaging consumers and operators, bloggers and influencers. Specific objectives of the activity are to increase interest, awareness and knowledge in consumers about European agricultural products and their distinguishing characteristics, disseminate direct news about the campaign and create a community.

Facebook: a key social channel because it allows reaching an audience that is both broad but highly targeted and geo-localized in the target countries. Content related to activities related to the individual country (fairs, events, in store promotion, etc.) will be posted. Management of the social includes content creation, photo and graphic design, social media marketing strategy and monitoring.

Instagram will play a key role in conveying the campaign messages through images and videos, which will tell the story of what is happening in the field. Space will be given to how products can be cooked to preserve their qualities with a view to sustainable consumption. Social management includes content creation, photo and graphic creation social media strategy and copywriting.

The social strategy to be adopted is to create cooperation and synergy between the social channels of the project and those of the Consorzi di Tutela project beneficiaries and with foreign "ambassadors" who will share the project, allowing the Consorzi themselves and the project's foreign advisors to become page editors themselves and also encouraging the creation of groups to foster interchange and specific discussion. Activating strong and direct social activity is central to activating product visibility not only in quantitative but qualitative terms.

The implementing organization is requested to formulate its best proposal to facilitate the achievement of the planned objectives and detail its working methodology, individual activities by providing in the economic offer the detail of unit costs for each proposed activity

Deliverables and estimated budget

Timeline	YEAR1	YEAR2	YEAR3
Total Work Package3.1	UNITED KINGDOM: 17.000,48 €	UNITED KINGDOM: 16.016,00 €	UNITED KINGDOM: 16.016,00 €
+3.2	SWITZERLAND: 11.288,48 €	SWITZERLAND: 10.304,00 €	SWITZERLAND: 10.304,00 €
Total Work Package3	28.288,96 €	26.320,00 €	26.320,00 €

Work Package4: Advertising

Objectives

- O1) **Increased recognition of the PDO quality scheme among** high-end end consumers and Ho.Re.Ca. professionals and the press through Advertising Activities
- O2) **Increased recognition of European PDOs** and sustainability among both end consumers and professionals through Advertising Activities
- O3) **Increased competitiveness** on target markets through advertising activities.

Activity 4.1 – Print

Strategic media plan for each target market, considering the level of distribution of the three PDO products and local activities. Priority will be given to a cross-media approach. Special attention will be paid to more content-oriented formats, such as advertorial placement or editorial partnerships with media.

UNITED KINGDOM: The media plan is to be more **B2B**-focused, but will evolve over the years from B2B to B2C respecting the evolution of ads and product availability.

SWITZERLAND: the media plan will have to include a **balanced mix of B2B and B2C media** (50/50). B2B media will focus on the HO.RE.CA sector.

Target Group:

Consumers: as defined target group,

Professionals: HO.RE.CA. operators, sommeliers, chefs, retailers such as wine merchants and fine dining stores

The implementing agency is requested to formulate its best proposal to facilitate the achievement of the planned objectives and detail its working methodology, individual activities by providing in the economic offer the detailed unit costs for each proposed activity

Activity 4.4 - Advertising

The advertising campaign aimed exclusively at online channels will focus on an SEO strategy designed to raise awareness among consumers and the industry about the campaign and the three PDO products, and to drive traffic to the campaign website in both the English and Swiss versions. A mix of search, display and remarketing.

Target group:

Consumers: medium to high end as defined target group,

Professionals: HO.RE.CA. operators, sommeliers, chefs, retailers such as wine merchants and gourmet shops

The implementing organisation is requested to formulate its best proposal to facilitate the achievement of the envisaged Objectives and to detail the work methodology, the individual Activities providing in the economic offer the unit cost details for each individual Activity proposed

Deliverables and estimated budget

Timeline	YEAR1	YEAR2	YEAR3
Sub-total Activity 4.1 + 4.4	UNITED KINGDOM: 52.192,00 €	UNITED KINGDOM: 52.192,00 €	UNITED KINGDOM: 52.192,00 €
	SWITZERLAND: 29.008,00 €	SWITZERLAND: 29.008,00 €	SWITZERLAND: 29.008,00 €
Total Work Package4	81.200,00 €	81.200,00 €	81.200,00 €

Work Package5: Communication tools

Objectives

O1) Increased recognition of the PDO quality scheme among both high-end end consumers and Ho.Re.Ca. professionals through information material and the press

O2) Increase in recognition of European PDOs and PDO sustainability among both end consumers and professionals through information material and the press

Activity 5.1 – Publications, media kit, promotional merchandise

The proposed visual for the program should be visible on the information materials below and will reach participants of WP 2 (PR) and WP 6/7 activities. The visual will also be depicted in the media of WP 3 (website), WP 4 (advertising), dedicated booths at trade fairs (WP 6) and concept stores (WP 7).

Information and promotional materials: specific publications will be created to provide relevant information to different target groups. Materials will be distributed both during campaign events and used in public relations activities (WP2) going to increase visibility during events. To operate in an eco-friendly and sustainable manner, all materials will be of high quality and sustainable solutions will be preferred wherever possible. Content and layout will be produced and prepared at the beginning of the campaign, while some productions will be modulated to ensure appropriate quantities, especially in case of necessary digitization of some events.

Press kit for press (PR/events/incoming): a publication providing information on European certifications, the three representative products and other key topics to be placed in the media.

Trade publication for B2B meetings and industry events: a publication highlighting the PDO quality standard, the three representative products, and key topics to enable the products to enter the shelves of specialty retailers, wine stores, and gourmet stores.

Info/culinary brochure for HO.RE.CA. professionals and food and cooking enthusiasts: a publication aimed at highlighting wine and food pairings and presenting recipes created by a local chef.

Educational Kit: for seminars and workshops including a digital presentation, product sheets, pens and recyclable notebooks for notes.

Folder for publications and educational materials: a folder for the above materials to facilitate delivery of materials during events.

Roll-up displays/Roll Ups for all events and trade shows.

Point-of-sale booth/stands: eye-catching booth for concept stores.

Target groups:

- all target groups of the promotional program.

The implementing agency is requested to formulate its best proposal to facilitate the achievement of the planned objectives and detail its working methodology, individual activities providing in the economic offer the unit cost details for each proposed activity.

Regarding the visual of the campaign, it is requested to provide at least two proposals of visual claim and declination on the above material

Deliverables and estimated budget

Timeline	YEAR1	YEAR2	YEAR3
Sub-total Activity 5.1	UNITED KINGDOM: 14.407,68€ SWITZERLAND: 13.065,92	UNITED KINGDOM: 5.004,16€ SWITZERLAND: 5.004,16€	UNITED KINGDOM: 5.018,72€ SWITZERLAND: 5.018,72€
Total Work Package5	27.473,60€	10.008,32€	10.037,44€

Work Package 6: Events

Objectives

- **O1) Increased recognition of the PDO quality scheme among specialised** media, opinion leaders, Ho.Re.Ca and retailers through events and exhibitions
- **O2) Increased recognition of European PDOs and PDO sustainability** among specialised media, opinion leaders, Ho.Re.Ca and retailers through events and exhibitions
- **O3) Increase of competitiveness** in target markets through events and exhibitions.

Activity 6.1 – Stand at trade fairs

Participation in major fairs and HO.RE.CA is planned. A dedicated booth will display the three PDO products and offer tastings of them. The fairs are to be selected based on quantitative criteria such as visitor potential, but also considering qualitative criteria such as visitor profile and interest.

Fairs in the United Kingdom: 1 International fair year 2 and 1 International fair year 3

Relevant fairs in Switzerland: 1 International fair year 1 and 1 International fair year 3

Target Group:

- Specialized media and opinion leaders, HORECA and retailers (specialty stores, high-end delicatessens, wine merchants).
- Hotels and wine schools

The implementing agency is requested to formulate its best proposal to facilitate the achievement of the planned objectives and detail its working methodology, individual activities by providing in the economic offer the unit cost details for each proposed activity.

Activity 6.2 – seminars, workshop, B2B meeting, training for trade/cooks, activities in schools

The implementing body will develop and organize various events of different types, taught by recognized and established experts.

Chef collaborations: for each market, identify a well-known local chef to become an ambassador for the program and the three products over the 3 years. The chef will be responsible for creating recipes and recommending wine and food pairings, and will serve as a speaker at the various events and educational sessions.

Activities in schools: to train future professionals, top schools will be involved with proposals for tailored learning sessions. Sessions will explain European PDO

brands in general with a product focus section that will focus more on wine or food depending on the type of school.

B2B Meetings: a more flexible format that brings together all B2B recipients and specialized media by offering a more business-oriented view to present the campaign, brands and representative products, while also creating the space and conditions for one-on-one professional meetings over lunch or dinner immediately following the presentation.

Food and wine sessions: to specifically target HO.RE.CA. professionals, a special wine and food pairing session will be developed

Target Group:

- Specialized media and opinion leaders, HO.RE.CA. and retailers (specialty stores, upscale delis, wine merchants);Hotels and wine schools

The implementing agency is requested to formulate its best proposal to facilitate the achievement of the planned objectives and detail its working methodology, individual activities by providing in the economic offer the unit cost details for each proposed activity.

Activity 6.5: Study trips to Europe

Each year the implementing body will organize **2 study tours** one from UK and one from CH by identifying at **least 7 leading professional** protagonists and organizing the itinerary and accompaniment during three days of travel. The protagonists will learn about the uniqueness of terroirs and discover fascinating landscapes and the philosophy of sustainable production methods behind PDO brands and the origin of each product. Since the three representative PDO products are located in different parts of Italy, visits to the regions may be arranged on a rotating basis, but moments of presentation and visibility all three products should be incorporated into the program of each visit.

The implementing agency is requested to formulate its best proposal to facilitate the achievement of the planned objectives and detail its working methodology, individual activities by providing in the economic offer the detailed unit costs for each proposed activity.

Deliverables and estimated budget

Timeline	YEAR1	YEAR2	YEAR3
Sub-total Activity 6.1 + 6.2 + 6.5	UNITED KINGDOM: 103.768,00 € SWITZERLAND: 117.600,00 €	UNITED KINGDOM: 151.536,00 € SWITZERLAND: 65.251,20 €	UNITED KINGDOM: 151.536,00 € SWITZERLAND: 115.920,00 €
Total WorkPackage: 6	221.368,00 €	216.787,20€	267.456,00 €

Work Package7: POS Promotions

Objectives

- **O1) Increased recognition of the PDO** quality scheme by mid-range consumers through in-store promotions
- **O2) Increased recognition of European PDOs and sustainability of PDOs** among both mid- and high-end consumers through in-store promotions
- **O3) Increase of competitiveness** in target markets through in-store events

Activity 7.1 – Tasting days

Exclusive collaborations for specific promotions with selected concept stores or gourmet markets will be pursued, with a focus on high food quality, sustainability, eco-responsibility, and transparent identification of origin, all values clearly linked to PDO brand standards. These new ideas bring together different distribution channels into one segment. Cooperations with these concept stores will be individual and will include product tasting in fine dining stores, the creation of dedicated menus at selected restaurants or wine-by-the-glass offerings.

Target group:

- HORECAs and retailers (specialty stores, upscale delicatessens, concept stores),
- *Consumers:* mid- to high-final consumers as per defined target, origin urban context

The implementing agency is requested to formulate its best proposal to facilitate the achievement of the planned objectives and detail its working methodology, individual activities providing in the economic offer the unit cost details for each proposed activity.

Deliverables and estimated budget

Timeline	YEAR1	YEAR2	YEAR3
Total for Work Package7	//	40.096,00€	40.096,00€

SELECTION PROCEDURE FOR THE PROGRAM IMPLEMENTING BODY

6. Requirements for participation in the tender

Economic operators may participate in this tender as individuals or as associated companies, provided that they meet the requirements laid down in the following articles.

It is forbidden for a tenderer participating in the tender in associated form to participate also in individual form.

In the case of associated participation, the subsequent requirements of Article 6.1 must be held by all participants at the time the tender is submitted.

6.1 Inexistence of causes of exclusion from participation in tender

Participation in this tender procedure is reserved to **economic operators** who on the date of submission of the offer declare that there are no reasons for their exclusion pursuant to Directive 2014/24/EU, or **reasons for exclusion related to:**

- criminal convictions;
- the payment of taxes or social security contributions;
- insolvency, conflict of interest or professional misconduct.

The non-existence of these reasons for exclusion must be attested by the attached declaration (**Attachment B**), signed by the legal representative.

In the event of a temporary grouping not yet established, each operator must produce the above declaration.

6.2 Economic and financial capacity requirements

The economic operator who intends to participate in this selection competition:

- must have achieved, in the five-year period 2017-2018-2019-2020-2021, a total global turnover of not less than Euro 2,500,000.00 (in letters: Euro two million five hundred thousand/00) net of VAT, resulting from the VAT declarations or equivalent tax within the EU;
- must enclose the declaration of the Banking Institute of possession by the economic operator of the financial means necessary to guarantee the execution of the actions envisaged by the Program (suitable bank references);
- must attach a copy of the latest approved financial statements and/or VAT declaration;
- must enclose the Chamber of Commerce (CCIAA) certificate or registration in a commercial register kept in the Member State where the economic operator is based.

Possession of these requirements must be attested through the attached declaration (Annex B), signed by the legal representative. These requirements must be possessed by the economic operator as a whole, or as an entity in a temporary business grouping.

6.3 Technical and professional capacity requirements

The economic operator (single or in a temporary business grouping) who intends to participate in this selection tender must:

- have carried out, in the five-year period 2017-2018-2019-2020-2021, services similar to those covered by the

tender for a total amount of not less than € 1,300,000.00 (in letters: € one million three hundred thousand/00) net of VAT;

- attach a list of the main services performed (company CV);
- attach CVs of personnel employed, in the eventual execution of the Program, from which proven experience in services similar to those covered by the tender.

Similar services include (by way of example only and not limited to):

- management of complex international promotion projects/programs;
- management of groupings of companies and coordination of work groups;
- planning and management of public contribution programs;
- event and incoming organization activities;
- press office management;
- communication activities, PR, etc. also online;
- information material creation;
- promotional videos creation;
- promotional activities in the agri-food industry.

These requirements must be certified by means of the attached declaration (Annex B) signed by the Legal Representative of the proposing party and the sending of the CVs of the professional figures envisaged in the execution of the assignment. These requirements must be possessed by the economic operator or by the temporary grouping of companies as a whole, except that in the latter case the agent must in any case possess the requirements and perform the services in a majority measure.

7. Selection committee and award criteria

The jury is appointed after the deadline for submission of tenders and consists of an odd number of up to 7 members, experts in the specific field to which the subject of the contract relates.

The jury is responsible for evaluating the technical and economic offers of the tenderers.

The sole manager of the procedure (RUP) is assisted by the jury for the purpose of verifying the documentation produced and the anomaly of the bids.

The contract will be awarded on **the basis of the most economically advantageous bid**, according to the distribution of scores described below, but also taking into account quality criteria.

The quality aspects of the service and the economic offer will be taken into account jointly: Therefore, **the total 100 points will be evaluated** in the following order:

1) TECHNICAL OFFER: max 85 points	MAXIMUM POINTS ACHIEVABLE: 100 being the max score
2) ECONOMIC OFFER: max 15 points	

The **Evaluation Committee** will proceed with the evaluation of the qualitative elements on the basis of the evaluation elements indicated in the table below.

7.1 – Evaluation and quality of technical offer

The technical score of **maximum 85 points** will be awarded on the basis of clarity, completeness, consistency, with respect to what is required in the tender documents, in application of the following criteria and sub-criteria evaluated as shown in the following table.

TECHNICAL OFFER: MAXIMUM 85 POINTS		
Criteria	Sub criteria	Max scored
1. QUALITY OF THE TECHNICAL OFFER - OVERALL STRATEGY	Quality of the articulation of the overall strategy and of the activities, and their consistency with the specifications provided in the contract and in the reference Program	Up to 5 points
	Ability to produce the expected results and achieve the objectives set in the Program	Up to 5 points
		Maximum 10
2. QUALITY OF THE TECHNICAL OFFER – PROJECT ACTIVITY	Creativity and innovation of the communication tools proposed (e.g. press office management, creation of the promotional video, creation of the information material and the online communication, organization of events and incoming, etc.)	Up to 7 points
	Effectiveness and ability of the expected outputs to communicate the Program message	Up to 7 points
	Quality of graphic design and concept	Up to 7 points
	Quality of the proposal in identifying the target group and positioning in target markets	Up to 3 points
	Quality of the working group dedicated to communication, graphics, event management, etc. within the Programme (evaluation of the CVs of the dedicated work group)	Up to 6 points
		Maximum 30
3. QUALITY AND EFFECTIVENESS OF THE METHODS OF EXECUTION OF THE PLANNED ACTIONS	Congruence in the way actions are implemented and executed with respect to the way activities and initiatives are carried out under the Programme	Up to 18 points
	Adequacy of the planning in terms of coherence with the objectives of the communication strategy and coherence with respect to the planning timetable: in particular, coherence between the proposed timetable of activities and the effectiveness of the implementation of the individual actions, also in relation to the professional resources involved	Up to 7 points
	Adequacy of control mechanisms to monitor the correct economic and financial execution of the project, the respect of the timetable and of the output and result indicators, and the quality and effectiveness of the modalities of implementation of the activities foreseen in the Programme	Up to 7 points
	Quality of project coordination (CV evaluation of the professional in charge of coordinating project activities)	Up to 6 points
	Proposed additional service-enhancing services/activities	Up to 3 points
	Mode of interaction/assistance provided to beneficiaries	Up to 4 points
		Maximum 45
Maximum points Technical offers:		85

For the determination of the obtained scores of the technical offer in relation to the respective criteria and sub-criteria indicated above, the method of discretionary attribution by each tender commissioner will be used by applying a coefficient (to be multiplied then by the maximum score attributable in relation to the criterion), varying between 0 and 1. Therefore, each commissioner will attribute a reasoned score to each offer according to the following grid:

JUDGMENT	COEFFICIENT
not verifiable	0
evaluation: insignificant	0.1
evaluation: just enough	0.2
evaluation: enough	0.3
evaluation: between enough and fair	0.4
evaluation: fair	0.5
evaluation: between fair and good	0.6
evaluation: good	0.7
evaluation: between good and very good	0.8
evaluation: very good	0.9
evaluation: excellent	1.0

For each sub-criterion, once each commissioner has attributed a coefficient to each competitor, the average of the coefficients attributed by the adjudicating commission will be calculated, with a value of 1 being attributed to the highest coefficient among the bidders and consequently repartitioning all other coefficients.

7.2 Evaluation of the economic offer

The economic offer must be structured in such a way that the different elements indicated in the following table can be evaluated.

ECONOMIC OFFER: MAX SCORE 15		
Evaluation element	Motivational criterion	MAX SCORE
ECONOMIC OFFER max 15 points	<u>Economic analysis:</u> Economic analysis of the proposed initiatives, according to market prices	Up to 7 points
	<u>Fee:</u> Evaluation of the appropriateness of the fee, expressed in man/days, required for the implementation of each action, based on the cost of each action and the expected benefits	Up to 8 points
Maximum achievable score		15

As for the **economic offer for the activities** (maximum of 7 points out of 100) the score will be assigned on the basis of the following formula:

“Economic offer for activities” score considered =
$$\frac{\text{Offer X}}{\text{Max Offer}} \times 7$$

where:

Maximum bid: is the highest economic offer for the activities (SUBTOTAL ACTIVITIES) among those submitted;

Offer X: is the economic offer for the activities (SUBTOTAL ACTIVITIES) of the economic operator considered.

As concerns the economic offer for the fee of the participating economic operator (max 8 points out of 100), the score will be awarded based on the following formula:

Economic offer score for the economic operator fee considered =
$$\frac{\text{Minimum fee \%}}{\text{Fee \% x}} \times 8$$

where:

Minimum fee%: is the percentage on the economic offer for the lowest participating economic operator fee among those submitted;

Fee% X: is the percentage on the economic offer for the economic operator fee considered.

For the purposes of attribution and calculation of scores, any non-integer values will be rounded to the second decimal place.

Upside bids are not permitted.

The opening of the PEC C (certified email) carrying the economic offer will take place at the end of the evaluation work carried out by the aforesaid Commission.

Based on the scores assigned to the offers, the ranking will be drawn up.

The award will be made to the competitor who has submitted an offer which, having all the minimum mandatory requirements, will result in having a highest overall score (technical offer score + economic offer score).

In the event of a tie score, the contract will be awarded to the competitor who will receive the highest score in the technical offer. In the event of a tie between the economic offer and the technical offer, a draw will be held.

The Contracting Authority is not required to pay any compensation to competing companies, for any reason whatsoever, for the bids submitted.

Once the required checks on the possession of the prescribed requirements have been completed, the contract will be awarded.

The award immediately binds the entrant entrusted with the tender, while the Contracting Authority will be definitely committed only when, pursuant to the law, all the consequent deeds necessary for the performance of the tender will have achieved full legal effect.

In the event that the assignee is not present for the stipulation of the contract or in which the falsity of the declarations given is ascertained, the Contracting Authority reserves the right to confer the task on the following economic operator in the ranking, having carried out the necessary checks.

Consorzio Vini Alto Adige will proceed with the award even if only one valid offer is submitted, provided it is fair.

The Contracting Authority reserves the right not to proceed with the award if no offer is convenient or suitable in relation to the subject of the contract.

The outcome will be notified via PEC (Certified email) to the participants and will be published on the Consorzio Vini Alto Adige web site

8 Presentation of proposals

8.1 Method of submitting proposals

The economic operators who are interested in participating in the call for tenders for the selection of the Implementing Body must, under penalty of exclusion, send all the necessary documentation **through 3 different certified e-mails (PEC)** identifiable by the description given in the "Subject" field, as follows:

PEC A - administrative documentation, which must contain:

- a) application to participate in the procedure according to the form in Annex A, completed and signed by its legal representative;
- b) declarations required according to the form in Annex B, completed and signed by its legal representative;
- c) signatory(s)' identity document;

- d) declaration of the Bank of the possession of the necessary financial resources to guarantee the execution of the actions provided in the Program (suitable bank references);
- e) Chamber of Commerce report or registration in a register of companies kept in the Member State where the economic operator is established;
- f) CV(s) of the economic operator(s) interested in participating in the selection procedure and submitting their offer (company's CV);
- g) copy of the latest approved budget and/or VAT return.

PEC B - technical offer, which must contain:

- a) technical report containing a detailed description of the activities, using the references indicated in the following chapter: PROCEDURE FOR THE PREPARATION OF THE TECHNICAL OFFER – CERTIFIED EMAIL B;
- b) CVs of the working group;
- c) presentation of the working group and professionals/figures with their skills,
- d) Timetable

PEC C - economic offer, which must contain the indication of the economic offer for the activities (SUBTOTAL ACTIVITIES) and the fee of the economic operator considered according to the model described in the following chapter: METHOD OF PREPARING THE ECONOMIC OFFER – CERTIFIED EMAIL C.

In the following sections (Method of preparation of the technical offer and Method of preparation of the economic offer) indications are provided on how the technical and economic offer should be drawn up.

The documentation must be written in Italian, must be submitted in electronic format – a non-editable, printable and copyable PDF and an .xls files - by certified email, by the participant **in the tender no later than the 19th December 2022- local time 12.00**

All documents must be signed by the legal representative of the economic operator participating in the selection procedure; in the case of a **temporary grouping already established**, it must be signed by the legal representative of the competitor designated as the Group Leader; in the case of a **temporary grouping to be established**, the offer must be signed by all the parties that will make up the aforementioned grouping.

CERTIFIED EMAIL address to which proposals must be sent within the aforementioned deadline:
vinialtoadige.progetti@pec.konmail.net

It is required to send three separate certified email transmissions [**3 certified email messages (PEC)**].

The subject line of each PEC must be marked as follows:

NOTICE OF SELECTION BY OPEN COMPETITIVE PROCEDURE FOR THE SELECTION OF A BODY IN CHARGE OF THE IMPLEMENTATION OF THE PROGRAMME OF INFORMATION AND PROMOTION OF AGRICULTURAL PRODUCTS - THIRD COUNTRIES - NOT TO BE OPENED.

The subject of each certified email shall also bear the additional identification:

- **PEC A - administrative documentation;**
- **PEC B - technical offer;**
- **PEC C - economic offer.**

8.2 Procedure for opening tenders

The sessions of the Evaluation Commission will take place remotely via a videoconferencing platform and the relative procedures will be communicated to the bidders. Should the epidemiological situation of the moment allow it, the sessions of the Evaluation Commission will be carried out in the presence, however in compliance with the health requirements in force at that time.

Date: the 19th December 2022

Local time: 14.00

Public session conducted in smart working mode, for the opening of the PEC A and verification of the administrative documentation.

The evaluation of the technical bids will take place in one or more reserved sessions remotely via electronic videoconference platform by the Selection Committee indicated in Article 7. The work of the Selection Committee will be duly recorded with an indication of the reasons supporting the assessments made.

In addition, as already indicated in Art. 7, the economic offer will be evaluated in a reserved session remotely by means of a videoconference electronic platform (subject to the above-mentioned indications), at the conclusion of the evaluation of the technical offers carried out by the aforementioned Commission.

Any questions and/or clarifications regarding the execution of the tender may be addressed EXCLUSIVELY by e-mail to **Alexandra Cembran: alexandra.cembran@suedtirolwein.com**, which will be answered exclusively in writing.

Any verbal requests or requests forwarded by other means than the one indicated will not be taken into consideration.

Communications from the Tender Body will be made by PEC (certified electronic mail) to the certified electronic mail address indicated by the tenderer.

9 Tender documents

9.1 Indications regarding irregularities in administrative documentation - PEC A

The shortcomings of any formal element of the application can be amended through requests for additions and/or documentation from the Consorzio, where appropriate. Particularly, in the event of lack, incompleteness or any other essential irregularity of the documentation submitted, with the exclusion of those relating to the economic offer and the technical offer, the Contracting Authority assigns the bidder a term, not exceeding ten days, so that the necessary declarations are made, integrated or regularized, indicating their content and the persons who must make them. In case of fruitless expiry of the regularization period, the competitor is excluded from the tender. Shortcomings in the documentation that do not allow the identification of the content or the person responsible for the same constitute essential irregularities that cannot be remedied.

9.2 Method of preparation of the technical offer - PEC B

Technical report

The operator must indicate his initiatives for each point listed below and the related method of execution and achievement of the results.

1. Overall strategy

The operator must articulate its proposal by proposing the implementation strategies it considers most effective in pursuing the project objectives using the following indications:

- a) demonstration of the working group's capacity to produce the results envisaged by the project;
- b) articulation of the overall strategy: consistency between the overall project strategy and the individual activities;
- c) ways of achieving the specific objectives and results set out in the project.

2. Activities

The operator must articulate its proposal by proposing the types of activities and implementation methods it considers most effective for achieving the project objectives using the indications below:

- a) description of the activity plan: proposal of the implementation methods and contents of the promotional plan drawn up in order to achieve the required objectives, proposal of the graphic design and concept and content of the promotional messages and their consistency with the activity plan and the ability of the working group to effectively implement the actions, indications of KPIs attends;
- b) presentation of the working group responsible for carrying out the communication and promotion activities.

3. Methodological approach and articulation of the activities

For each type of activity listed in the technical specifications, the specific interventions to be implemented to achieve the project objectives must be described. The activities and the relative interventions must be consistent with the strategies proposed for the individual target countries and with the relative target groups identified, and must be declined in accordance with the points indicated below:

- a) modality of implementation of the actions: description of the operational modalities used for the provision of services and their consistency with the aims and objectives of the proposed communication campaign and with the Programme (indications of KPIs attends);
- b) time schedule: adequacy of time and resources, as set out in the time schedule and its consistency with the Programme, to be spread over a three-year period
- c) consistency with the overall strategy and implementation methods of the interventions proposed above;
- d) description of the monitoring mechanisms and proper implementation of the activities;
- e) presentation of any additional activities/services proposed and the assistance arrangements provided to the Consortium;
- f) description of the working group and specific responsibilities in relation to the various activities.

The previous points must be organized and presented according to the criteria and sub criteria described in article 7 and by activity.

The **technical report** with the strategic, implementation and methodological proposals must be included in the **PEC B - Technical offer**.

9.3 Method of preparation of the economic offer - CERTIFIED EMAIL C (PEC C)

Economic Offer

The costs must be detailed for each action and type of activity necessary for the organization and implementation of the service (**SUBTOTAL ACTIVITIES**) with an indication of the **VALUE OF THE ECONOMIC OPERATOR'S FEE** considered according to the following scheme that must be completed for each single year of the Program and for each single countries (Year 1, Year 2 and Year 3).

The economic operator's fee must be highlighted.

Below is an **example table for Year 1**. This table must also be completed for each individual year and for each single countries of the Program (Year 1, Year 2 and Year 3)

TARGET COUNTRY				
YEAR				
Activities description	Cost item description	Number or quantity	Unit value	Total	Expected kpi
WP 2 – PUBLIC RELATION			€	€	
WP 2.1			€	€	
WP 2.2			€	€	
.....			€	€	
SUBTOTAL ACTIVITY WP 2 FOR YEAR 1			€	€	
ECONOMIC OPERATOR FEE WP 2			€	€	
WP 3 – Web site, social media			€	€	
.....			€	€	
.....			€	€	
.....			€	€	
SUBTOTAL ACTIVITY WP 3 FOR YEAR 1			€	€	
ECONOMIC OPERATOR FEE WP 3			€	€	
WP 4 - Advertising			€	€	
.....			€	€	
.....			€	€	
.....			€	€	
SUBTOTAL ACTIVITY WP 4 FOR YEAR 1			€	€	
ECONOMIC OPERATOR FEE WP 4			€	€	
WP 5 – Communication tools			€	€	
.....			€	€	
.....			€	€	
.....			€	€	
SUBTOTAL ACTIVITY WP 5 FOR YEAR 1			€	€	
ECONOMIC OPERATOR FEE WP 5			€	€	

WP 6 – Events			€	€	
.....			€	€	
.....			€	€	
.....			€	€	
SUBTOTAL ACTIVITY WP 6 FOR YEAR 1			€	€	
ECONOMIC OPERATOR FEE WP 6			€	€	
WP 7 – POS			€	€	
.....			€	€	
.....			€	€	
.....			€	€	
SUBTOTAL ACTIVITY WP 7 FOR YEAR 1			€	€	
ECONOMIC OPERATOR FEE WP 7			€	€	
A) GENERAL SUBTOTAL ACTIVITY FOR YEAR 1 (WP2 + WP3 + WP4 + WP5 + WP6 + WP7)			€	€	
B) GENERAL SUBTOTAL ECONOMIC OPERATOR FEE FOR YEAR 1 (WP2 + WP3 + WP4 + WP5 + WP6 + WP7)			€	€	
*A + B) ECONOMIC OFFER TOTAL COUNTRY TARGET ITALY FOR YEAR 1			€	€	

The remuneration of the Executing Organisation (*economic operator's fee*) shall be a maximum of 12% of the total cost related to the actions (SUB-TOTAL GENERAL ACTIVITY).

The economic operator must also complete the following summary table given as an example.

TARGET COUNTRY	UNITED KINGDOM			SWITZERLAND			Total	% fee
	Year 1	Year 2	Year 3	Year 1	Year 2	Year		
A) GENERAL SUBTOTAL ACTIVITIES FOR EVERY SINGLE YEAR (SUB TOTAL ACTIVITY WP2 + SUB TOTAL ACTIVITY WP3 + SUB TOTAL ACTIVITY WP4 + SUB TOTAL ACTIVITY WP5+ +SUB TOTAL ACTIVITY WP6+ SUB TOTAL ACTIVITY WP7	€	€	€	€	€	€	Enter addition Year1 + Year 2+ Year3	
B) GENERAL SUBTOTAL FEE ECONOMIC OPERATOR FOR EACH SINGLE YEAR (ECONOMIC OPERATOR FEE WP2 + WP3 + ECONOMIC OPERATOR FEE WP4 + ECONOMIC OPERATOR FEE WP5 + ECONOMIC OPERATOR FEE WP6 + SUBTOTAL ACTIVITY WP7)	€	€	€	€	€	€	Enter addition Year1 + Year 2+ Year3	Enter value B) / A) in% (with value approximated to max 3 digits after the comma)
A + B) TOTAL ECONOMIC OFFER TARGET COUNTRIES FOR EVERY SINGLE YEAR	€	€	€	€	€	€	Enter addition Year1 + Year 2+ Year3	

*NB: THE TOTAL ECONOMIC OFFER must be at most equal to the total amount of this selection procedure (€ 1.247.361,92 excluding VAT).

The set of tables shown above as an example (6 tables relating to the 3 project years for each target country + 1 summary table), will form the economic offer and must be included in PEC C - Economic offer.

In addition, the economic offer must be provided in electronic format, both in .pdf and .xls format.

10 Additions in the event of deficiencies

Deficiencies in any formal element of the application, and in particular the absence, incompleteness and any other essential irregularity of the elements, with the exclusion of those relating to the substantial content of the economic offer and the technical offer, may be remedied by means of the integration procedure referred to in this article.

An essential irregularity may be remedied where it is not accompanied by a substantial deficiency in the requirement for the demonstration of which the omitted or irregularly produced documentation was intended. Subsequent correction or supplementation of documentation is permitted where it enables the existence of pre-existing circumstances to be attested, i.e. requirements for participation and documents/elements accompanying the tender. Specifically, the following rules apply

- failure to meet the prescribed participation requirements cannot be rectified by means of supplementation and is a cause for exclusion from the tender procedure;
- the omission or incomplete or irregular presentation of declarations on the possession of the participation requirements and any other lack, incompleteness or irregularity in the application may be remedied, with the exception of false declarations
- the non-submission of elements accompanying the tender or of conditions for participation in the tender, which are relevant at the tender stage, may be remedied, only if pre-existing and demonstrable with elements of a certain date prior to the deadline for submitting the tender
- deficiencies in the signature of the application to participate, the required declarations and the tender may be remedied.

For the purposes of the integration procedure, the tenderer shall be given a reasonable period of time - not exceeding ten days - in which to make, supplement or regularise the necessary declarations, indicating their content and the persons who must make them.

In the event of failure to comply with the deadline, the competitor shall be excluded from the procedure.

Should the competitor produce declarations or documents that are not perfectly consistent with the request, further clarifications or explanations may be requested, limited to the documentation submitted at the integration stage, setting a time limit under penalty of exclusion.

11 Work group

The assignee assumes all legal insurance and social security charges, undertakes to comply with the regulations in force on the subject of occupational safety and remuneration of employees and, in general, undertakes to comply with all the obligations deriving from laws, regulations, collective agreements and supplementary company agreements on labour relations, vis-à-vis all the persons who carry out activities on behalf of the same, both under a full or an occasional employment relationship, with any type of contract.

The assignee assumes all responsibility for damages or injuries that may arise to said persons or be caused by such persons in the performance of any activity, directly or indirectly, inherent in the services covered by this procedure.

12 Obligations of the Implementing Body

The contractor/implementing body shall be responsible for

- the performance of the services covered by the tender, in agreement and cooperation with the Contracting Authority and in full and unconditional acceptance of the contents of these specifications;
- the observance of every indication contained in these specifications, even if not specifically referred to in this article, of the rules and regulations in force at both national and Community level, as well as those that may be issued during the contractual period (including regulatory provisions and municipal ordinances), with particular regard to those relating to hygiene and safety and in any case pertaining to the subject matter of the contract and its execution;
- the Implementing body assumes full technical and financial responsibility for the actions referred to in articles 3 and 5, including that relating to their compatibility with the applicable regulations of the European Union, the project target countries and the applicable competition rules
- the Implementing body shall supervise the administrative/financial monitoring of the project, including the keeping of records and supporting documents, the transmission of deliverables and the preparation of actions and payment requests.

The Implementing Body must:

- for a period of three years after payment of the balance, keep records and supporting documents to demonstrate the proper implementation of the action and the costs declared eligible;
- if checks, audits, investigations, litigation or legal proceedings under the agreement are in progress, keep the records and supporting documents until these procedures have been completed;
- make the above documents available upon request or in the context of controls, audits or investigations;
- make available to the Contracting Authority all the documentation produced during the performance of the service, as well as all the data processed, used or collected during the performance of the activities, including the data necessary for a proper evaluation of the effectiveness of the programme, in accordance with the regulatory framework of reference and all the information required for the preparation of periodic and final reports;
- keep the original documents.

13 Confidentiality and non-disclosure

The successful tenderer may not use, directly or indirectly, either for his own benefit or for that of third parties, the mandate entrusted and the information he will become aware of in relation to it and this also after the expiry of the contract. To this end, the successful tenderer may not disclose, communicate or disseminate the information and data of which it will become aware during the performance of the activities.

The assignee undertakes to respect, in the performance of the activities covered by this procedure, all the principles contained in the current regulatory provisions, relating to the processing of personal data and in particular those contained in the Italian Legislative Decree no. 196/2003, as amended and in the Regulation (EU) 2016/679 of the European Parliament and of the Council of 27 April 2016 containing the European General Data Protection Regulation (hereinafter also "GDPR") and to ensure that personal, asset, statistical, registry data and/or of any other kind, of which it will become aware as a result of the services rendered, in any way acquired, are considered confidential and treated as such, while at the same time ensuring transparency of the activities performed.

The service provider must formally commit himself to give instructions to his staff so that all data and information are treated in compliance with the applicable legislation.

The contractor of the service undertakes to use the aforementioned data and information exclusively for the purposes and within the scope of the activities provided in this specification.

14. Conflicts of interest

The contracting Authority will take appropriate measures to prevent, identify and effectively remedy conflicts of interest in the conduct of this selection procedure so as to avoid any distortion of competition and ensure equal treatment of all economic operators, in compliance with the principles set out in the Procurement Code and, to the extent applicable, Article 24 of Directive 2014/24/EU and Article 42 of Legislative Decree 50/2016.

15 Breach and termination of contract

The Contracting Authority has the right to check and verify the proper execution of the service with the help of appointees chosen at its discretion. Moreover, the Contracting Authority has the right to challenge the services rendered that do not comply in whole or in part with the specification requirements or the offer proposed in the tender and in any case according to the provisions of the contract governing the service signed between the parties. In the event of a dispute, the supplier may request the replacement of staff not adequate to carry out the services. In addition to the provisions of article 1453 of the Italian Civil Code for cases of non-fulfilment of contractual obligations, the contract is terminated, pursuant to and for the purposes of article 1456 of the Civil Code, subject to compensation for damages in the following cases:

- in the case of transfer of all or part of the contract;
- in the event of a violation of the data protection and confidentiality obligations, of such gravity that it does not allow the further continuation of the contractual obligations;
- in the case of duly ascertained serious infringements of safety regulations and any other obligation deriving from employment relationships pursuant to the current regulations (in particular with reference to the regularity of the contribution payments attested by DURC certificate, etc.), as well as for failure to comply with contractual or legal obligations, regarding wages, retirement or social security and insurance benefits in favour of the staff and collaborators employed in the service;
- in the case of unjustified suspension of the service;
- in the case of serious non-fulfilment of the contracted services provided for by the program and other obligations arising from these specifications and/or the contract and/or the time schedule as well as for failure to comply with project guidelines presented and any additional indications regarding the quality of the service, contested in writing by the Contracting Authority and not resolved within the granted deadline;
- in the event that the Implementing Body has been subjected to bankruptcy or similar procedures limiting the economic and business capacity by the competent bodies;
- in any case, in cases of violation of current regulatory provisions.

Any missed disputes and/or previous breaches, for which the Contracting Authority has not deemed it necessary to make use of the clause itself and/or acts of mere tolerance in the face of previous breaches, cannot be understood as a waiver of making use of the clause referred to in this article for any kind of past breaches by the contractor.

In the event of termination, the Contracting Authority reserves all rights to compensation for damages suffered and in particular reserves the right to demand from the Implementing Body the reimbursement of any expenses in excess of those it would have incurred in the presence of a regular fulfilment of the contract.

In any case, the Implementing Body, in the event of termination, will only be entitled to reimbursement of expenses and the activity actually carried out up to that moment.

The Contracting Authority shall also be entitled to defer the payment of any balance due under the final settlement account until the quantification of the damage to be paid by the Implementing body.

16 Relations between the contractor and the Administration of the Commissioning Body

The winning economic operator must appoint a contact person in charge of the service, who will be obliged to work closely with the Contracting Administration staff and the Sole manager of the procedure (RUP) in the implementation of the service under the contract and the operational resolution of issues related to particular business needs.

17 Transfer and subcontracting

The successful tenderer is obliged to perform the services included in the contract on its own account and the same may not be assigned under penalty of nullity, except in the cases provided for by law.

Subcontracting is permitted if at the time of submission of the tender the tenderer indicates the parts of the service/supply he intends to subcontract.

In the event of failure to indicate the parts to be subcontracted, subcontracting is prohibited.

The successful tenderer and the subcontractor are jointly and severally liable towards the contracting authority for the performance of the services covered by the subcontract.

In any case, subcontracting is permitted within the limits and according to the procedures indicated in Article 105 of Legislative Decree 50/2016 as amended and supplemented, insofar as applicable to this selection procedure.

18 Method of payment

The award amount will be paid as follows:

- a) deferred instalments on the basis of states of service progress submitted at the deadlines stipulated in the Program and the relevant regulations, up to a maximum of 80% of the contractual amount, following the submission of regular invoices and after checking the accounting and fiscal regularity of all documentation and, in particular, the appropriate reports on the activities carried out and the products issued and the relevant reporting of expenses incurred in accordance with the relevant regulatory provisions
- b) settlement of the contract amount at the end of all the activities envisaged following the presentation of a regular invoice, to which a final report must be attached on the activities carried out and the products released and the related reporting of the expenses incurred according to the relevant regulatory provisions.

The invoice, together with the foreseen documentation, must be submitted to the Contracting Authority and to the Sole Manager (RUP) in order to obtain the approval concerning the correct execution of the contract.

19 Inspections

The Contracting Authority has the right to check and verify the proper execution of the service through appointees chosen at its discretion. Since the contract is financed with European Union resources, inspections can be arranged by the competent services of the European Union and/or national authorities.

20 Contractual expenses

Revenue stamps, stipulation, registration and any other ancillary expense for the contract are charged 50% to the Implementing Body and the remaining 50% to the Contracting authority.

21 Access to the documentation of the selection procedure

Access to the documentation of the procedure is permitted in accordance with the provisions on the right of access to administrative documents as follows:

It is deferred

- a) in relation to the list of persons who have submitted tenders, until the deadline for submitting them;
- b) in relation to the tenders, until the awarding of the contract;
- c) in relation to the procedure for verifying the anomaly of the tender, until the awarding of the contract.

It is prohibited

- (d) to information provided as part of the tender or in justification thereof which, according to a reasoned and substantiated statement by the tenderer, constitutes technical or trade secrets
- (e) confidential reports by the construction manager and the acceptance body on the applications and reservations of the party performing the contract.

In relation to the case referred to in sub-paragraph (d), access is permitted to the tenderer for the purpose of defending its interests in relation to the contract award procedure before the courts.

22 Litigation

For the settlement of all disputes that may arise in relation to this procedure, the place of jurisdiction is Bolzan, in the forms and methods provided for by law.

23 Rights of ownership and use

The rights of ownership and/or use and economic exploitation of the elaborates, prepared or produced by the Executing Body by its employees and collaborators within the scope or on the occasion of the execution of this service, will remain the exclusive property of the Contracting Body, which may, therefore, dispose without any restriction of the publication, dissemination, use, duplication of said intellectual works or material. Said rights, pursuant to L. No. 633/41 "Protection of copyright and other rights granted to its exercise" as amended and supplemented by L. 248/00, must be understood to be assigned, acquired and licensed in a perpetual, unlimited and irrevocable manner. The Executing Entity undertakes to deliver all products in open and modifiable format and expressly undertakes to provide the Contracting Entity with all

documentation and material necessary for the effective exploitation of the rights of exclusive ownership, as well as to sign all documents necessary for the possible transcription of said rights in favor of the Contracting Entity in any public registers or lists. The Implementing Entity undertakes to comply with the current regulations on the collection and processing of personal data and the protection of databases.

24 Data processing

- Pursuant to Legislative Decree 196/2003 and Regulation (EU) 2016/679 of the European Parliament and of the Council of April 27, 2016 containing the European Data Protection Regulation (hereinafter also "GDPR"), we inform you that the data collected are intended for the selection of the contractor and their provision is optional in nature, it being understood that the bidder who intends to participate in the procedure or be awarded the contract must provide the Contracting Body with the documentation required by the current legislation. The rights of the interested party are those provided for in Article 13 of the aforementioned law. These rights may be exercised pursuant to and in accordance with Legislative Decree 196/2003 and GDPR. The data collected may be communicated to the staff of the Contracting Body in charge of the proceedings and to any other person who has stopped there as provided in Article 21.
- In particular, with regard to the proceedings established by this procedure:
- the purposes for which the data collected are held are inherent to the verification of the ability of the competitors to participate in the tender in question;
- the data provided will be collected, recorded, organized and stored for the purposes of managing the tender and will be processed, both by means of hard copy and magnetic media, even after the possible establishment of the contractual relationship, for the purposes of this relationship;
- the provision of the requested data is an obligation under penalty of exclusion from the tender:
- the subjects or categories of subjects to whom the data may be communicated are: 1) the staff of the Contracting Body; 2) the tenderers; 3) any other subject with an interest pursuant to Law No. 241/1990 as amended;
- the rights due to the data subject are those set forth in Article 7, of Legislative Decree No. 196/2003, as amended, and Articles 15 to 22 of the GDPR, to which reference is made;
- the active party of the collection is the Contracting Authority and the person in charge is its General Manager KOFLER ANDREAS.

The data controller is the General Manager KOFLER ANDREAS, pursuant to article 28 of the European General Data Protection Regulation ("GDPR") and article 29 of the Italian Legislative Decree no. 196/2003, as well as the Italian legislation for adaptation to the GDPR.

For any further aspect in this regard, please refer to the "Information on the processing of personal data to the customer" of the Consorzio Vini Alto Adige and address the requests to: Consorzio Vini Alto Adige, in Via Crispi 15, 39100 Bolzano (BZ), by registered letter or by e-mail to: info@suedtirolwein.com.

25 Sole manager of the procedure

Sole Manager of the procedure is Alexandra Cembran.