

# TECHNICAL SPECIFICATIONS AND SELECTION PROCEDURE FOR THE IMPLEMENTING BODY OF THE PROGRAMME NAMED: ECHO – European Certified Heritage & Origin

## 1. PREMISES AND PRELIMINARY INFORMATION

CONSORZIO TUTELA VINI VALPOLICELLA (the “**Proposing Organisation**”), with registered office at Via Valpolicella 37029 San Pietro in Cariano (VR), VAT No. 02202330235, tel. +39 045 7703194, e-mail: amministrazione@consorziovalpolicella.it, registered e-mail (PEC): info@pec.consorziovalpolicella.it, as the proposing organisation and lead partner of a partnership that includes CONSORZIO DEL FORMAGGIO PARMIGIANO REGGIANO of the programme named **ECHO – European Certified Heritage & Origin** (the “**Programme**”), within the framework of the call for proposals for EU grants for information and promotion actions concerning European agricultural products carried out in the third countries AGRIP-SIMPLE-2025-TC-AMERICAS, intends to submit a three-year (2026-2027-2028) information and promotion programme, and therefore

### ANNOUNCES,

pursuant to the relevant articles of Regulation (EU) No. 1144/2014, Delegated Regulation (EU) No. 1829/2015, Implementing Regulation (EU) No. 1831/2015, a call for tenders for the selection, through an open competitive procedure, of an implementing body (the “**Implementing Body**”) responsible for carrying out the actions/activities/initiatives aimed at achieving the objectives envisaged within the Programme (the “**Tender**”), that will be submitted under EU Regulation No. 1144/2014 of the European Parliament and of the Council - Call for proposals 2025 and which, if approved, will take place in the following target countries: USA, Canada - and will concern the following products with EU designation:

- **Amarone della Valpolicella DOCG - wine - NC 22042168**
- **Valpolicella Classico DOC - wine - NC 22042168**
- **Valpolicella Ripasso DOC - wine - NC 22042168**
- **Recioto della Valpolicella DOCG - wine - NC 22042168**
- **Formaggio Parmigiano Reggiano PDO – cheese - 0406 90 61**

Economic operators meeting the requirements indicated in the aforementioned EU Regulations, as specified in the following paragraphs, are invited to submit an offer (technical and economic) strictly adhering to the instructions contained in this Tender, in the section called “**Technical Specifications**”.

It is specified from now that, since this call for tenders is aimed at implementing a promotional programme that has yet to be submitted for funding under the aforementioned funds, if the Proposing Organisation is not among the proposing organisations selected under the aforementioned Call for proposals 2025, the award of the services

covered by this Tender will be considered null and void and ineffective. Consequently, in such an event no obligation will remain with the Proposing Organisation, which cannot be subject to any request for reimbursement or claim for damages by the participants.

Should the Programme be approved, the successful Implementing Body will be responsible for the execution of the activities envisaged in the Programme; the relationship between the Implementing Body and the Proposing Organisation will be governed by a specific contract for the provision of services (the "**Contract**").

In general, the Implementing Body, in addition to carrying out the agreed activities, must also prepare financial and operational reports, making available to the Proposing Organisation proof of payment related to the expenses incurred, as well as all documentation and information connected to the activities carried out (e.g.: geolocated photos, data on contacts and results achieved, participant lists, video recordings, description of activities carried out, and other details that will be better specified in the Contract).

## **2. REGULATORY FRAMEWORK AND REFERENCE DOCUMENTATION**

The essential regulatory framework for the execution of the Programme includes:

- **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;
- **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 concerning agricultural products implemented in the internal market and in third countries;
- **Commission Implementing Regulation (EU) 2015/1831** of 7 October 2015 laying down rules for applying Regulation (EU) No. 1144/2014 of the European Parliament and of the Council on information provision and promotion measures concerning agricultural products implemented in the internal market and in third countries;
- **European Commission Note DDG1.B5/MJ/DB D(2016)321077** of 7 July 2016 - Guidelines on the tendering procedure;
- **Decree of the Director General of the Ministry of Agriculture, Food Sovereignty and Forestry - Department of Food Sovereignty and Equestrian Affairs - DG of General Affairs and Budget - n. 0532478 of 10/10/2024** - "Criteria that non-public organizations must respect in the selection of Implementing Bodies";
- **European Commission Communication (2006/C) 179/02**, paragraph 2.1.2;
- **Call for proposals for simple/multi programmes 2025 – Promotion of agricultural products (AGRIP-SIMPLE -2025)** Type of Action AGRIP-SIMPLE-2025-TC-AMERICAS of January 22, 2025.

It is highlighted that the Proposing Organisation is not a body governed by public law within the meaning of Article 2(1)(4) of Directive 2014/24/EU and, therefore, as indicated in the aforementioned regulations, is not required to apply the national rules transposing the European Directives on public procurement (in Italy, Legislative Decree 36/2023). Directive 2014/24/EU and Legislative Decree 36/2023 will, therefore, be applicable only if and to the extent that they are expressly referred to in this Tender and related annexes.

In accordance with the provisions of the aforementioned regulations, this Tender will in any case guarantee compliance with the principles of cross-border interest, transparency, non-discrimination, proportionality, equal treatment, fair competition, absence of conflicts of interest. The selection and award criteria will be consistent with the objectives of the Programme and relevant to the nature of the activities required, favouring the best value for money.

This tender procedure does not provide for a division into lots, as it is more efficient and effective for the execution of the service to identify a single contractor who can carry out all the activities envisaged by the Programme in question. In fact, the work packages and related activities are closely connected to each other and must be carried out according to a logical and functional sequence that can be optimised only by having a single contractor, who must ensure the coordination and integration of the work group and the various professional skills necessary and involved in the realisation of the contracted service.

### **3. MAIN INFORMATION ON THE PROGRAMME**

#### **3.1. Products being promoted**

- **Amarone della Valpolicella DOCG - wine - NC 22042168**
- **Valpolicella Classico DOC - wine - NC 22042168**
- **Valpolicella Ripasso DOC - wine - NC 22042168**
- **Recioto della Valpolicella DOCG - wine - NC 22042168**
- **Formaggio Parmigiano Reggiano PDO – cheese - 0406 90 61**

#### **3.2. Target Markets**

USA, Canada

#### **3.3. Target Groups:**

- Professional operators: Ho.Re.Ca., importers and distributors
- Media operators (journalists, bloggers) and KOL (Key Opinion Leaders)
- Gourmet consumers, wine aware and foodies

#### **3.4. Programme duration**

36 months from the Programme start date, subject to possible suspension periods.

#### **3.5. Budget for the activities to be carried out by the Implementing Body**

€ 3.746.400

Economic operators intending to participate in this selection tender (the "**Candidates**") must submit an offer taking into account the overall budget highlighted above, including the fee of the Implementing Body, which must range between a **minimum of 10% and a maximum of 12%** of the total cost of activities, and shall be calculated by deducting it from the total cost of activities.

<b>MARKET</b>	<b>BUDGET</b>
USA	2.615.330,23 €
CANADA	1.131.069,77 €
<b>TOTAL</b>	<b>3.746.400,00 €</b>

Please note that, as this is not a "lowest bid" tender, the entire allocation of the above-mentioned budget is required.

### **3.6. Programme Objectives**

The general objective, as set out in the 2025 Work Programme, is to enhance the competitiveness of the EU agri-food sector and increase consumer awareness of its high standards of quality, safety, and sustainability in third countries.

The Programme aims to:

- Increase awareness among consumers in third-country markets about the quality of EU agri-food products, using Valpolicella wines and Parmigiano Reggiano as examples.
- Enhance the competitiveness of high-quality European products, using Valpolicella DOC/DOCG wines and Parmigiano Reggiano PDO as key examples, and contribute to generating new business opportunities both for consortium producers and for European agricultural producers in general in the target markets.
- Promote and raise awareness of the EU quality schemes, specifically PDO and DOC/DOCG labels.

The promotional activities will be primarily targeted at the USA and Canada, through a structured programme including participation in Vinexpo USA and the organization of proprietary events dedicated to trade operators, media, and advanced consumers (wine-aware audiences, gourmet consumers, and foodies).

The strategy should include targeted actions to enhance the value of the products through digital communication and advertising in specialized media, with a particular focus on leading wine industry publications. Additionally, initiatives aimed at specialized press will be required to strengthen the awareness and premium positioning of Valpolicella wines and Parmigiano Reggiano in the two target markets.

Candidates must submit a structured set of activities and initiatives (informative and promotional) that is developed around a clear and precise strategy focused on markets and target groups, aimed at achieving the above objectives and consistent with the EU message presented in the Programme application phase, the expected duration, and the available financial resources.

To achieve the Programme objectives and meet the requirements of the aforementioned reference regulations, the main themes to be considered are the following:

- **Certified European Quality and Authenticity:** The project must highlight the value of EU quality schemes, which guarantee authenticity, traceability, and compliance with strict production standards. In markets such as the USA and Canada, where certified European products are synonymous with superior quality, it is essential to educate consumers on these standards by leveraging industry professionals and specialized press.
- **Premium Positioning and European Lifestyle:** The project combines B2B events, masterclasses, guided tastings, and communication campaigns to educate importers, distributors, and Ho.Re.Ca. operators on the distinctive values of the promoted products. At the same time, the narrative must reach final consumers through a clear and engaging storytelling approach, encouraging informed and conscious choices.
- **Pairing and Culinary Versatility:** The combination of Valpolicella wines and Parmigiano Reggiano cheese serves as a strong narrative and commercial element. Communicating their versatility in cooking and food pairing is essential, in line with the preferences of North American markets, where interest in gourmet cuisine and sensory experiences continues to grow.
- **Sustainability and Environmental Responsibility:** The project must also emphasize sustainability aspects within the entire production chain, highlighting environmentally friendly agricultural practices and biodiversity conservation. In Canada, where sustainability is a key purchasing criterion, this theme can become a strong differentiating factor.

The following work packages (“WP”) and activities must be present within the proposals, according to the requirements described in detail within the Technical Specifications:

- **Wp 2 – Public Relations**
  - o Continuous PR activities
  - o Press events
- **Wp 3 – Website, social media**
  - o Website
  - o Social media
- **Wp 4 – Advertising**
  - o Print Adv
  - o Online Adv
- **Wp 5 – Communication tools**
  - o Promotional materials
  - o Promotional videos
- **Wp 6 – Events**
  - o Stand at the trade fairs
  - o Seminars, workshops, walk around tasting

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## TECHNICAL SPECIFICATIONS

### 4. Subject Matter of the Contract

#### 4.1. General description of the service to be provided under the Contract

The service to be provided under the Contract consists of executing part of the Programme, as outlined in this Technical Specifications document. The Implementing Body must therefore ensure:

- the development of the work packages that make up the Programme, starting from the signing of the Contract;
- the operational activation of the promotional actions and activities planned for the period established by the Programme, based on the objectives set by the communication strategy, including continuous monitoring of the activities carried out and their effects;
- the preparation of documentation aimed at providing evidence of the activities carried out.

The service must be characterized by highly qualified technical and operational support, a high standard of the products created, and stand out for the innovative nature of the messages, the tools used to convey them, and the methods of involving the target audiences. The development and execution of the agreed activities must be carried out in full compliance with the general and specific objectives and the communication strategy, taking into consideration the priorities and objectives of Regulation (EU) No. 1144/2014, ensuring clear recognizability for the Programme and its promoters.

#### 4.2. Performance modalities

The Implementing Body, in carrying out the Contract, shall:

- plan and implement the assigned work packages throughout the three-year execution period of the Programme, from the signing of the Contract until the conclusion of activities, according to the deadlines defined in the Programme, in this Tender, in the Contract, or as communicated by the Proposing Organisation;
- adhere to the communication strategy identified in the Programme, work towards achieving the objectives set by the Programme, paying attention to continuous monitoring of the activities carried out and their related effects and impacts;
- oversee the administrative/financial monitoring of the Programme, including keeping records and supporting documents, transmitting deliverables, preparing payment applications, and ensuring transparent expense reporting and sound financial management of the assigned work packages. This includes periodic reporting activities and the final technical report, according to the deadlines set by the applicable regulations;
- observe all requirements contained in this Tender and in the Contract, as well as comply with the applicable regulations, including those possibly issued during the contractual period, ensuring execution of the packages consistent with the general and specific objectives set by the Programme and Regulation (EU) No. 1144/2014, as well as clear traceability to the Programme and the Proposing Organisation;

- assign qualified individuals to the project capable of carrying out the activities, creating a work group responsible for managing and implementing the work packages, which meets the requirements of this Tender, as detailed further below;
- ensure highly qualified technical and operational support to the Proposing Organisation for the entire duration of the Contract, fully collaborating with the Proposing Organisation and guaranteeing adequate and timely information on the implementation of programme activities and the achievement of related deliverables and outputs;
- assume full technical and financial responsibility for the actions to be carried out in execution of the Contract, including that relating to compatibility with European Union law and applicable competition rules;
- retain all original documents relating to the execution of the Contract, including supporting documents according to legal obligations and in any case for a period of not less than three years after the payment of the balance, to be extended in case of inspections, audits or investigations for their entire duration;
- make available to the Proposing Organisation, upon request and/or in the context of inspections, audits or investigations, all documentation produced during the performance of the Contract, as well as all data processed, used or collected during the execution of activities, including those necessary for a correct evaluation of the Programme's effectiveness.

#### **4.3. Personnel employed and work group**

The Implementing Body must establish and maintain, for the entire duration of the Contract, a work group, in compliance with the participation requirements, which will be responsible for managing and implementing the Programme. All activities of the work group must be agreed upon and shared with the Proposing Organisation.

It is required that one or more members of the working group be available for periodic monitoring meetings at the Proposing Organisation's headquarters, to provide operational support for activities in the plan that need to be carried out in close coordination with the reference structure. Coordination and information exchange with the Proposing Organisation may also involve various methods, including meetings, phone contacts, video calls, email correspondence, and the exchange of materials and documents through online sharing systems..

The Implementing Body must ensure that services are provided by personnel with legitimate and regular employment or collaboration contracts and with the professional and technical qualifications required for the execution and realization of the project. The working group must have a flexible organizational approach to respond to variations and/or unforeseen events that may arise during the implementation of the Programme, and must speak Italian.

In particular, the staff of the dedicated working group should possess a range of skills in the following areas, listed as examples and not exhaustive: communication, event and fair organization, knowledge and experience of activities related to the target market of the project, press office, project management, digital web and social media management, graphic design, etc. Specifically, the team should be able to set quantitative objectives in advance and propose projects that align with these. Moreover, the Implementing Body must ensure proper monitoring of the results..

The Implementing Body, for the duration of the Contract, therefore commits to:

- establish and make available an adequate project team (the people who will directly handle the work to be done), in compliance with the participation requirements; this team will be defined in agreement with the Proposing Organisation;
- agree and share all team activities with the Proposing Organisation;
- assign suitable personnel to the service, of proven capacity, honesty, morality and proven confidentiality who must maintain the utmost confidentiality on what they have learned in carrying out the service;
- guarantee the stability and continuity of the service in all circumstances, ensuring personnel quantitatively and qualitatively adequate to the needs and in compliance with the contents of the technical offer;
- comply with labour contracts relating to salary, regulatory, social security and insurance treatment;
- provide a project reference person who attends monitoring meetings at the Proposing Organisation's headquarters (these will have a frequency defined by the Proposing Organisation), to provide operational support to the Programme activities;
- prepare all possible means of communication that can simplify the coordination, monitoring and control of the Programme.

## **5. Duration of the Contract**

The Contract will be signed after the Proposing Organisation signs the Grant Agreement with the Member State and the paying agency (AGEA) and will have a duration of 36 months.

The Proposing Organisation reserves the right to terminate the Contract, with at least three months' notice via registered mail with return receipt or certified email (PEC), in case of non-compliance with the provisions of this Tender.

The Proposing Organisation reserves the right to extend the duration of the Contract for an additional 6 (six) months, in order to ensure the completion of the activities foreseen in the Programme, under the same economic conditions.

## **6. Types of activities envisaged by the Programme**

The eligible activities and initiatives, according to the applicable regulations, requested within this Tender for the implementation of the Programme are similar to the classic information and promotion on high-quality agricultural and food and wine products, taking into account the themes to be addressed and the objectives listed above, and fall into the following categories:

- **Wp 2 – Public Relations**
  - o Continuous PR activities
  - o Press events
- **Wp 3 – Website, social media**
  - o Website

- Social media
- **Wp 4 – Advertising**
  - Print Adv
  - Online Adv
- **Wp 5 – Communication tools**
  - Promotional materials
  - Promotional videos
- **Wp 6 – Events**
  - Stand at the trade fairs
  - Seminars, workshops, walk around tasting

The objective is to expand the presence of the promoted denominations in the USA and Canada markets, involving the following target subjects:

- Professional operators: Ho.Re.Ca., importers and distributors
- Media operators (journalists, bloggers) and KOL (Key Opinion Leaders)
- Gourmet consumers, wine aware and foodies

The following are general guidelines for the information and promotional activities that each Candidate must include in their proposal as part of this selection procedure. While respecting the provisions of this Tender and in particular the fundamental characteristics of the Work Packages (WPs), as well as the applicable reference regulations, each Candidate has the freedom to formulate and elaborate on the proposed actions, also proposing innovative activities, while always ensuring the achievement of the Programme's objectives.

The offer must include a presentation of the general strategy of the promotional programme, based on the main information reported above, and must highlight:

- the ability to respond to the information needs of the target groups;
- the communicative effectiveness of the message and content;
- the ability to engage the target subjects.

The strategy should describe the characteristics that make the Candidate's proposal suitable for effectively conveying the message and content of the Programme, identifying the geographical areas of the target market(s) and justifying these choices, in accordance with what is indicated in this Technical Specification.

For each WP developed, an indication of the expected results and a specification of the implementation methods is required.

It is hereby specified that all activities involving the creation of printed or digital content must take into account the official languages of the target markets. In particular, for Canada, materials must be available in both English and French, in compliance with the applicable linguistic regulations in certain regions and to ensure effective communication with all relevant audiences.

<p><b>WP 2 – Public relations</b></p>
<p><b>Continuous PR activities</b></p>
<p>The press office must be developed with a strategic approach, ensuring a continuous flow of communication in the target markets (USA and Canada), in line with the positioning of Valpolicella DOC/DOCG wines and Parmigiano Reggiano PDO. The press office will be responsible for building and strengthening relationships with key industry, generalist, and lifestyle media to amplify the campaign’s visibility and disseminate its key messages.</p> <p>The proposing operator is required to detail the organization and management of the press office, including activity planning, results monitoring, and strategies to maximize media impact.</p> <p>The activity must include:</p> <ul style="list-style-type: none"> <li>- Drafting and periodic distribution of press releases targeted at journalists, bloggers, and key opinion leaders in the food and wine sector.</li> <li>- Maintaining an up-to-date media contact database and managing relationships with journalists and influencers.</li> <li>- Handling media inquiries and supporting journalists in the production of editorial content (articles, reports, podcasts, videos).</li> <li>- Monitoring media coverage and press reviews to assess communication effectiveness, with regular reports on media exposure.</li> </ul> <p>The press office must ensure a consistent media presence for the project, supporting all planned activities, including proprietary events, trade fairs, and advertising campaigns, through coherent and engaging storytelling. Communication efforts should highlight certified excellence, gastronomic culture, and the consumption experience associated with the promoted products, adapting to the specificities of the USA and Canadian markets.</p>
<p><b>Press events</b></p>
<p>Press conferences are a key moment in the communication strategy, designed to ensure maximum media visibility for the project in the USA and Canada. These events will serve as an institutional yet engaging platform to present the value of Valpolicella DOC/DOCG wines and Parmigiano Reggiano PDO, reinforcing their perception as certified European excellence.</p> <p>The proposing operator is required to detail the organization and management of press conferences,</p>

specifying the tools and strategies used to ensure broad coverage and strong participation.

The activity must include:

- Strategic planning – Defining a press conference schedule at key moments of the project, with a special focus on the campaign launch, participation in Vinexpo USA, and proprietary events.
- Selection of venues – Identifying exclusive and representative locations in target cities, aligned with the premium positioning of the products.
- Media engagement – Inviting journalists, bloggers, and industry press representatives, implementing a personalized engagement strategy to secure the presence of key stakeholders.
- Production of press materials – Developing digital and print press kits, including press releases, images, infographics, and in-depth content on Valpolicella DOC/DOCG wines and Parmigiano Reggiano PDO, with a focus on certified quality, tradition, and food pairing.
- Speaker organization – Involving key speakers, including representatives of the consortia, industry experts, and selected testimonials, ensuring authoritative and impactful content.
- Follow-up and media coverage – Managing post-event media relations, distributing summary materials, videos, and images, and monitoring media coverage to evaluate the effectiveness of the communication strategy.

Press conferences should serve as strategic visibility opportunities, generating interest and media coverage, while seamlessly integrating with other communication and promotional activities within the project. The narrative should be tailored to the specificities of the target markets, emphasizing the most relevant aspects for the U.S. and Canadian audiences.

**BUDEGT WP 2 – PUBBLIC RELATION:**

**134.400,00 €**

**WP 3 – Website, social media**

**Website**

The project website will serve as an essential information hub, providing clear and accessible content on the project, its activities, and the promoted products—Valpolicella DOC/DOCG wines and Parmigiano Reggiano PDO—for the target markets (USA and Canada). Its primary function is to support communication and promotional efforts, acting as a reference point for journalists, industry professionals, and interested consumers.

The proposing operator is required to detail the development and management of the website, ensuring an effective and sustainable approach.

The activity must include:

- A streamlined and intuitive structure – Development of a functional and user-friendly website, with a clear and easy-to-navigate interface. The main sections should provide information on the products, project values, and planned activities.
- Optimization for the target audience – Content should be tailored to the linguistic and communication preferences of North American industry professionals and consumers.
- Integration with other communication activities – The website should host updates on events, press conferences, and promotional activities, while also offering downloadable materials such as press releases and informational documents.
- Management and periodic updates – Implementation of a flexible and sustainable update structure, focusing on news, articles, and press reviews, ensuring content remains relevant and up-to-date.

The website should be a practical and functional tool, complementing other promotional activities without requiring significant investment in development and maintenance. The goal is to create a clear and authoritative reference point, reinforcing the campaign’s message with a simple yet effective approach.

## **Social media**

The social media activity will play a supporting role in the project’s communication strategy, with the objective of enhancing the visibility of Valpolicella DOC/DOCG wines and Parmigiano Reggiano PDO in the target markets (USA and Canada) in a focused and effective manner. Given the limited budget, social media management will focus on one or two dedicated platforms, ensuring regular but essential publication of informative and promotional content.

The proposing operator is required to detail the management approach for social media, ensuring a sustainable content strategy aligned with the available resources.

The activity must include:

- Selection of platforms – Identification of one or two key social media channels (e.g., Instagram and LinkedIn or Facebook), chosen based on their relevance to the target audience and the type of content planned.
- Editorial plan – Periodic publication of posts promoting events, sharing product-related content, and reinforcing the project’s visibility through visual and narrative storytelling.
- Minimal but effective interaction – Basic management of engagement with followers and industry

<p>professionals, with selective responses to relevant inquiries or comments.</p> <ul style="list-style-type: none"> <li>- Synergy with other activities – Social media content should amplify the project’s broader communication efforts, including event coverage, press conferences, and advertising in top-tier wine industry publications.</li> </ul> <p>The social media approach will be pragmatic and sustainable, ensuring a cohesive and effective digital presence that supports the overall promotional strategy of the project.</p>	
<p><b>BUDGET WP 3 – WEBSITE, SOCIAL MEDIA:</b></p>	<p><b>117.600,00 €</b></p>

<p><b>WP 4 – Advertising</b></p>
<p><b>Print Adv</b></p>
<p>The print media advertising activity will be a key element in strengthening the visibility of Valpolicella DOC/DOCG wines and Parmigiano Reggiano PDO among a highly targeted audience of professionals and passionate consumers. The selection of media outlets should prioritize prestigious and industry-leading publications, particularly those with a strong presence in the USA and Canada.</p> <p>The proposing operator is required to detail the advertising strategy, specifying the selection of media outlets, content formats, and campaign scheduling.</p> <p>The activity must include:</p> <ul style="list-style-type: none"> <li>- Selection of relevant publications – Identification of wine-focused magazines and specialized food &amp; wine publications that include sections on pairings and recipes featuring premium food products, ensuring a strong impact on the target audience in the US and Canadian markets.</li> <li>- Targeted advertising formats – Use of print advertisements, balancing institutional placements with editorial-style content that highlights the quality and value of the promoted products. Digital advertising integration may be considered when relevant.</li> <li>- Strategic planning – Development of a publication calendar aligned with the project’s overall communication plan, ensuring maximum visibility during key industry periods (e.g., major trade fairs and events).</li> </ul> <p>The objective of this activity is to reinforce the positioning of Valpolicella DOC/DOCG wines and Parmigiano Reggiano PDO as symbols of European quality, reaching decision-makers and high-end consumers through authoritative and widely recognized industry publications.</p>

**Online Adv**

The online advertising campaign will complement the print media strategy, ensuring a broader and more targeted coverage through the digital platforms of leading wine industry publications. The objective is to strengthen the visibility of Valpolicella DOC/DOCG wines and Parmigiano Reggiano PDO among a select audience of industry professionals, experts, and passionate consumers in USA and Canada, leveraging the opportunities offered by these publications' digital platforms.

The proposing operator is required to detail the online advertising strategy, specifying the media selection, proposed formats, and campaign implementation methods.

The activity must include:

- Selection of digital platforms – Identification of online versions of key wine and food industry publications, ensuring high relevance to the project's target audience.
- High-impact digital formats – Use of banners, sponsored content, promotional articles, and native advertising, optimized for the audiences of the selected media outlets.
- Strategic planning – Development of an editorial and distribution plan to maximize visibility during key campaign moments, ensuring synergy with print advertising and other promotional activities.
- Performance monitoring – Implementation of analytics tools to measure traffic, engagement, and user conversion, ensuring an effective assessment of return on investment.

The digital campaign will amplify the project's message with a targeted and flexible approach, reaching the most influential online channels in the international wine sector.

**BUDGET WP 4 – ADVERTISING:**

**504.000,00 €**

**WP 5 – Communication tools**

**Visual campaign and communication strategy**

The communication strategy and visual campaign must ensure consistency, recognizability, and full compliance with the rules established for EU co-financed programs under Regulation (EU) 1144/2014. The project must strictly adhere to the visual identity guidelines set for the promotion of European agri-food products, ensuring that the “Enjoy, it's from Europe” logo and other institutional elements are properly integrated into all communication materials.

The proposing operator is required to detail the development process of the communication strategy and visual campaign, ensuring compliance with graphic standards and alignment with the EU’s promotional objectives.

The activity must include:

- Compliance with EU visual guidelines – Correct application of the “Enjoy, it’s from Europe” logo, respecting the proportions, colors, and positioning rules set by the European Commission’s AGRIP program directives.
- Development of a harmonized visual identity – Creation of a cohesive graphic identity, ensuring proper integration of EU institutional elements alongside the project’s promotional content.
- Coordination with promotional activities – Ensuring that all communication materials—print and digital advertising, social media, website, events—maintain a uniform visual identity in line with EU standards.
- Visual materials for promotion – Production of images, infographics, and graphic content that emphasize the European origin and certified quality of the products, avoiding references to non-compliant messages as per EU guidelines.
- Implementation guidelines – Development of a visual manual to ensure correct usage of all graphic elements, including minimum logo dimensions, approved color combinations, and rules for shared advertising spaces with other institutions.

The activity must guarantee that communication efforts are not only effective and impactful in the USA and Canada but also fully compliant with the regulatory and visual requirements established for EU-funded projects.

**Promotional material**

The development of promotional materials will support the project’s communication efforts, ensuring a coordinated and recognizable presence in the target markets. All materials must comply with European Union guidelines, ensuring the correct use of institutional logos and alignment with the campaign’s visual identity.

The proposing operator is required to describe the production and distribution strategy for promotional materials, which should include both digital and physical tools, such as brochures, leaflets, banners, roll-ups, and branded promotional items. The communication approach must highlight certified quality, food safety, and sustainability, which are fundamental principles of the EU agri-food promotion policy.

The materials will be used across all project activities, including events, trade fairs, B2B meetings, and media campaigns, and should be tailored to different target audiences. The operator must also ensure effective

distribution, in synergy with other planned actions within the program.	
<b>Promotional videos</b>	
<p>The production of promotional videos will play a supporting role in the project’s communication strategy, reinforcing the narrative and ensuring a coordinated presence across events, social media, and digital platforms. The video content must effectively convey the values of European-certified quality, production tradition, and culinary versatility, in line with the campaign’s objectives.</p> <p>The activity must include:</p> <ul style="list-style-type: none"> <li>- Concept and visual storytelling – Creation of an engaging narrative that highlights the authenticity and quality schemes of Valpolicella DOC/DOCG wines and Parmigiano Reggiano PDO, emphasizing their territorial identity and excellence within the European agri-food landscape.</li> <li>- Formats adaptable to communication channels – Production of short videos for social media and advertising, as well as more structured content for events, websites, and industry media.</li> <li>- High-quality footage – Creation of visually compelling content showcasing production processes, terroir, and cultural significance, including interviews with experts, producers, and chefs.</li> <li>- Subtitling and linguistic adaptation – Development of English and French versions (for Canada) to ensure effective dissemination in target markets.</li> </ul> <p>The objective of this activity is to strengthen the perception of Valpolicella DOC/DOCG wines and Parmigiano Reggiano PDO as symbols of European agri-food excellence, using impactful visual content that enhances their authenticity, certified quality, and versatility.</p>	
<b>BUDGET WP 5 – COMMUNICATION TOOLS:</b>	<b>100.800,00 €</b>

<b>WP 6 – Events</b>	
<b>Stand at the trade fairs</b>	
<p>Participation in Vinexpo USA represents a strategic opportunity to promote the values of the European Union and strengthen the presence of Valpolicella DOC/DOCG wines and Parmigiano Reggiano PDO in the North American market. This international trade fair is a key reference point for industry professionals, including importers, distributors, sommeliers, and HoReCa operators, providing an ideal setting to highlight certified quality under the PDO and DOC/DOCG schemes.</p>	

The proposing operator is required to describe the organization and management of the participation, ensuring a coordinated brand image aligned with EU guidelines for agri-food promotion.

The activity must include:

- Setting up an exhibition space that effectively highlights the products and the principles of European promotion, ensuring visibility for EU logos and informational materials.
- Organizing tastings and B2B meetings, involving experts and buyers to showcase the distinctive characteristics of Valpolicella DOC/DOCG and Parmigiano Reggiano PDO.

The objective is to reinforce the perception of European agri-food products as synonymous with excellence, quality, and authenticity, while building strategic relationships with key operators in the U.S. market.

#### **Seminars, workshops and walk around tastings**

Each year, two stand-alone events will be organized—one in the United States and one in Canada—to promote Valpolicella DOC/DOCG wines and Parmigiano Reggiano PDO within an exclusive setting entirely dedicated to showcasing European agri-food excellence. These events will combine an exhibition area, where professionals can discover and taste the products, with an educational section designed to enhance awareness of EU quality schemes among trade operators, media representatives, and selected consumers.

The proposing operator will be responsible for the event’s design and logistical management, ensuring that the setup aligns with EU visual identity guidelines. The exhibition space should facilitate networking between producers, buyers, and the press, incorporating dedicated areas for guided tastings and B2B meetings. The educational section will host masterclasses, seminars, and thematic talks, featuring experts, sommeliers, and industry professionals to deepen knowledge about European agri-food values.

Additionally, the operator will handle venue selection, invitation management for buyers, distributors, and specialized press, pre- and post-event communication campaigns, and the production of promotional materials compliant with EU regulations. A post-event follow-up will be essential to consolidate newly established relationships and evaluate the initiative’s impact.

The objective of these events is to strengthen the competitiveness of European agri-food products in the USA and Canada, fostering strategic networking opportunities, increasing awareness of EU quality schemes, and generating significant media coverage to amplify the campaign’s message.

**BUDGET WP 6 – EVENTS:**

**2.889.600,00 €**

## **7. Requirements for participation in the Tender**

## **7.1. Eligibility Requirements**

Candidates may participate in this tender either individually or as part of an association, provided they meet the requirements outlined below. A Candidate participating as part of an association is prohibited from also participating individually; in such cases, both offers will be deemed ineligible.

To be eligible for this tender procedure, the Candidate must comply with the submission requirements, have legal personality, and be established in a Member State of the European Union. In the case of participation as an association (e.g., temporary grouping of companies or business networks), the eligibility requirements (legal personality and establishment in an EU Member State) must be met by all participants at the time of submitting the offer.

Under penalty of exclusion, the Candidate must submit a certificate from the Chamber of Commerce, Industry, Handicrafts, and Agriculture attesting to activities consistent with those covered by this Tender. If the Candidate is not based in Italy, they must present a certificate of registration in a commercial registry maintained in the Member State where the operator is established.

In the case of participation as a not-yet-formed temporary grouping of companies, the offer (technical and economic) must be signed by all economic operators who will form the association and include a declaration stating their commitment, in case of award, to grant a special collective mandate with representation to one of them (to be indicated in the offer and designated as the lead entity), who will sign the Contract on behalf of themselves and the other members.

Candidates who are under control relationships as defined by Article 2359 of the Italian Civil Code or any other relationship - formal or *de facto* - that implies attribution of offers to a single decision-making centre are prohibited from participating.

Candidates are also prohibited from participating in more than one temporary grouping of companies. If such a situation arises, all participants involved—both individually and as part of an association—will be excluded.

## **7.2. Absence of grounds for exclusion from participation in the tender**

Participation in this tender procedure is reserved, under penalty of exclusion, for Candidates who declare at the time of submission that no exclusion grounds exist under Directive 2014/24/EU. These grounds include:

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

The absence of these grounds must be certified through a declaration (**Annex A**) signed by the legal representative. In cases where a temporary grouping of companies participates in the tender, all economic operators forming part of it must submit and sign their own declaration.

## **7.3. Requirements for economic and financial capacity**

The Candidate must have achieved, in the three years preceding the publication of this Tender, a total global turnover of not less than € 3.000.000,00 excluding of VAT.

For these reasons, Candidates must attach to their offer, under penalty of exclusion:

- a) the last three approved financial statements. In case of temporary grouping of companies or business networks, each participating entity must submit these documents;
- b) a declaration from the economic operator's reference credit institution attesting to the solidity and sufficiency of the financial means necessary to guarantee the optimal execution of the actions envisaged by the Programme for its entire duration and until the closure of the final balance report. In the case of temporary grouping of companies or business networks, each participating entity must submit this declaration.

Along with sending the indicated documentation, Annex A must be transmitted, attesting to the existence of financial capacity requirements through a declaration made and digitally signed or in handwritten form by the legal representative. In the case of temporary grouping of companies or business networks not yet established, the legal representatives of each company participating in the association or network must sign Annex A.

#### **7.4. Requirements for technical and professional capacity**

The Candidate (single or in a temporary grouping of companies) intending to participate in this selection tender must:

- have carried out, during the three years preceding the publication of the Tender, services similar to those covered by this tender for an amount not less than a total of Euro 2.000.000,00 excluding VAT;
- attach the list of the main services performed (company CV);
- attach the CVs of the personnel who will be employed in the execution of the Contract, from which proven experience in services similar to those covered by this Tender can be demonstrated.

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

- management of complex international promotion projects/programs;
- management of company groupings and coordination of working groups;
- organisation of events and incoming activities;
- management of press office activities;
- communication, PR, etc. activities, including online;
- production of informational material;
- production of promotional videos;
- promotional activities in the agri-food sector;

Along with sending the indicated documentation, Annex A must be transmitted, attesting to the existence of operational capacity requirements through a declaration made and signed by the legal representative.

In the case of temporary grouping of companies or business networks not yet established, each legal representative must sign Annex A. These requirements must be met by the economic operator or by the temporary grouping of companies as a whole, provided that in the latter case, the lead company must in any case possess the requirements and perform the services to a majority extent.

## 8. Award criteria

The Evaluation Committee, responsible for assessing the technical and economic offers of the Candidates, will be appointed after the deadline for the submission of offers and will consist of an odd number of up to 5 members, who are experts in the specific sector to which the Contract refers. The Contract will be awarded based on the principle of the best quality-price ratio. For each evaluation category, points will be assigned as follows:

- a) quality of the technical offer: maximum 85 points;
- b) economic offer: maximum 15 points.

Each Candidate will be assigned a score according to the criteria indicated above and the sub-criteria defined in the tables below. The maximum score is one hundred points (100). The work of the Committee must be adequately recorded, including, among other things, the reasons supporting the evaluations made.

### 8.1. Evaluation and quality of the technical offer

The technical offer must ensure the minimum requirements described in this Technical Specification. It must be formulated to provide all necessary elements for a complete and in-depth evaluation regarding the content and quality of the proposed service. Its preparation must be characterized by conciseness, concreteness, and feasibility.

The maximum technical score of 85 points will be assigned based on the clarity, logic, and methodological rigor of the presentation; conciseness; completeness; and consistency with what is required in the tender documents, applying the following criteria and sub-criteria as indicated in the table below.

<b>Criteria</b>	<b>Sub-Criteria</b>	<b>Maximum Score</b>
1. OVERALL STRATEGY	Adequacy of the proposed methodology and quality of the communication strategy structure: in particular, demonstration of the ability to achieve the expected project results	Up to 3 points
	Consistency between the overall project strategy and the individual activities, as well as coherence between the overall project strategy and the project's expected objectives	Up to 3 points
	<b>Maximum attributable score</b>	<b>6</b>

2. PROJECT OUTPUTS	Creativity and innovation in the implementation methods and content of the proposed project outputs (e.g., press office management, production of informational materials and online communication, organization of events and incoming activities, etc.)	Up to 15 points
	Effectiveness and ability of the expected outputs to convey the project's message	Up to 5 points
	Quality of the graphic proposal, concept, and promotional message content, ensuring alignment with the project's expected results	Up to 15 points
	Quality of the team dedicated to communication, graphic design, event management, etc., for the project (assessment based on team members' CVs)	Up to 10 points
<b>Maximum attributable score</b>		<b>45</b>
3. METHODOLOGICAL APPROACH	Adequacy of the implementation and execution methods	Up to 8 points
	Adequacy of planning in terms of alignment with communication strategy objectives and consistency with the scheduling timeline: specifically, coherence between the proposed activity schedule and the effectiveness of action execution, including the involvement of professional resources	Up to 3 points
	Adequacy of control mechanisms to monitor the proper economic-financial execution of the project and compliance with the schedule: quality and effectiveness of the execution methods of the planned actions	Up to 3 points
	Quality of the team dedicated to project management activities (assessment based on team members' CVs)	Up to 6 points
	Adequacy and effectiveness of the tools provided for evaluating project results	Up to 3 points
	Quality of the team dedicated to project result evaluation (assessment based on team members' CVs)	Up to 6 points
<b>Maximum attributable score</b>		<b>29</b>
	Additional proposed services	Up to 3 points i
	Support activities provided to the Proposing Organisation	Up to 2 points

<b>Maximum attributable score</b>	<b>5</b>
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For determining the scores obtained for the technical offer in relation to the criteria and sub-criteria indicated above, the discretionary attribution method will be used by the Evaluation Committee, applying a coefficient (to be multiplied by the maximum score attributable for that criterion), varying between 0 and 1. Therefore, the Evaluation Committee will assign a justified score to each offer according to the following grid:

<b>QUALITATIVE JUDGMENT</b>	<b>COEFFICIENTS</b>
Not identifiable	0
Insignificant evaluation	0.1
Barely sufficient evaluation	0.2
Sufficient evaluation	0.3
Evaluation between sufficient/fair	0.4
Fair evaluation	0.5
Evaluation between fair/good	0.6
Good evaluation	0.7
Evaluation between good/excellent	0.8
Excellent evaluation	0.9
Outstanding evaluation	1

The evaluation method includes the following steps:

a) the Evaluation Committee assigns a coefficient between 0 and 1 to each offer for every criterion, defining a score for each criterion obtained by multiplying the maximum assignable score for the criterion by the coefficient chosen by the committee.

b) calculation of the total score for each offer by summing the products derived from the multiplication of the maximum assignable scores and the assigned coefficients:

$$Total\ Score_{\{offer\}} = \sum_{\{i=1\}}^{\{n\}} (C_i \times P_i)$$

- $C_i$  = coefficient assigned for the criterion
- $P_i$  = maximum score assigned to the criterion
- $n$  = total number of criteria

- c) approximation of any non-integer values to the second decimal place;
- d) comparison of the total scores obtained by the offers and creation of a final ranking, identifying the successful bidder as the economic operator whose offer has achieved the highest score.

If there is only one valid offer, the Proposing Organisation has the discretion to proceed with or cancel the Contract award. In the event of a tie, the contract will be awarded to the bidder with the highest technical offer score. If there is still a tie in both the economic and technical offers, the award will be decided by a draw.

The Evaluation Committee will be appointed ad hoc after the deadline for submission of offers and will carry out the selection procedures.

## 8.2. Evaluation of the economic offer

The economic offer must be structured in such a way as to allow the evaluation of the various elements indicated in the following table:

<b>ECONOMIC OFFER: MAXIMUM 15 POINTS</b>		
<b>Evaluation Element</b>	<b>Motivational Criteria</b>	<b>Maximum Score</b>
<b>ECONOMIC OFFER (Max 15 points)</b>	<b><u>Economic Analysis:</u></b>  Assessment of the cost-effectiveness of the proposed initiatives based on market prices	Up to 10 points
	<b><u>Fee:</u></b>  Evaluation of the appropriateness of the fee (expressed in man-days) requested by the bidding economic operator for the implementation of each action, considering the cost of each action and the expected benefits	Up to 5 points
<b>Maximum Attributable Score</b>		<b>15</b>

For the economic offer for the activities (maximum of 10 points out of 15), the score will be assigned based on the following formula: *score of the “economic offer for the activities” considered = (Offer X / Maximum Offer) \* 10*, where:

- maximum offer: the highest economic offer for activities (SUBTOTAL ACTIVITIES) among those submitted;
- offer X: the economic offer for activities (SUBTOTAL ACTIVITIES) of the considered Candidate.

For the economic offer for the Candidate's fee (maximum of 5 points out of 15), the score will be assigned based on the following formula: *score of the economic offer for the fee of the considered economic operator. = (minimum fee % / fee % X) \* 5*, where:

- minimum fee %: the lowest percentage of the fee related to the economic offer for the fee of the Candidate among those submitted;
- fee % X: the percentage of the fee related to the economic offer for the fee of the considered Candidate.

For scoring purposes, any non-integer values will be rounded to the second decimal place. No price increases are allowed.

Based on the scores assigned to the offers, a ranking will be created.

The award will be made to the Candidate who, meeting all the minimum mandatory requirements, has achieved the highest total score (technical offer score + economic offer score). In case of a tie, the contract will be awarded to the Candidate who has obtained the highest technical offer score. In case of a tie in both the economic and technical offers, a draw will be held between the tied Candidates.

The Proposing Organisation is not required to pay any compensation to Candidates for the offers submitted. After conducting the necessary checks regarding the required qualifications, the award procedure will proceed.

The award immediately binds the winning Candidate, while the Proposing Organisation will be definitively committed only when, according to the law, all subsequent necessary acts for the completion of the tender have acquired full legal effect.

If the awarded Candidate fails to sign the Contract or if false statements are found, the Proposing Organisation reserves the right to award the contract to the next highest-ranking Candidate, after carrying out the necessary checks.

The Contract will be awarded even if only one valid offer is submitted, provided it is considered appropriate. The Proposing Organisation reserves the right not to proceed with the award if no offer is found suitable or advantageous in relation to the contract's object.

The results will be communicated via PEC (certified email) to the Candidates and published on the Proposing Organisation's website.

## **9. Submission procedures**

### **9.1. Submission of proposals**

Candidates must, under penalty of exclusion, submit their proposal by 31/03/2025 at 10 am, using one of the following options:

- a) via PEC: submit to the address: [info@pec.conorziovalpolicella.it](mailto:info@pec.conorziovalpolicella.it).
- b) In case of foreign economic operator: by courier or registered mail: submit both a paper and electronic version of the offer on CD or USB stick to the address: Via Valpolicella 37029 San Pietro in Cariano (VR) – ITALIA o alla mail [amministrazione@consorziovalpolicella.it](mailto:amministrazione@consorziovalpolicella.it);

All documents must be duly signed and stamped.

In the case of submitting the offer in paper format, the envelope must bear the following statement: “DO NOT OPEN: CONTAINS OFFER FOR OPEN COMPETITIVE PROCEDURE FOR THE SELECTION OF AN EXECUTION BODY – [CANDIDATE NAME]”.

If sent via PEC, the subject must read: “OFFER FOR OPEN COMPETITIVE PROCEDURE FOR THE SELECTION OF AN EXECUTION BODY – [CANDIDATE NAME]”.

Participants may send the offer through multiple emails if the attachments exceed 100 MB. If multiple emails are needed, all emails must be received by the specified time and date, and the subject line must, in addition to the statement above, indicate the message number out of the total number of messages (e.g., “PART 1 OF 3”, “PART 2 OF 3”, and “PART 3 OF 3”).

The delivery of offers, if for any reason they fail to arrive at the designated address by the specified deadline, is at the sole risk of the sender.

Candidates must, under penalty of exclusion, submit all necessary documentation in one package containing 3 envelopes or 3 PEC messages, specifically:

**I. PEC A / Envelope A - Administrative Documentation, which must include:**

- annex A, completed and signed by the legal representative of the Candidate. In case of participation as a temporary grouping of companies, each economic operator in the grouping must submit its own fully completed Annex A, signed by its respective legal representative;
- a valid identity document of the signer(s);
- a valid CCIAA certificate or registration in a commercial register maintained by the member state where the economic operator is based. In case of participation as a temporary grouping, each economic operator must provide its own CCIAA certificate or equivalent document;
- the last three approved financial statements. In case of temporary business associations or business networks, each participant must submit these financial statements;
- a declaration from the Candidate’s referring bank attesting to the financial solidity and sufficiency of the financial resources necessary to ensure the optimal execution of the actions foreseen by the Programme for its entire duration and until the closure of the final financial report. In case of temporary business associations or business networks, each participant must submit this declaration;
- in case of participation as a temporary grouping, a document signed by all legal representatives of the economic operators in the grouping, which must explicitly state that, in the event of winning the tender, these operators will grant a special collective mandate with representation to one of them (to be indicated in this document and qualified as the representative), who will sign the Contract on behalf of themselves and the other participants.

**II. PEC B / Envelope B - Technical Offer, which must include:**

- a detailed description of the proposed activities/initiatives;
- an indicative timeline of the proposed activities;
- a presentation of the Candidate (as detailed as possible). In case of participation as a temporary grouping of companies or network, the presentation should cover each participant;
- a presentation of the team and a detailed description of the professional profiles involved and their competencies.

### **III. PEC C / Envelope C - Economic Offer, which must include:**

- a detailed financial plan for each proposed activity/initiative and the related fee – to be provided in Excel format (the tender documents provide a budget template in Excel format to be used, with merely indicative examples - see Excel File – Budget Model);
- a summary budget for the three-year period by country – to be provided in Excel format.

#### **9.2. Preparation of the technical offer**

In Envelope B – Technical Offer, the following documents must be included:

##### **I. Detailed Description of Proposed Activities/Initiatives**

The Candidate should define the promotion and information plan, proposing the activities/initiatives they deem most effective while considering the requirements listed in this Tender. The choice of proposed activities/initiatives must be justified based on their effectiveness in achieving the Programme's objectives, the topics to be disseminated and addressed, and the identified countries and target groups, demonstrating careful reflection to achieve the maximum possible impact. It is recommended to propose initiatives that can achieve the highest-level objectives. A description of the proposed programme of activities should be provided, indicating the activity plan for each country of intervention and for each of the 3 years. The description must be provided for each individual activity/initiative and should include at least:

- title of the activity/initiative;
- target group(s) for the activity;
- description of the activity (with product indicators);
- main results and the number and type of expected contacts (both direct and indirect – result indicators), broken down by target group type involved (it is recommended not to underestimate the importance of this point).

It should be noted that the information provided for each activity/initiative will be compared with the respective costs in the Economic Offer – Envelope C, to assess its cost-effectiveness and relevance.

## II. Indicative timeline of the proposed Programme

The Candidate must provide an indicative timeline of the proposed activities/initiatives, divided by year/month.

## III. Presentation of the Candidate

The Candidate must provide a general presentation in terms of: contacts, experience gained in the field of promotion/information on high-quality agricultural products (or other sectors), experience in organizing events, PR and Press Office activities, organization of tastings and press campaigns, preparation of promotional/informative material, website management, participation in fairs, and organization of event sponsorships. In this context, information can be provided on any membership in networks of similar organizations operating in the same field, at the European and international level, and specifically in the country of intervention of the Programme.

## IV. Presentation of the Work Team

The Candidate must provide a presentation of the work team, detailing the professional figures involved, their competencies, and their experiences.

The description of the activities/initiatives, the timeline, the presentation of the Candidate and the working group will together form the technical offer, based on which the quality of the submitted proposal will be evaluated.

### **9.3. Presentation of the economic offer**

In Envelope C – Economic Offer, the following documents must be included:

#### I. Detailed financial plan for each proposed activity/initiative

The Candidate must provide a detailed financial plan for each proposed activity/initiative, broken down by year, structured according to the table in Excel provided in the tender documentation (FILE EXCEL – BUDGET MODEL). The detailed financial plan (FILE EXCEL – BUDGET MODEL) must also be submitted in Excel format on a digital medium. For each proposed activity, the expected costs must be detailed as much as possible and indicated excluding VAT. The costs must be organized and presented in a table (FILE EXCEL – BUDGET MODEL) that includes the name of the initiative and the individual cost items that make up the total sum (total cost of the actions), which in turn is composed of the individual initiative costs, broken down by the individual cost items. Within the actions, costs related to the participation/supervision activities of the Implementing Body Organisation (e.g., travel, meals, accommodation) can be included.

#### II. Clarifications on the Implementing Body's fees

The costs related to the Implementing Body's fee must be presented/calculated in terms of person-days for each individual initiative they pertain to. The methodology and data necessary to quantify these costs must be provided. These costs relate to all activities required for the execution of the activities themselves (e.g., selection and contact with suppliers, price research, location selection, bookings, definition of operational strategies, etc.). However, activities carried out directly by the Implementing Body using its own personnel

(so-called “in-house services”) are not included in the fee. For example: translations, website development, creation and management of social media, creation of press releases, staff or subcontractor briefings, etc. These types of costs correspond to actual activities that must be included in the programme's cost/budget plan.

Great attention should be paid to the definition of fee costs, as they are subject to evaluation.

### III. Presentation of the detailed financial plan

A table must be provided summarizing, by year, the total costs of the proposed activities and the corresponding fee costs of the agency, indicating the number of days and daily cost. To complete the detailed cost table, the FILE EXCEL – BUDGET MODEL, provided in the tender documents, should be used as an example. The use of this model by all Candidates, although not mandatory, will facilitate the evaluation of the proposals by the Evaluation Committee. The total amount of € 3.746.400 available for the implementation of actions in the three-year period of the Programme, including the cost of the Implementing Body’s fee, should appear as the total for the Programme.

### IV. Presentation of the summary budget by country and year

The Candidate must also provide a summary table for the three-year period, where for each proposed activity/initiative, the total cost of the activity and the corresponding fee cost are indicated. The summary budget should be structured based on the following table, in accordance with the information in the FILE EXCEL – BUDGET MODEL, and should be attached to the proposal in Excel format as well:

#### Detailed Financial Plan

TARGET COUNTRY	[COUNTRY]					
ANNUITY	[AAAA]					
Activity description	DESCRIPTION OF COST ITEM	NUMBER OR QUANTITY	UNIT VALUE (€)	TOTAL VALUE (€)	EXPECTED DELIVERABLES	EXPECTED CONTACTS REACHED
<b>WP2 – Public relations</b>						
WP 2.1 Press releases				-		
WP 2.2 Press Events				-		
<b>SUB-TOTAL ACTIVITIES WP 2 PER YEAR</b>				-		-
<b>ECONOMIC OPERATOR FEE WP2</b>						
<b>WP3 – Web Site; Social Media</b>						
WP 3.1 Website				-		
WP 3.2 Social Media				-		
<b>SUB TOTAL ACTIVITIES WP 3 PER YEAR</b>				-		-
<b>ECONOMIC OPERATOR FEE WP3</b>						
<b>WP4 – Advertising</b>						
WP 4.1 ADV Press				-		
WP 4.2 ADV On Line				-		

#### Summary Budget

TARGET COUNTRY	[COUNTRY]			TOTAL	% FEE
	YEAR 1	YEAR 2	YEAR 3		
(A) GENERAL SUBTOTAL FOR EACH ACTIVITY SUBTOTAL FOR WP2, WP3, WP4, WP5, WP6				-	
(B) GENERAL SUBTOTAL BY FEE SUBTOTAL FOR WP2, WP3, WP4, WP5, WP6				-	
A+B) TOTAL ECONOMIC OFFER TARGET COUNTRY FOR EACH INDIVIDUAL YEAR	-	-	-	-	

\* NB THE TOTAL OF THE ECONOMIC OFFER must be at most equal to the total amount of this selection procedure

The set of tables shown above by way of example will form the economic offer and must be inserted in envelope C- Economic offer

In addition, the economic operator will have to provide electronic support, the electronic offer both in .pdf format and in .xls format

The **Detailed Financial Plan** (FILE EXCEL – BUDGET MODEL) and **Summary Budget** will form the economic offer, which will be evaluated based on the price of the proposal submitted.

#### 9.4. Procedure for opening the Technical Offer envelopes

The opening of Envelope A containing the administrative documentation of the Candidates, for the purpose of their admission to the tender, will take place at the premises of the Proposing Organisation on 01/04/2025, at 10 am, in a public session. The legal representative (or a person duly delegated in writing) of each Candidate may attend this session, presenting a valid identification document.

Once the opening of Envelope A is completed and the eligibility of the Candidates has been determined, the evaluation committee will proceed, in a private session, to evaluate the technical offers (Envelope B) and the economic offers (Envelope C).

Any formal deficiencies, if remediable (at the exclusive discretion of the evaluation committee), may be rectified through requests for additional documentation or information from the committee, where deemed appropriate. In particular, in cases of missing, incomplete, or any other essential irregularity of the submitted documentation, excluding those related to the economic offer and technical offer, the Proposing Organisation will grant the Candidate a deadline (at the discretion of the evaluation committee) to provide, complete, or regularize the necessary declarations, specifying the content and the parties responsible for them. In case of the deadline's expiration without correction, the Candidate will be excluded from the tender. Non-remediable essential irregularities include missing documentation that does not allow identifying its content or responsible party. If the Candidate provides declarations or documents that are not perfectly consistent with the request, further clarifications may be requested, limited to the documentation submitted for integration, with a deadline for submission under penalty of exclusion.

For any questions or clarifications related to the execution of the offer, inquiries can only be made via email to [amministrazione@consorzioalpolicella.it](mailto:amministrazione@consorzioalpolicella.it); with responses provided exclusively in writing. No verbal requests or those submitted through other means will be considered. Communication from the Proposing Organisation will take place via email to the email address indicated by the Candidate.

#### 9.5. Communication of the selection outcome

All Candidates will be notified of the outcome of the selection process via PEC, along with the corresponding reasoning. The results will also be published on the Proposing Organisation's website within 10 business days from the conclusion of the selection procedure.

#### **10. Assignment and subcontracting**

The Implementing Body is required to perform the services specified in the Contract by itself, and the Contract cannot be assigned under penalty of nullity, except in cases provided by law.

Subcontracting is only allowed with prior written authorization from the Proposing Organisation. If the Implementing Body intends to use subcontracting, it must submit a request specifying the services it intends to subcontract and the identity of the subcontractor. Subcontracted activities may only include non-essential and ancillary tasks.

#### **11. Non-performance and termination**

The Proposing Organisation has the right to monitor and verify the proper performance of the Contract with the assistance of personnel chosen at its discretion. Since the Contract is financed with European Union resources, checks may also be carried out by the relevant European Union services and/or national authorities.

Additionally, the Proposing Organisation has the right to contest any services provided that do not fully comply with the requirements of this Tender or the offer submitted by the Candidate. The Contract will contain clauses concerning non-performance, disputes, suspensions, and terminations.

#### **12. Conflicts of interest**

In accordance with the Ministerial Decree of October 10, 2024, no. 05324781 MASAF – Department of Food Sovereignty and Equine Affairs – General Affairs and Budget Directorate, entitled “Criteria that non-public organizations must follow in selecting implementing bodies”; Regulation (EU) 1144/2014; Delegated Regulation (EU) 1829/2015; Implementing Regulation (EU) 1831/2015; the European Commission's Note DDG1 B5/MJ/DBD (2016) 321077 dated July 7, 2016 – Guidelines on the tender procedure; the European Commission Communication (2006/C 179/02), paragraph 2.1.2; the Commission's Notice – Guidelines on preventing and managing conflicts of interest under the Financial Regulation – Published in the Official Journal – 2021/C 121/01 (in all official EU languages) specifically relating to the implementation of Article 61 of the European Union Financial Regulation; the Proposing Organisation, in carrying out this selection procedure, adopts all suitable measures to prevent, identify, and effectively address conflicts of interest that could distort competition and ensure equal treatment of all economic operators.

#### **13. Rights of ownership and use**

The rights of ownership and/or the economic exploitation and use of the works prepared or created by the Implementing Body, its employees, and collaborators in the scope or occasion of executing the Contract, will remain exclusively the property of the Proposing Organization. Therefore, the Proposing Organization will have unrestricted rights to publish, disseminate, use, and duplicate these works or materials. These rights, according to Law No. 633/41 "Protection of Copyright and Other Rights Granted for its Exercise," as amended by Law 248/00, must be understood as assigned, acquired, and licensed perpetually, without limitation, and irrevocably. The

Implementing Body commits to delivering all products in an open and editable format and expressly agrees to provide the Proposing Organization with all the necessary documentation and materials for the effective exploitation of the exclusive rights of ownership. It also commits to signing all necessary documents for the eventual registration of these rights in favour of the Proposing Organization in any public registers or lists.

#### **14. Confidentiality and non-disclosure**

The Implementing Body commits to maintaining the utmost confidentiality regarding the entrusted mandate and all information acquired in relation to it, both during the term of the Contract and after its expiration. The Implementing Body is prohibited from using such information for personal purposes or for the benefit of third parties, as well as from disclosing, communicating, or disseminating it in any form, unless with prior written consent from the Proposing Organization or if required by law.

#### **15. Data Processing**

In accordance with Regulation (EU) 2016/679 ("**GDPR**") and Legislative Decree 196/2003, as amended by Legislative Decree 101/2018, it is informed that the personal data collected through this tender procedure will be processed in compliance with the applicable legislation on data protection.

Specifically:

- a) purpose of the processing: the collected data will be used exclusively for verifying the eligibility of competitors to participate in the tender, for managing the tender procedure, and, in the case of an award, for establishing and managing the contractual relationship;
- b) method of processing: the data will be processed using both paper-based and electronic tools, in compliance with the principles of lawfulness, fairness, transparency, data minimization, and protection of confidentiality;
- c) mandatory nature of providing data: providing the requested data is mandatory for participation in the tender. Failure to provide the data may result in exclusion from the procedure;
- d) communication of data: the data may be communicated to the following subjects or categories of subjects:
  - personnel of the Proposing Organization;
  - other candidates.
- e) rights of the data subject: the data subject has the right to access their personal data and to exercise the rights outlined in Articles 15-22 of the GDPR, including the right to rectification, erasure ("right to be forgotten"), restriction of processing, data portability, and opposition to processing. These rights can be exercised by sending a request to the data controller at the contact details provided below;
- f) data retention period: the data will be retained for the time necessary to manage the tender procedure and, in case of an award, for the entire duration of the contractual relationship and for the period required by applicable regulations regarding the retention of administrative records;

- g) data controller: the data controller is CONSORZIO TUTELA VINI VALPOLICELLA, represented by its legal representative pro tempore;
- h) Data Protection Officer (DPO) The contact details for the Data Protection Officer (DPO) are as follows:
- Email: [amministrazione@consorziovalpolicella.it](mailto:amministrazione@consorziovalpolicella.it);
  - PEC: [info@pec.consorziovalpolicella.it](mailto:info@pec.consorziovalpolicella.it);
- i) complaint to the supervisory authority: The data subject has the right to lodge a complaint with the Data Protection Authority if they believe that the processing of their data violates the provisions of the GDPR.

## **16. Contractual expenses**

The stamp duty, drafting, registration, and any other ancillary expenses related to the Contract will be borne 50% by the Implementing Body awarded the contract and 50% by the Proposing Organisation.

## **17. Jurisdiction**

For the resolution of all disputes that may arise in the execution of the Contract, which cannot be settled amicably by the contracting parties, the competent court shall be that of Verona.