



# CONSORZIO TUTELA ROERO

## TECHNICAL CONDITIONS AND SELECTION PROCEDURE FOR THE IMPLEMENTING BODY OF THE PROGRAMME FOR THE INFORMATION AND PROMOTION OF AGRICULTURAL PRODUCTS IN THIRD COUNTRIES: USA - CANADA

*Approved by the Board of Directors of the Consorzio Tutela del Roero with Resolution of 28 November 2024*

*The English translation of this document is provided solely for convenience and ease of reference.  
In the event of any discrepancies or differences in interpretation between the Italian and English versions,  
the Italian version shall prevail and be the governing and binding text.*

### 1 Introduction and preliminary information

**The Consorzio di Tutela del Roero** (hereinafter the Contracting Body), with registered office in Canale (CN) – Via Sersheim, 2, VAT number and Tax Code 03480050040, has presented, as leader of a partnership that includes the Istituto Valorizzazione Salumi Italiani, a **three-year information and promotion program (2025 – 2026 – 2027)**, on Third Countries: USA - CANADA pursuant to EU Regulation No. 1144/2014 of the European Parliament and of the Council, in particular on the Call 2024 for simple programs and therefore

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pursuant to the reference articles of Reg. (EU) No. 1144/2014, Delegated Reg. (EU) No. 2015/1829, Implementing Reg. (EU) No. 2015/1831, a **call for tenders for the selection, through an Open Competitive Procedure, of an Implementing Body** in charge of the implementation of the actions (activities/initiatives) aimed at achieving the objectives set out in the **Programme submitted pursuant to EU Regulation no. 1144/2014 of the European Parliament and of the Council - Call 2024** and which, if the application is accepted, will take place in the following target countries: **USA** and **CANADA** and will concern the following EU name products:

Products
Roero DOCG
PDO and PGI cold cuts

Economic operators in possession of the requirements indicated in the above-mentioned EU Regulations, as specified in the following paragraphs, are invited to submit an offer in accordance with the indications contained in this "Technical Specification".

**It should be noted at this point that, since this call for proposals is aimed at the execution of a promotional program subject to an application for a contribution from the above funds, currently still in the evaluation phase, if the Consorzio di Tutela del Roero is not among the proposing organizations selected under the aforementioned Call for proposals, the award of the services covered by this tender will be considered worthless and ineffective. In this case, therefore, no obligation will remain with the Consorzio di Tutela del Roero, which cannot be the subject of any request for reimbursement or damages.**

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## 1.1 Regulatory framework

The framework of the essential regulatory references for the implementation of the Programme and of this procedure includes:

- **Regulation (EU) No 1144/2014 of the European Parliament and of the Council of 22 October 2014** on information and promotion measures concerning agricultural products carried out 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 and promotion measures concerning agricultural products carried out in 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 and promotion measures concerning agricultural products carried out in the internal market and in third countries;
- **Call for proposals** published by the RESEARCH EXECUTIVE AGENCY (REA) AGRI SIMPLE 2024;
- **Guidelines on the tender procedure** referred to in the European Commission note DDG1. B5/MJ/DB D(2016)321077 of 7 July 2016;
- **Guidelines on the tender procedure** Decree of the Director General of the Ministry of Agriculture, Food Sovereignty and Forestry PQAI 05 Prot. No. 532478 of 10/10/2024

The Consorzio di Tutela del Roero **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 transposing the European Directives on public procurement (in Italy Legislative Decree 36/2023). However, the Consortium must carry out the selection of 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 indicated in the aforementioned Guidelines and decisions of the European Commission and the Ministry of Agriculture and Food Sovereignty and Forestry.

**Directive 2014/24/EU and Legislative Decree 36/2023 will therefore only be applied 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 envisaged with 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 lots, as it is more efficient and effective for the execution of the service, the identification of a single contractor, who can carry out all the activities envisaged by the Program in question.



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

## 2. Main project information

### Products subject to promotion:

Products
Roero DOCG
PDO and PGI cold cuts

**Contracting body:** Consorzio di Tutela del Roero

**Titolo del progetto:** “*Sip and Savor: Pairing European Wines and Deli Meat*”

**Target countries:** USA and Canada

### Target groups:

- Industry Practitioners (including Wine Educators and Sommellerie Students)
- Journalists and content creators
- Consumers (Gen X)

**General objective:** The project has identified 3 objectives: two are aimed at an informative return, linked to the recognition of the logos of the Union quality schemes, the merits of Union products and the increase of awareness of the intrinsic values of Union products; one economic, to increase exports to both countries.

### INFORMATION RETURN OBJECTIVES

- 1) Increasing the level of recognition of Union quality schemes
- 2) Raising awareness of the intrinsic values/merits of EU agricultural products

### ECONOMIC RETURN OBJECTIVE

- 3) Increase the value of exports of testimonial products to target countries

**Strategy:** The main challenges in North America, for both product categories, are represented by uncertainties and changes in consumption habits (health trends), by the little or no knowledge of the Union quality brands and the merits of these products (especially for cured meats, also considering that local competitors have very low prices) and by Agopiracy. The strategy therefore aims to improve the penetration, knowledge and positioning of the products covered by the proposal, where authenticity and being European become decisive factors. From a geographical point of view, considering the size of the target countries, it was decided to concentrate activities primarily on a few states (in the USA) and provinces (in Canada) considered the most significant both in terms of demographics and consumption trends of imported products.

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**Work Packages (WPs) and activities that must be included in the proposals**, according to the procedures described in detail in the technical specifications:

- ✓ WP 2 - Public Relations
- ✓ WP 3 - Web site, Social media
- ✓ WP 4 - Advertising
- ✓ WP 5 - Communication tools
- ✓ WP6 – Events

In paragraph 5 of these specifications, more details and information relating to the aforementioned WPs are indicated.

**Duration of the Programme:** 36 months (3 annual phases), with indicative start on 1 February 2025.

**Budget of the actions of the executing body:** it should be noted that the parties interested in participating in this call for tenders must submit an offer taking into consideration the **total budget of € 2,372,435.00 plus VAT** in accordance with the law, including the **costs relating to the implementation of the project activities and the remuneration of the implementing body** (fee of the economic operator). Therefore, this amount must also include the fee of the economic operator, while it does not include other costs that will be borne directly by the proposing organizations.

The indicative breakdown of the budget on the target countries is as follows:

Target country	Amount (€)
USA	1.432.501,00€
CANADA	939.934,00€
<b>TOTAL</b>	<b>2.372.435,00€</b>

Please refer to paragraph 5 below for more details.



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## **TECHNICAL SPECIFICATIONS**

### **3 Subject matter of the contract**

#### **3.1 General description of the service**

The service consists of the implementation of the Information and Promotion Programme.

The Implementing Body will therefore have to ensure:

- the development of the work packages that make up the three-year Programme, starting with the signing of the contract between the contracting body and the Implementing Body;
- the operational activation of the promotional actions and activities envisaged for the period established by the Programme, on the basis of the objectives set out in the strategy, also through the constant monitoring of the activities carried out and their effects;
- the financial-administrative management of the work packages that make up the Programme, including the periodic technical reports, the final technical report and all the documentation necessary for reporting.

The service must be characterized by qualified technical and operational support, a high quality of the products made, and stand out for the innovativeness of the messages, the tools with which to convey them and the methods of involving the target audience. The development and execution of the agreed activities of the Programme must be carried out in a manner consistent with the general and specific objectives and the communication strategy, taking into account the Priorities and objectives of EU Reg. 1144/2014, ensuring clear recognition of the Programme and its promoters.

#### **3.2 Method of execution**

The Implementing Body must set up and arrange, for the duration of the contract, a Working Group, in compliance with the participation requirements, which is responsible for managing and implementing the Programme. All the activities of the Working Group must be agreed and shared with the Contracting Body.

It is envisaged that one or more members of the Working Group are available for periodic monitoring meetings at the headquarters of the contracting body, to give operational support to the activities of the plan that need to be carried out in close coordination with the reference structure. The coordination and exchange of information with the contracting authority may also include different and articulated methods: 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 to the services entrusted with integrated personnel with legitimate employment relationships and having the professional and technical requirements



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appropriate to the use and implementation of the project. The working group must be characterized by a flexible organizational approach to respond to variations and/or unforeseen events, to the needs that may arise during the performance of the activities.

In particular, the staff of the dedicated working group must possess a range of skills in the following areas, listed by way of example and not exhaustively: communication, organization of events and fairs, knowledge and experience of activities carried out in relation to the target market of the project, press office, project management, digital web and social management, graphics, etc. In addition, the Implementing Body must provide for adequate monitoring of the results.

The Enforcement Body, for the duration of the contract, undertakes to:

- a) set up and make available an adequate project team (the people who will directly deal with the work to be carried out), in compliance with the participation requirements; which will be defined in agreement with the contracting party;
- b) agree and share all team activities with the contracting party;
- c) to assign suitable personnel of proven ability, honesty, morality and proven confidentiality to the service, who must maintain the most absolute confidentiality about what they have come to know in the performance of the service;
- d) guarantee the stability and continuity of the service in all circumstances, ensuring staff quantitatively and qualitatively adequate to the needs and in compliance with the contents of the technical offer;
- e) respect, with regard to its staff, the employment contracts relating to wage, regulatory, social security and insurance treatment;
- f) provide for a Project Referent who attends the monitoring meetings at the client's headquarters (these will have a periodicity defined by the client), to give operational support to the activities of the Programme;
- g) to prepare all possible means of communication that can simplify the coordination, monitoring and control of the Programme.

## 4 Duration of Service

The contract relating to the service will have as its object the performance of the activities indicated in these technical specifications, under the conditions set out therein and will be signed after the signing, by the proposing party, of the Grant Agreement with the Member State and the Paying Agency (AGEA).

The executing body undertakes to perform the services for the duration and within the deadlines provided for by the Convention, by these technical specifications, by the timetable and, unless otherwise provided, according to the timing indicated by the contracting body. The service will have the duration of the project and for a total of thirty-six months starting from the date of signing the contract.

The contracting authority reserves the right to cancel the service with at least three months' notice by registered mail with acknowledgement of receipt or certified email in the event of non-compliance with the provisions of this deed.



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The contracting authority reserves the right to request a postponement of the term of execution of the service for a maximum of 6 months, in order to ensure the completion of the activities envisaged by the Programme, under the same economic conditions.

## 5 Types of activities and initiatives envisaged by the Programme

The activities and initiatives (Work Package – WP) that make up the Promotional Program are similar to the classic ones of information and promotion of high quality agricultural and food and wine products, taking into account the issues to be dealt with and the objectives listed above and fall into the following categories:

- WP2 – Public Relations
- WP3 – Web site, Social media, creation of virtual groups and communities
- WP4 – Advertising
- WP5 – Communication tools
- WP6 – Events

The goal is to expand the presence of testimonial products on the US and CANADA markets.

### The target subjects

- Industry Practitioners (including Wine Educators and Sommellerie Students)
- Journalists and content creators
- Consumers (Gen X)

The information and promotional activities that will make up the proposals submitted in the context of this selection procedure are set out below.

It is required that the offer be accompanied by a presentation of the general strategy of the programme on the basis of the information provided in art. 2:

The strategy is required to:

- Ability to respond to the information needs of the targets;
- Communicative effectiveness of the message and contents;
- Ability to involve target subjects;

For each individual WP developed, the expected results and a specification of the implementation methods are required. It should be noted that there are no budget shifts between WPs or between activities.

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## Work Package 2

<b>Work package 2: PUBLIC RELATIONS</b> (identical to the titles in the detailed table of the financial envelope)					
Ensure consistency with the detailed table of the financial envelope (where applicable).					
<b>Duration:</b>		M3 – M36			
<b>Objectives:</b> List the specific objectives to which this work package is linked.					
<ul style="list-style-type: none"> <li>▪ Objectives 1.2</li> </ul>					
<b>Activities and division of labour (description of the work programme)</b>					
<p>Provide a concise and precise overview of the job (planned tasks), specifically assigning an abbreviation and a number to each task. Indicate which audiences the work package activities are aimed at. Specify who will be involved in each task: coordinator (COO), beneficiaries (BEN), subcontractors (if subcontracting is envisaged), indicating in bold the main person responsible for the task. Add information about the involvement of other participants in the project (e.g. in-kind contributions).</p> <p><b>NB:</b> Contributions in kind for consideration are allowed (contributions in kind free of charge are not prohibited, but they do not affect costs; in other words, they cannot be declared as expenses). Please state clearly whether the in-kind contributions are paid or free of charge.</p> <p>The coordinator is fully responsible for the coordination tasks, even if these are delegated to others. The tasks of the coordinator may not be subcontracted.</p> <p>In case of subcontracting, please also fill in the table below.</p>					
Task No. (sequential numbering relative to WP)	Task Naming	Description (including recipient country/city)	Participants		Contributions in kind or subcontracting (Yes/No and which ones)
			Name	Role (COO, BEN, AE, AP, OTHER)	
T2.1	PUBLIC RELATIONS OFFICE: in the USA and Canada (B2B)	1 press office will be activated (M3-36) in the USA and 1 in Canada, to develop solid relationships with the (traditional and online) sector and generalist media. After the collection of a carefully profiled mailing list of 5,000 contacts in the USA and 4,000 in Canada, the project press kit will be prepared. The central action will then be the drafting and sending of press releases and notes. PR will then be fundamental.	TBD (TBD)	<b>OTHER</b> : executing body (EE)	YES, subcontracting to the executing body (EE)
T2.2	PRESS EVENT: in USA e Canada	In both countries, 2 press events are planned per year 1 (M 7-8-9), aimed at an audience of journalists and content creators. <b>In the USA</b>	TBD	<b>OTHER</b> :	YES, subcon

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	(B2B)	the events will take place in NY and Los Angeles or Chicago and will be aimed at about 35 guests each, while <b>in Canada</b> the events will be in Montreal and Toronto and will include about 25 guests each. For the success of the event, both the support of a chef and a professional sommelier will be essential, so as to involve content creators in particular, in the creation of high-engagement content.	<b>ROERO</b> IVSI	executing body  <b>KOS</b> WELL	tracting to the executing body  No, travel costs (C1)
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**Results and estimated budget** List the results for each year. Refer to the main results only. Do not include subheadings, internal work documents, meeting minutes, etc. Limit the number of results to a maximum of 10 per year. Indicate the financial allocation for each year (ensure consistency with the detailed table of the financial envelope).

Calendar	YEAR 1			YEAR 2			YEAR 3		
<b>Results</b>	1 mailing list in USA. e 1 in Canada 10 press releases in the USA 6 press releases in Canada 1 press review in the USA 1 press review in Canada 2 press events in the USA 2 press events in Canada			12 press releases in the USA 8 press releases in Canada 1 press review in the USA 1 press review in Canada			12 press releases in the USA 8 press releases in Canada 1 press review in the USA 1 press review in Canada		
<b>Subtotal for Activity 2</b>			ANNO 1	ANNO 2	ANNO 3		ANNO 1	ANNO 2	ANNO 3
	USA		49.155,00 €	51.980,00 €	51.980,00 €	CANADA	24.408,00 €	28.702,00 €	28.702,00 €
			47.912,00 €	- €	- €		38.646,00 €	- €	- €
and/or									
<b>Total for WP</b>	WP 2	USA	97.067,00 €	51.980,00 €	51.980,00 €	CANADA	63.054,00 €	28.702,00 €	28.702,00 €

### Work Package 3

**Work package 3: WEBSITE, SOCIAL MEDIA** (identical to the headings in the detailed table of the financial envelope)

Ensure consistency with the detailed table of the financial envelope (where applicable).

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<b>Duratio n:</b>	M4 – M36				
<b>Objectives:</b> <i>List the specific objectives to which this work package is linked.</i>					
▪ Objectives 1.2					
<b>Activities and division of labour (description of the work programme)</b>					
<p><i>Provide a concise and precise overview of the job (planned tasks), specifically assigning an abbreviation and a number to each task. Indicate which audiences the work package activities are aimed at. Specify who will be involved in each task: coordinator (COO), beneficiaries (BEN), subcontractors (if subcontracting is envisaged), indicating in bold the main person responsible for the task. Add information about the involvement of other participants in the project (e.g. in-kind contributions).</i></p> <p><b>NB:</b> <i>Contributions in kind for consideration are allowed (contributions in kind free of charge are not prohibited, but they do not affect costs; in other words, they cannot be declared as expenses). Please state clearly whether the in-kind contributions are paid or free of charge.</i></p> <p><i>The coordinator is fully responsible for the coordination tasks, even if these are delegated to others. The tasks of the coordinator may not be subcontracted.</i></p> <p><i>In case of subcontracting, please also fill in the table below.</i></p>					
Task No.	Task Naming	Description (including recipient country/city)	Participants		Contributions in kind or subcontracting (Yes/No and which ones)
			Name	Role	
T 3.1	WEBSITE: in the United States and Canada (B2C)	At the beginning of Year 1, the campaign website will be created, in English and French and with a .eu domain. structured with sections dedicated to the project and its messages, products, territories and production methods, proposing organizations, and a constantly updated news and events section. There will also be some specific sections dedicated to project activities: initiatives for operators and a download area of the material. The Restaurant week section, from the second year, will collect the list of restaurants participating in the initiative. On a technical level, the site will be in wordpress or cms. The texts will be written from an SEO perspective.	TBD	<b>OTHER</b> : executi ng body	YES, subcontract ing to the executing body

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<b>Total for WP</b>	WP 3	USA	74.128,00 €	39.663,00 €	39.663,00 €	CANADA	68.704,00 €	33.561,00 €	33.561,00 €
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## Work Package 4

### Work package 4: ADVERTISING (identical to the headings in the detailed table of the financial envelope)

Ensure consistency with the detailed table of the financial envelope (where applicable).

**Duration:** M6 – M36

**Objectives:** List the specific objectives to which this work package is linked.

- Objectives 1,2,3

#### Activities and division of labour (description of the work programme)

Provide a concise and precise overview of the job (planned tasks), specifically assigning an abbreviation and a number to each task. Indicate which audiences the work package activities are aimed at. Specify who will be involved in each task: coordinator (COO), beneficiaries (BEN), subcontractors (if subcontracting is envisaged), indicating in bold the main person responsible for the task. Add information about the involvement of other participants in the project (e.g. in-kind contributions).

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In case of subcontracting, please also fill in the table below.

Task No.	Task Naming	Description (including recipient country/city)	Participants		Contributions in kind or subcontracting (Yes/No and which ones)
			Name	Role	
T 4.1	ADV ONLINE in the United States (B2B and B2C) and Canada	For American and Canadian consumers, Facebook, Instagram Ads and Google Ads campaigns will be activated through the sponsorship of banners, slideshows, videos and posts. Then there will be proximity advertising which, with the restaurant weeks, in years II and III will be activated on social media, to create geotargeted campaigns. In Canada, a campaign will be activated every year with Wine&Travel Italy for the creation of at least 10 online contents. Given the importance of operators in the USA, online advertising will be provided in	TBD	<b>OTHER:</b> executing body	YES, subcontracting to the executing body

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		collaboration with reference B2B magazines such as Wine Enthusiast ogni for the wine sector and the BNP Media group for the food sector. These campaigns will include banners, blog posts, and inclusion in newsletters.							
<b>Results and estimated budget</b> <i>List the results for each year. Refer to the main results only. Do not include subheadings, internal work documents, meeting minutes, etc. Limit the number of results to a maximum of 10 per year. Indicate the financial allocation for each year (ensure consistency with the detailed table of the financial envelope).</i>									
<b>Calendar</b>	<b>YEAR 1</b>	<b>YEAR 2</b>	<b>YEAR 3</b>						
<b>Results</b>	1 Meta ads campaign in the US 1 Meta ads campaign in Canada 1 Google ads campaign in the USA 1 Google ads campaign in Canada 1 campagna con Wine&Travel Italy in Canada 1 campaign with Wine Enthusiast in the USA 1 campaign with BNP media in the USA	1 Meta ads campaign in the US 1 Meta ads campaign in Canada 1 Google ads campaign in the USA 1 Google ads campaign in Canada 1 campagna con Wine&Travel Italy in Canada 1 campaign with Wine Enthusiast in the USA 1 campaign with BNP media in the USA	1 Meta ads campaign in the US 1 Meta ads campaign in Canada 1 Google ads campaign in the USA 1 Google ads campaign in Canada 1 campagna con Wine&Travel Italy in Canada 1 campaign with Wine Enthusiast in the USA 1 campaign with BNP media in the USA						
<b>Total for WP</b>	WP 4	USA	71.755,00 €	71.755,00 €	71.755,00 €	CANADA	28.250,00 €	28.250,00 €	28.250,00 €

## Work Package 5

<b>Work package 5: COMMUNICATION TOOLS</b> <i>(identical to the headings in the detailed table of the financial envelope)</i>	
<i>Ensure consistency with the detailed table of the financial envelope (where applicable).</i>	
<b>Duration:</b>	M1 – M30
<b>Objectives:</b>	<i>List the specific objectives to which this work package is linked.</i>
	▪ Objectives 1.2
<b>Activities and division of labour (description of the work programme)</b>	

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Provide a concise and precise overview of the job (planned tasks), specifically assigning an abbreviation and a number to each task. Indicate which audiences the work package activities are aimed at. Specify who will be involved in each task: coordinator (COO), beneficiaries (BEN), subcontractors (if subcontracting is envisaged), indicating in bold the main person responsible for the task. Add information about the involvement of other participants in the project (e.g. in-kind contributions).

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In case of subcontracting, please also fill in the table below.

Task No.	Task Naming	Description (including recipient country/city)	Participants		Contributions in kind or subcontracting (Yes/No and which ones)
			Name	Role	
T5.1	COMMUNICATION TOOLS in the United States and Canada (B2B and B2C)	In months 1-3, a visual identity will be developed with the aim of making the campaign and its products easily recognizable. The visual identity will take into account the indications of the Union on the use of trademarks and the indication of origin (art. 2 Reg. 2015/1831). Material production starting in month 4 will be: <ul style="list-style-type: none"> <li>- Consumer flyer in English and French</li> <li>- Brochure for operators in English and French</li> <li>- each restaurateur of the Restaurant Week will be sent a kit with which to customize their location, containing: roll-ups, window stickers, knights, customized placemats for the first evening / event.</li> <li>- the production of gadgets will be used for operators who with consumers</li> </ul> For press dinners only in year 1, press kits will then be provided in which to insert the press kit.	TBD	OTHER: executing body	YES, subcontracting to the executing body
T5.2	VIDEO in the United States and Canada (B2C)	The first year (M5-9) will produce 10 short videos 20"-30" on the campaign, its values, products with pairing and serving tips. The videos will be entirely shot in the studio, with the presence of a model (especially for serving tips)	TBD	OTHER: executing body	YES, subcontracting to the

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		and will be in vertical format so as to become reels whose graphics will be provided in 2 versions, English and French for Québec.								executing body
<b>Results and estimated budget</b> <i>List the results for each year. Refer to the main results only. Do not include subheadings, internal work documents, meeting minutes, etc. Limit the number of results to a maximum of 10 per year. Indicate the financial allocation for each year (ensure consistency with the detailed table of the financial envelope).</i>										
<b>Calendar</b>	<b>YEAR 1</b>	<b>YEAR 2</b>			<b>YEAR 3</b>					
<b>Results</b>	120 press kits 15,000 consumer flyers 1,200 brochure for operators 900 Operator Gadgets 3,000 consumer gadgets 10 videos in English 10 videos in French	45,000 consumer flyers 1,300 operator brochures 1,000 Operator Gadgets 4,700 consumer gadgets 15 restaurant kit			50,000 consumer flyers 1,500 operator brochures 1,300 Operator Gadgets 6,700 consumer gadgets 15 restaurant kit					
<b>Subtotal for activity 5</b>			ANNO 1	ANNO 2	ANNO 3		ANNO 1	ANNO 2	ANNO 3	
	WP 5.1	USA	24.521,00 €	12.543,00 €	23.617,00 €	CANADA	26.555,00 €	17.402,00 €	12.317,00 €	
	WP 5.2		11.639,00 €	- €	- €		11.639,00 €	- €	- €	
and/or										
<b>Total for WP</b>	WP 5	USA	36.160,00 €	12.543,00 €	23.617,00 €	CANADA	38.194,00 €	17.402,00 €	12.317,00 €	

## Work Package 6

<b>Work package 6: EVENTS</b> <i>(identical to the titles in the detailed envelope table)</i>	
<i>Ensure consistency with the detailed table of the financial envelope (where applicable).</i>	
<b>Duration:</b>	M7 – M36
<b>Objectives:</b> <i>List the specific objectives to which this work package is linked.</i>	<ul style="list-style-type: none"> <li>▪ Objectives 1,2,3</li> </ul>
<b>Activities and division of labour (description of the work programme)</b>	

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Provide a concise and precise overview of the job (planned tasks), specifically assigning an abbreviation and a number to each task. Indicate which audiences the work package activities are aimed at. Specify who will be involved in each task: coordinator (COO), beneficiaries (BEN), subcontractors (if subcontracting is envisaged), indicating in bold the main person responsible for the task. Add information about the involvement of other participants in the project (e.g. in-kind contributions).

**NB:** Contributions in kind for consideration are allowed (contributions in kind free of charge are not prohibited, but they do not affect costs; in other words, they cannot be declared as expenses). Please state clearly whether the in-kind contributions are paid or free of charge.

The coordinator is fully responsible for the coordination tasks, even if these are delegated to others. The tasks of the coordinator may not be subcontracted.

In case of subcontracting, please also fill in the table below.

Task No.	Task Naming	Description (including recipient country/city)	Participants		Contributions in kind or subcontracting (Yes/No and which ones)
			Name	Role	
T 6.1	TRADE FAIR STANDS in the United States and Canada (B2B)	2 fairs in the USA and 1 in Canada were chosen. The campaign will participate in these with a space of about 20 square meters, where product tastings and wine tastings can be offered with dedicated staff, B2B meetings (at least 10 for each fair), and material can be distributed. In the USA, the chosen fairs are the PLMA Private Label Trade Show (for years 1 and 3) and the IDDBA (for years 2 and 3). In Canada, on the other hand, the most interesting fair for the sector is SIAL CANADA which takes place in alternating years in Montreal and Toronto in May, for this reason it will be scheduled starting from year 2.	TBD  ROERO IVSI	OTHER: executin g body  KOS WELL	YES, subcontracting to the executing body No, travel costs (C1)
T 6.2	SEMINARS, B2B, ETC.: Masterclasses and walk around tastings for operators in the United States and Canada (B2B)	Masterclass (M7-9; M15-16; 19-20; 26-27; 31-33): for about 30 operators, which will include: a 1-hour training part followed by a tasting of the products that will end with a light dinner. The event will be held by a wine educator and/or an expert butcher/chef. In the USA the masterclasses will be n.1 in years 1-2 and n.2 masterclasses in year 3 in conjunction with each of the fairs. Also in the USA, year 1 the collaboration with Wine Enthusiast will be	TBD  ROERO IVSI	OTHER: executin g body  KOS	YES, subcontracting to the executing body

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		<p>expanded with participation in one of the advanced training Masterclasses, intended for a parterre of about 35/40 top operators and OLs. In Canada, the Masterclasses will be held in conjunction with other project events such as SIAL but also in specific cities (Montreal, Toronto, Ottawa, Vancouver) and will be No. 3 in year 1 and No. 2 in year 2-3.</p> <p>Walk around tasting (M31): at the peak of year 3 a walk around tasting will be organised for around 150 American operators. The event will take place in New York with over 40 stations where guests will be able to taste the wines of the countryside, accompanied by a catering that will make ad hoc combinations with cured meats. The event will take place in autumn 2027. The event will have an expert presenter and will include the participation of P.O.s and companies.</p>		WELL	No, travel costs (C1)
T 6.3	SEMINARS, B2B, ETC: Activities with sommelier schools in the United States and Canada (B2B)	<p>In the USA every year 2 lessons will be organized in 2 important wine schools: the Wine Scholar Guild in New York and the San Francisco Wine School (M7-8; 19-20). Each lesson will be held by a wine expert from the institute and will include both a theoretical part and a practical tasting of 10/15 wines paired with some cured meats in which 50 guests will participate. Year 3 (M 30-34) the training activity will include, in addition to the 2 institutes, collaborations with 5 sommelier associations in the States of New York, Florida and California, which will include the organization of training lessons for members held by internal teachers. In Canada, on the other hand, the activity will be concentrated in the first year and will include the organization of 4 theoretical/practical lessons with the National Sommelier Association that will each involve 40 sommeliers. Classes can take place between months 7 and 12 in</p>	TBD	OTHER: executing body	YES, subcontracting to the executing body

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		the main cities of the country: Montreal, Toronto or Vancouver and Ottawa.			
T 6.4	TASTING WEEKS IN RESTAURANTS in the United States and Canada (B2C)	From the second year (M19-21 M31-33) weeks will be organized in restaurants in 1 city in the USA and 1 in Canada: Los Angeles and Montreal (year 2) and New York and Toronto (year 3) and will involve 5 restaurants in the USA and 10 in Canada for at least 2 weeks. Each restaurant will design a menu of at least 3 courses with cured meats paired with wines from the countryside. In the first days of promotion, a dinner event will be organized in which this menu and the campaign will be presented to a selection of customers (on average 50) also thanks to the presence of a cured meat expert and a wine educator. For this first dinner, ad hoc materials and gadgets will be provided.	TBD	OTHER: executing body	YES, subcontracting to the executing body
T 6.5	SPONSORSHIP OF B2B EVENTS IN THE US: TEXSOM	From year 2 it is planned to participate in TEXOM: a multi-stage B2B event that takes place in Texas, involving more than 250 operators and specialists in the wine sector. The wines of the campaign will be the protagonists of a first Lancheon business that will take place a few months before for about 20 selected operators (May) of the main conference in August, in which the campaign will be present with 1 promotional desk.	TBD  ROERO	OTHER: executing body  KOS	YES, subcontracting to the executing body No, travel(C1)
T 6.6	Sponsorship of B2C events in the United States and Canada: AWS, NYCWFF and SALON DES VINS D'IMPORTATION PRIVEE	In the USA, the campaign will collaborate with the American Wine Society (AWS). The most important event of the AWS is the National Conference, within it as a sponsor the campaign (in years 2 and 3) will benefit from great visibility on the information channels of the Association, distribute its material, and will be present with a	TBD	OTHER: executing body	YES, subcontracting to the executing body

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		<p>tasting desk, will participate with a short speech. The national conference takes place each year at a different location in November. The New York City Wine and Food Festival (NYCWFF) takes place every year in October. As a sponsor, in addition to the presence on the materials of the event, the campaign in year 3 will be present with a stand of about 10 square meters, a chef and an expert sommelier will animate the stand with tastings and distributing material and gadgets.</p> <p>In Canada, the RASPIPAV, with the support of the SAQ, organizes the SALON DES VINS D'IMPORTATION PRIVEE. The campaign as a partner will be present in years 1 and 2 at the tasting counters, to meet a large audience of OL and qualified consumers, distribute gadgets and material and propose testimonial products.</p>	ROERO IVSI	KOS WELL	No, travel costs (C1)
T 6.7	Study trips from the United States and Canada (B2B)	Year 1 (for Canada and the USA) and year 2 (only for the USA) will be organized a tour in Roero for about 10 OL from the USA and 4 from Canada, lasting 4/5 days for journalists, bloggers and operators. The tour will include meetings with producers, visits, visits to cellars and tastings. Tours will be organized every year in September.	TBD	OTHER: executing body	YES, subcontracting to the executing body
<p><b>Results and estimated budget</b> List the results for each year. Refer to the main results only. Do not include subheadings, internal work documents, meeting minutes, etc. Limit the number of results to a maximum of 10 per year. Indicate the financial allocation for each year (ensure consistency with the detailed table of the financial envelope).</p>					
<b>Calendar</b>	<b>YEAR 1</b>	<b>YEAR 2</b>	<b>YEAR 3</b>		
<b>Results</b>	<p>1 participation in the PLTS in the USA</p> <p>2 masterclass in USA e 3 in Canada</p> <p>2 lessons with wine school in USA</p>	<p>1 participation in the IDDBA in the USA</p> <p>1 participation in SIAL Canada</p> <p>1 masterclass in USA e 2 in Canada</p> <p>2 lessons with wine school in USA</p>	<p>2 participations in trade fairs in the USA (1 PLTS and 1 IDDBA)</p> <p>1 participation in SIAL Canada</p> <p>2 masterclass in USA e 2 in Canada</p> <p>1 walk around tasting in USA</p>		

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	<p>4 lessons with Sommelier Associations in Canada 1 sponsorship of the Salon de Vins RASPIPAV 1 study trip dagli USA 1 study trip dal Canada</p>	<p>70 days of restaurant week in the USA 140 days of restaurant week in Canada 1 Sponsorship of Teksom 1 AWS conference sponsorship 1 sponsorship of the Salon de Vins RASPIPAV 1 study trip dagli USA</p>	<p>7 lessons with wine schools and sommelier associations USA 70 days of restaurant week in the USA 140 days of restaurant week in Canada 1 Sponsorship of Teksom 1 AWS conference sponsorship 1 NYCWFF sponsorship</p>					
<b>Subtotal for Activity 6</b>		ANNO 1	ANNO 2	ANNO 3		ANNO 1	ANNO 2	ANNO 3
	WP 6.1 PLTS	33.561,00 €	- €	33.561,00 €	CANADA	- €	- €	- €
	WP 6.1 DOBA	- €	50.737,00 €	50.737,00 €		- €	- €	- €
	WP 6.1 SIAL	- €	- €	- €		- €	37.290,00 €	37.290,00 €
	WP 6.2. Masterclass	18.080,00 €	18.080,00 €	36.160,00 €		58.308,00 €	38.872,00 €	38.872,00 €
	WP 6.2. Masterclass Wine Entusiast	49.720,00 €	- €	- €		- €	- €	- €
	WP 6.2. Walk around tasting	- €	- €	79.100,00 €		- €	- €	- €
	WP 6.3	22.826,00 €	22.826,00 €	36.838,00 €		42.488,00 €	- €	- €
	WP 6.4	- €	55.257,00 €	55.257,00 €		- €	80.117,00 €	80.117,00 €
	WP 6.5	- €	22.261,00 €	22.261,00 €		49.042,00 €	49.042,00 €	- €
	WP 6.6	- €	24.521,00 €	85.202,00 €		- €	- €	- €
WP 6.7	36.725,00 €	36.725,00 €	- €	19.549,00 €		- €	- €	
		and/or						
<b>Total for WP</b>	USA	160.912,00 €	230.407,00 €	399.116,00 €	CANADA	169.387,00 €	205.321,00 €	156.279,00 €

## Indicators of project implementation and result:

The table of implementation and result indicators included in the project proposal is shown. This table of indicators must be a reference in the preparation of the technical offer that contains an indication of the expected KPIs, as the promotion program at the end of the three years must achieve the results indicated below.

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WP	Output indicators	Result indicators
Work package 2	<p>1 mailing list in USA. e 1 in Canada            34 press releases in the USA            22 press releases in Canada            3 press review in the USA            3 press review in Canada            2 press events in the USA            2 press events in Canada</p>	<p>5,000 contacts on the US mailing list            4,000 contacts on the Canada mailing list            1,200 free items in the U.S.            900 free items in Canada            70 participants at press events in the USA            50 attendees at press events in Canada</p>
Work package 3	<p>1 website in 2 languages            Constant updating of the website            2 account Facebook,            2 account Instagram            1 account Youtube            Continuous social media animation            3 webinar USA            3 webinar Canada</p>	<p>62,000 website visitors            40.000 follower sui social media in USA            25.000 follower sui social media in Canada            100 subscribers to the Youtube channel            15.000 positive reaction            25.000 views totali dei webinar USA            20.000 views totali dei webinar Canada</p>
Work package 4	<p>3 Meta ads campaigns in the US            3 Meta ads campaigns in Canada            3 Google ads campaigns in the USA            3 Google ads campaigns in Canada            3 campagne con Wine&amp;Travel Italy in Canada            3 campagne con Wine Enthusiast in USA            3 campaigns with BNP media in the USA</p>	<p>24,000,000 impressions from the ad on Meta and Google in USA            9,000,000 impressions from the ad on Meta and Google in Canada            300,000 impressions of content on Wine&amp;Travel            3,300,000 impressions from industry portals in the USA</p>
Work package 5	<p>120 press kits            110,000 consumer flyers            4,000 brochure for operators</p>	<p>100% distribution of material to the Operators            95% material distribution for</p>

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	<p>3,200 Operator Gadgets 14,400 consumer gadgets 30 restaurant kits 10 videos in English and 10 videos in French</p>	<p>Consumers 20,000 average views of each video</p>
Work package 6	<p>2 PLTS appearances in the USA 2 IDDBA appearances in the USA 2 participations in SIAL Canada 5 masterclass in USA 1 walk around tasting in USA 7 masterclass in Canada 6 lessons with wine schools in USA 5 lessons with Sommelier Associations in the USA 4 lessons with Sommelier Associations in Canada 140 giornate di restaurant week in USA 280 days of restaurant week in Canada 2 sponsorships of TEXSOM in the USA 2 sponsorships of the AWS conference in the USA 1 NYCWFF sponsorship in the USA 2 sponsorships of the Salon des Vins RASPIPAV 2 study trip dagli USA 1 study trip dal Canada</p>	<p>4,600 operators reached at US trade fairs 40 B2B meetings held at US trade shows 2,100 operators reached at SIAL Canada 20 B2B meetings held at SIAL Canada 155 operators at masterclasses in the USA 150 ospiti al walk around tasting in USA 210 operators at masterclasses in Canada 300 participants in the lessons in the Wine Schools in the USA 500 sommeliers participating in classes in the USA 160 sommeliers participating in the lessons in Canada 22,000 consumers reached in the U.S. 44,000 consumers reached in Canada 500 operators met at Texsom 1,200 consumers met with AWS 5,000 foodies met at NYCWFF 15,400 guests met at the Salon des Vins RASPIPAV (including 3,000 professionals) 20 study trip guests from the USA 4 study trip guests from Canada</p>

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## **PROCEDURE FOR SELECTING THE PROGRAMME IMPLEMENTING BODY**

### **6. Requirements for participation in the tender**

Economic operators may participate in this tender individually or in association, provided that they meet the requirements prescribed by the following articles.

It is forbidden for the competitor who participates in the race in an associated form to participate even individually.

In the case of associated participation, the subsequent requirements referred to in art. 6.1 must be held by all participants at the time of submission of the bid.

#### **6.1 No grounds for exclusion from participation in the tender**

Participation in this tender procedure is reserved for economic operators who, on the date of submission of the bid, declare that there are no grounds for exclusion pursuant to Directive 2014/24/EU, or grounds 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 grounds for exclusion must be certified by means of the attached declaration (**Annex B**), signed by the legal representative.

In the case of a temporary grouping that has not yet been established, each operator must produce this declaration.

#### **6.2 Economic and financial standing requirements**

The economic operator who intends to participate in this selection tender: must have achieved, in the three-year period 2021-2022-2023, a total global turnover of not less than **€ 2,500,000** (in words: Euro two million five hundred thousand/00) net of VAT, resulting from VAT returns or equivalent tax within the EU;

- must attach the declaration of the Banking Institution of possession by the Economic Operator of the financial means necessary to guarantee the execution of the actions envisaged by the Programme (suitable bank references);
- must attach a copy of the last approved financial statements and/or VAT return;
- must attach the Chamber of Commerce certificate or registration in a commercial register kept in the Member State where the economic operator is based.

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The possession of these requirements must be attested by means of the attached declaration (Annex B), signed by the legal representative. These requirements must be met by the economic operator as a whole, or as a subject in a temporary grouping of companies.

## 6.3 Technical and professional capacity requirements

The economic operator (individual or in a temporary group of companies) who intends to participate in this selection call must:

- have provided, in the three-year period 2021-2022-2023, services similar to those covered by the tender for a total amount of not less than Euro 2,000,000.00 (in words: Euro two million/00) net of VAT;
- attach the list of the main services performed (company CV);
- attach the CVs of the personnel employed, in the possible execution of the Programme, which show proven experience in services similar to those covered by the tender.

Similar services are defined (but not limited to):

- management of complex international promotion projects/programmes;
- management of groupings of companies and coordination of working groups;
- design and management of publicly funded programmes;
- event organization and incoming activities;
- press office management activities;
- communication, PR, etc. activities, including online;
- creation of information material;
- creation of promotional videos;
- promotional activities in the agri-food sector
- experience in communication activities on the theme of "sustainability"

The possession of these requirements must be attested by means of the attached declaration (Annex B) signed by the Legal Representative of the proponent and the sending of the CVs of the professional figures envisaged in the execution of the assignment. These requirements must be met by the economic operator or by the temporary group of undertakings as a whole, except that in the latter case the contractor must in any case meet the requirements and perform the services to a majority extent.

## 7 Selection Board and award criteria

The **Selection Committee is appointed after the deadline for the submission of tenders** and is composed of an odd number of up to a maximum of 5 members, experts in the specific field to which the subject of the contract refers.

The Selection Committee is responsible for evaluating the technical and economic offers of the competitors. The RUP avails itself of the assistance of the selection committee for the purpose of verifying the documentation produced and the anomaly of the tenders.

The contract is awarded on the basis **of the criterion of the best quality/price ratio**, according to the distribution of the scores described below.



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

QUALITY OF THE TECHNICAL OFFER: max 85 points	TOTAL SCORE THAT CAN BE AWARDED: max 100 points
ECONOMIC OFFER: max 15 points	

The **Selection 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 the technical offer

The Technical Offer must ensure the minimum requirements described in these technical specifications, must be formulated in such a way as to provide all the elements necessary for a complete and in-depth evaluation of the content and quality of the service proposed, the elaboration of which must be characterized by conciseness, concreteness and feasibility.

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

TECHNICAL OFFER: MAXIMUM 85 POINTS		
Policy	Sub-criteria	Maximum score
1. QUALITY OF THE TECHNICAL OFFER OVERALL STRATEGY	Adequacy of the proposal in terms of consistency with the objectives of the campaign and with respect to the timing of the programming.	Up to 5 points
	Ability to produce the expected results and achieve the objectives set by the project	Up to 5 points
		<b>Maximum 10</b>
2. QUALITY OF THE TECHNICAL OFFER PROJECT ACTIVITIES	Consistency of the communication concept suitable for ensuring the achievement of the objectives set in the Programme.	Up to 6 points
	Quality of the graphic proposal and concept	Up to 12 points
	Quality of the working group dedicated to the management of project activities (CV evaluation of the working group dedicated to the implementation of individual project activities)	Up to 12 points
		<b>Maximum 30</b>
3. QUALITY OF THE TECHNICAL OFFER METHODOLOGICAL APPROACH	Congruence in the methods of implementation and execution of the actions with the methods of execution of the activities and initiatives envisaged by the Programme	Up to 9 points
	Adequacy of planning in terms of consistency with the objectives of the communication strategy and consistency with respect to the timing of the programming: in particular, consistency between the timetable of the activities	Up to 7 points



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	and effectiveness of the implementation of the individual actions, also in relation to the professional resources involved	
	Adequacy of the control mechanisms to monitor the correct economic and financial execution of the project, compliance with the timetable and product and result indicators, and quality and effectiveness of the methods of execution of the activities envisaged by the Programme	Up to 13 points
	Quality in project coordination (CV evaluation of the professional in charge of coordinating project activities)	Up to 9 points
	Additional services/activities proposed to improve the service	Up to 3 points
	Modalities of interaction/assistance provided to beneficiaries	Up to 4 points
		<b>Maximum 45</b>
<b>Maximum score Technical Offer</b>		<b>85</b>

For the determination of the scores obtained 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 then multiplied by the maximum score that can be awarded in relation to the criterion), varying between 0 and 1. Therefore, each commissioner will justifiably assign a score to each offer according to the following grid:

not verifiable	0
Insignificant valuation	0,1
Just enough rating	0,2
Sufficient rating	0,3
evaluation between satisfactory / fair	0,4
Decent rating	0,5
Rating between fair/good	0,6
Good rating	0,7
Rating between good/excellent	0,8
Excellent rating	0,9
Excellent rating	1,0

For each sub-criterion, once each commissioner has assigned a coefficient to each competitor, the average of the coefficients assigned by the Selection Committee will be calculated, with a value of 1 to the highest coefficient among the bidders and consequently parameterizing all the other coefficients.

## 7.2 – Evaluation of the economic offer

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The economic offer must be structured in such a way as to be able to evaluate the different elements indicated in the following table.

ECONOMIC OFFER: MAXIMUM 15 POINTS		
Evaluation element	Motivational criterion	Maximum score
ECONOMIC OFFER Max 15 points	<b>Economic analysis:</b> Analysis of the cost-effectiveness of the proposed initiatives, according to market prices	Up to 7 points
	<b>Honorarium:</b> Assessment of the adequacy of the fee (expressed in man-days) and requested by the bidding economic operator for the implementation of each action, based on the cost of each action and the expected benefits	Up to 8 points
Maximum score that can be awarded		15

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

$$\text{score "economic offer for activities" considered} = \text{Offer X} \times \frac{\text{Maximum bid}}{\text{Maximum bid}} \times 7$$

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 ACTIVITY) of the economic operator considered.

As regards **the economic offer for the fee of the participating economic operator** (maximum of 8 points out of 100), the score will be awarded on the basis of the following formula:

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

where:

- Minimum % fee: is the lowest percentage of the fee relating to the economic offer for the fee of the participating economic operator among those submitted;
- Fee % X: is the percentage of the fee relating to the economic offer for the fee of the economic operator in question.

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

Increasing bids are not allowed.

The opening of the PEC C relating to the economic offer will take place at the end of the evaluation work carried out by the aforementioned Selection Committee.

On the basis of the scores attributed to the offers, the ranking will be drawn up.



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The award will be made in favour of the competitor who has submitted a bid that, in possession of all the minimum mandatory requirements, is found to have achieved the highest overall score (technical bid score + economic bid score).

In the event of a tie, the contract will be awarded to the competitor who has received the highest score in the technical offer.

In the event of a tie in both the economic and technical offers, a draw will be made among the aforementioned competitors.

The Contracting Authority is not required to pay any remuneration to competing companies, for any reason or title, for the bids submitted.

Once the required checks have been carried out on the possession of the prescribed requirements, the award will be made.

The award is immediately binding on the tenderer awarded the tender, while the contracting body will be definitively committed only when, in accordance with the law, all the consequent and necessary acts for the performance of the tender have achieved full legal effect.

In the event that the contractor does not appear for the stipulation of the contract or in which the falsity of the declarations made is ascertained, the contracting authority reserves the right to assign the task to the person subsequently placed in the ranking, once the usual checks have been completed.

The Consorzio di Tutela del Roero will proceed with the award even if only one valid bid is submitted, provided that it is congruous.

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

The results will be communicated via PEC (certified e-mail) to the participants and will be published on the website of the Consorzio di Tutela del Roero.

## 8 Presentation

### 8.1 Submission of proposals and deadline

Bodies 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 one of the two methods of their choice:

- PEC through 3 different certified e-mail messages (PEC) as indicated below;
- Mail or hand delivery with responsibility for delivery within the terms provided for in these specifications exclusively at the expense of the sender, in a sealed envelope containing 3 equally closed envelopes sealed with adhesive tape or other suitable means, containing the documentation in electronic format (CD or USB stick) as indicated below.

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## **PEC A/ENVELOPE A - administrative documentation, which must contain:**

- a) application for participation in the procedure according to the form in Annex A, completed and signed by the legal representative;
- b) the declarations required according to the form in Annex B, completed and signed by the legal representative;
- c) the declaration on the absence of conflicts of interest (Annex C);
- d) identity document of the subscriber(s);
- e) declaration by the Banking Institute of possession of the financial means necessary to guarantee the execution of the actions envisaged by the Programme (suitable bank references);
- f) Chamber of Commerce certificate or registration in a commercial register kept in the Member State where the economic operator is based;
- g) CV of the economic operator(s) interested in participating (company CV);
- h) copy of the last approved financial statements and/or VAT return

All documents must be signed by the legal representative of the economic operator participating in the selection procedure; in the case of a **temporary consortium already established**, the bid must be signed by the legal representative of the competitor designated as the Parent Company.

## **PEC B/ENVELOPE B - technical offer, which must contain:**

- a) technical report containing a detailed description of the activities using the references indicated in the following chapter: METHODS OF PREPARATION OF THE TECHNICAL OFFER - PEC B.
- b) Key-visual and key message, complete with presentation of the graphic proposal
- c) Presentation of the working group and CVs of the staff employed
- d) Methodological approach

**PEC C/ENVELOPE C - economic offer**, which must contain the indication of the economic offer for the activities (SUB-TOTAL ACTIVITY) and the fee of the economic operator considered according to the model described in the following chapter: METHODS OF PREPARATION OF THE ECONOMIC OFFER - PEC C.

In the following sections (Methods of preparing the technical offer and Methods of preparing the economic offer) indications are provided on how the technical and economic offer must be drawn up.

**The documentation must be drawn up in Italian or English, must be submitted in electronic format - non-editable, printable PDF and file.xls where required - by certified email, by the participant in the tender no later than 23/12/2024 at 10.00 AM.**

PEC address to which proposals must be sent within the aforementioned deadline:  
**consorzioeroarneis@pec.it**

## **It is required to send three separate transmissions via PEC (3 certified PEC messages)**

The following wording must be included in the subject of each certified e-mail:

- NOT OPEN - PEC A - ADMINISTRATIVE DOCUMENTATION - CALL FOR SELECTION OF A BODY RESPONSIBLE FOR IMPLEMENTING THE PROGRAMME FOR THE INFORMATION AND PROMOTION OF AGRICULTURAL PRODUCTS - THIRD COUNTRIES - USA CANADA

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- DO NOT OPEN PEC B – TECHNICAL OFFER – CALL FOR SELECTION OF A BODY RESPONSIBLE FOR IMPLEMENTING THE PROGRAMME FOR THE INFORMATION AND PROMOTION OF AGRICULTURAL PRODUCTS – THIRD COUNTRIES – USA CANADA
- DO NOT OPEN PEC C – ECONOMIC OFFER – CALL FOR SELECTION OF A BODY IN CHARGE OF THE IMPLEMENTATION OF THE INFORMATION AND PROMOTION PROGRAMME FOR AGRICULTURAL PRODUCTS – THIRD COUNTRIES – USA CANADA

In the case of sending by post or by hand delivery, the postal address to which proposals must be sent within the aforementioned deadline is as follows:

**Consortium for the Protection of Roero**  
**Piazza San Bernardino, 8**  
**12043 Canale - CN**  
**To the attention of Francesca Iraldi**

**In the case of shipping by post or hand delivery, delivery is at the expense and risk of the sender and must take place no later than the time and day of expiry** and on the outside of the envelope must be reported, in addition to the indication of the sender (individual or grouped subjects), the following wording:

**DO NOT OPEN - CALL FOR SELECTION BY OPEN COMPETITIVE PROCEDURE FOR THE SELECTION OF A BODY RESPONSIBLE FOR THE IMPLEMENTATION OF PART OF THE AGRICULTURAL PRODUCTS INFORMATION AND PROMOTION PROGRAMME – THIRD COUNTRIES: USA CANADA**

Inside, the envelope must contain three sealed envelopes identified as follows by the wording affixed to the outside:

- ENVELOPE A – ADMINISTRATIVE DOCUMENTATION – NOTICE OF SELECTION OF A BODY RESPONSIBLE FOR IMPLEMENTING THE PROGRAMME FOR THE INFORMATION AND PROMOTION OF AGRICULTURAL PRODUCTS – THIRD COUNTRIES – USA CANADA
- ENVELOPE B – TECHNICAL TENDER – NOTICE OF SELECTION OF A BODY RESPONSIBLE FOR IMPLEMENTING THE PROGRAMME FOR THE INFORMATION AND PROMOTION OF AGRICULTURAL PRODUCTS – THIRD COUNTRIES – USA CANADA
- ENVELOPE C – FINANCIAL OFFER – CALL FOR THE SELECTION OF A BODY RESPONSIBLE FOR IMPLEMENTING THE PROGRAMME FOR THE INFORMATION AND PROMOTION OF AGRICULTURAL PRODUCTS – THIRD COUNTRIES – USA CANADA

## **8.2 How to open bids**

The Selection Committee will meet in person or remotely through a videoconferencing platform and the relevant procedures will be communicated to the bidders.

Date 23/12/2024

Hour 15.00

Public session carried out in person or remotely via electronic videoconferencing platform for the opening of the PEC A/Envelope A and verification of administrative documentation.

The evaluation of the technical offers will take place in one or more reserved sessions remotely via electronic

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videoconferencing platform by the Selection Committee indicated in art. 7. The work of the Selection Committee will be adequately recorded with an indication of the reasons in support of the evaluations carried out.

Furthermore, as already indicated in art. 7, the economic offer will be evaluated in a private session, at the end of the evaluation of the technical offers carried out by the aforementioned Commission.

For any questions and/or clarifications for the execution of the offer, you can contact EXCLUSIVELY by e-mail to: [info@consorziodelroero.it](mailto:info@consorziodelroero.it) which will be followed by a reply exclusively in writing.

Any verbal requests or requests submitted in a manner other than that indicated will not be taken into consideration.

Communications by the Contracting Authority will be made by e-mail (PEC) to the certified e-mail address indicated by the competitor for operators based in Italy and by e-mail to the e-mail address indicated by the competitor for operators based abroad.

## 9 Tender Documents

### 9.1 Indications with respect to irregularities in the administrative documentation – ENVELOPE/PEC A

The deficiencies of any formal element of the application can be remedied through requests for additions and/or documentation by the Consortium. In particular, in the event of lack, incompleteness and any other essential irregularity of the documentation submitted, with the exception of those relating to the economic offer and the technical offer, the contracting authority shall assign the tenderer a deadline, not exceeding five days, for the necessary declarations to be made, supplemented or regularised, indicating their content and the persons who must make them. In the event of unnecessary expiry of the regularisation period, the tenderer shall be excluded from the tender. Essential irregularities that cannot be remedied are deficiencies in the documentation that do not allow the identification of the content or the person responsible for it.

### 9.2 Procedure for preparing the technical offer – ENVELOPE/PEC B

#### A. Technical report

##### **Overall strategy**

The operator must articulate his proposal by proposing the implementation strategies that he considers most effective in the pursuit of the project objectives using the following indications:

- a) demonstration of the ability of the working group 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) methods of achieving the specific objectives and results indicated in the project.

The operator must indicate for each activity envisaged by the project described above the relative methods of execution and achievement of the results. For the period of implementation of the programme, a series of minimum outputs required for each sector of activity is envisaged. Competitors have the right to submit a proposal at the time of the technical offer that provides for the realization of a greater number of outputs, provided that the consequent economic offer must fall within the limits determined by the auction base. Please note that the information reported for each individual activity/initiative will be compared with the relative costs reported in the Economic Offer - Envelope C, to assess its cost-effectiveness and adequacy.

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## **B) Presentation of graphic proposal, Key-visual and key message**

The economic operator participating in the Selection Tender must submit at least 2 graphic proposals of the concept that are consistent with the content of the promotional messages and with the plan of activities, suitable to ensure the achievement of the objectives set in the Program.

## **C) Presentation of the working group and CV of the staff employed**

The economic operator who participates in the Selection Tender must provide a presentation of the working group, with a detailed description of the professional figures employed and their skills, attaching the Curriculum Vitae.

## **D) Description of the methodological approach**

The economic operator participating in the Selection Tender must provide a description of the methods of execution of the actions, for the provision of the services and their consistency with the aims and objectives of the campaign, the description of the monitoring mechanisms and the presentation of any extra activities/services and assistance provided.

For each type of activity reported in the technical specifications, the specific interventions that are intended to be implemented to achieve the objectives of the program must be described. The activities and related interventions must be consistent with the strategy proposed for the target market and must be declined according to the following points:

- 1) methods of execution of the actions: description of the operating methods used for the provision of services and their consistency with the aims and objectives of the proposed communication campaign and with the Programme;
- 2) indication of expected KPIs;
- 3) description of the monitoring mechanisms and the correct execution of the activities;
- 4) presentation of any additional activities/services proposed and the methods of assistance provided to the Consortium.

## **9.3 Methods of preparing the economic offer - ENVELOPE/PEC C C**

### **ECONOMIC OFFER**

The PEC/ENVELOPE C must contain:

- Detailed financial plan for each activity and country to be provided in PDF and EXCEL format
- final summary table to be provided in PDF and EXCEL format

The Financial Plan will form the economic offer, on the basis of which the price of the proposal presented and its adequacy with respect to the services offered and market rates will be evaluated. The financial plan must indicate the costs related to the fee of the executing body, these must be detailed for each individual activity and presented in the form of man-days in relation to each individual initiative.

It is therefore required to prepare a table summarizing by year and by country, the total costs of the proposed activities with the relative cost of the agency's fee. Below is an example table, to be replicated for all WPs:



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DETAILED FINANCIAL PLAN			
COUNTRY _____			
e.g. WP 2. PUBLIC RELATIONS	YEAR 1	YEAR 2	YEAR 3
Example: Editorial plan			
Press kit			
....			
<b>WP2 sub-total activities by year</b>			
Agency fee (unit cost per day for a senior or junior consultant)			
Number of days planned			
<b>Total economic operator fee WP2</b>			
<b>WP2 annual total including fees</b>			

The remuneration of the Enforcement Body (**fee of the economic operator**) may be a maximum of 13%.

The economic operator must also fill in the following summary table given by way of example.

TARGET COUNTRY	USA			CANADA			Total	% fee
	Year 1	Year 2	Year 3	Year 1	Year 2	Year 3		
A) GENERAL SUB-TOTAL ASSETS FOR EACH INDIVIDUAL YEAR (SUB TOTAL ACTIVITY WP2 + SUB TOTAL ACTIVITY WP3 + SUBTOTAL ACTIVITY WP4 + SUBTOTAL ACTIVITY WP5 + SUBTOTAL ACTIVITY WP6)	€	€	€	€	€	€	Inserire sommatoria anno 1 + anno 2 + anno 3	
B) GENERAL SUB-TOTAL OF ECONOMIC OPERATOR FEES FOR EACH INDIVIDUAL YEAR (ECONOMIC OPERATOR FEE WP2 + ECONOMIC OPERATOR FEE WP3 + ECONOMIC OPERATOR FEE WP4 + ECONOMIC OPERATOR FEE WP5 + ECONOMIC OPERATOR FEE WP6)	€	€	€	€	€	€	Inserire sommatoria anno 1 + anno 2 + anno 3	Enter value B / A) in % (with value approximated to max 3 digits after the decimal point)
*A + B) TOTAL ECONOMIC OFFER TARGET COUNTRIES FOR EACH INDIVIDUAL YEAR	€	€	€	€	€	€	Inserire sommatoria anno 1 + anno 2 + anno 3	

\*NB: THE TOTAL OF THE ECONOMIC OFFER must be a maximum of the total amount of this selection procedure (€ 2,372,435.00 excluding VAT).

## 10 Obligations of the Enforcement Body

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In the event of approval of the Programme submitted under the Call for Simple Programmes – AGRIP-SIMPLE – 2024 – TC – AMERICAS Year 2024 of Reg. (EU) No. 1144/2014, Delegated Reg. (EU) No. 2015/1829, Implementing Reg. (EU) No. 2015/1831 and following the signing of the relevant contract, the Contractor/Enforcement Body will be responsible for the following elements:

- the performance of the services covered by the contract, in agreement and collaboration with the contracting body and in full and unconditional acceptance of the content of these specifications;
- adequate and timely information on the implementation of the programme activities and the achievement of the related deliverables and outputs;
- compliance with any indication contained in these specifications, even if not specifically referred to in this article, of rules and regulations in force both at national and EU level, as well as those that may be issued during the contractual period; (including regulations and municipal ordinances), with particular regard to those relating to health and safety and in any case pertaining to the subject matter of the contract and its execution;
- the Enforcement Body assumes full technical and financial responsibility for the actions referred to in Articles 3 and 5, including that relating to their compatibility with current European Union legislation and the applicable competition rules;
- the Implementing Body will have to supervise the administrative/financial monitoring of the programme, including the keeping of registers, supporting documents, the transmission of deliverables and the preparation of actions and payment requests. the collection and storage of supporting documents and materials;

The Contractor/Enforcement Body shall:

- for a period of three years after payment of the balance, keep records and keep supporting documents, in order to demonstrate the correct implementation of the action and the costs declared eligible;
- if audits, investigations, litigation or legal actions are ongoing under the Convention, keep records and supporting documents until the end of these procedures;
- make the above documentation available upon request or in the context of audits, 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 execution of the activities, including the data necessary for a correct assessment of the effectiveness of the programme, in accordance with the provisions of the regulatory framework of reference and all the information necessary for the preparation of periodic and final reports;
- keep the original documents.

## **11 Confidentiality and Non-Disclosure**

The successful bidder may not use, either directly or indirectly, for his own benefit or for that of third parties, the mandate entrusted and the information of which he will become aware in relation to it and this even 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 contractor undertakes to comply, in carrying out the activities covered by this procedure, with all the principles contained in the regulatory provisions in force, relating to the processing of personal data and in particular those contained in Legislative Decree no. 196/2003 and subsequent amendments and additions and in Regulation (EU) 2016/679 of the European Parliament and of the Council of 27 April 2016 containing the European Data Protection Regulation (hereinafter also "GDPR") and to ensure that the information contained

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in the personal, patrimonial, statistical, personal data and/or any other kind, of which he/she will become aware as a result of the services rendered, in any way acquired, are considered confidential and processed as such, while ensuring the transparency of the activities carried out.

The contractor of the service must formally undertake to give instructions to its staff so that all data and information are processed in compliance with the relevant legislation.

The successful bidder undertakes to use the above data and information exclusively for the purposes and within the scope of the activities envisaged by these specifications.

## **12 Conflicts of interest**

The Contracting Body will take appropriate measures to effectively prevent, detect and 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 provisions of Article 24 of Directive 2014/24/EU and Art. 42 of Legislative Decree 50/2016.

## **13 Defaults and Termination**

The contracting body has the right to control and verify the proper performance of the service with the help of appointees chosen at its discretion. In addition, the contracting authority has the right to contest the services rendered that do not comply in whole or in part with the requirements of the specifications or the offer proposed in the tender. Once the contract has been awarded, a service contract will be drawn up and signed, within which there will be clauses relating to non-compliance, disputes, suspensions and terminations.

## **14 Relations between the successful tenderer and the Administration of the Contracting Authority**

The contracted economic operator must identify a contact person responsible for the service, who will have the obligation to collaborate closely with the contact personnel of the contracting body and the Sole Project Manager (RUP) in the implementation of the service covered by the contract, as well as the operational resolution of problems relating to particular needs of the activities.

## **15 Controls**

The contracting body has the right to control and verify the proper performance of the service with the help of appointees chosen at its discretion. Since the contract is financed with European Union resources, checks may be ordered by the competent services of the European Union and/or national authorities.

## **16 Contract Fees**

The costs of stamp duty, stipulation, registration and any other ancillary expense inherent in the contract are borne for 50% by the winning enforcement body and for the remaining 50% by the contracting body.

## **17 Access to the documentation of the selection procedure**

Access to the documentation of the procedure is allowed in compliance with the provisions on the right of access to administrative documents in the following ways:

- It is **deferred**
  - a) in relation to the list of parties who have submitted bids, until the expiry of the deadline for the submission of bids;
  - b) in relation to the bids, up to the award;
  - c) in relation to the procedure for verifying the anomaly of the bid, up to the award.

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- It is **forbidden**
  - d) the information provided in the context of the tender or in justification of the same which constitutes, according to the reasoned and substantiated declaration of the tenderer, technical or commercial secrets;
  - e) the confidential reports of the works manager and the inspection body on the requests and reservations of the contractor.

In relation to the hypothesis referred to in paragraph letter d), access is allowed to the competitor for the purpose of defending his interests in court in relation to the contract award procedure.

## **18 Litigation**

For the resolution of all disputes that may arise in the performance of the service, which cannot be defined in a short term by the contracting parties, the competent court is that of Urbino, in the forms and ways provided for by law.

## **19 Ownership and use rights**

The rights of ownership and/or use and economic exploitation of the works, prepared or created by the Implementing Body by its employees and collaborators as part of or on the occasion of the execution of this service, will remain the exclusive property of the Contracting Authority, which may, therefore, order without any restriction the publication, dissemination, use, duplication of said intellectual works or material. These rights, pursuant to Law no. 633/41 "Protection of copyright and other rights granted to its exercise" as amended and supplemented by Law 248/00, must be considered assigned, acquired and licensed in a perpetual, unlimited and irrevocable manner. The Enforcement Body undertakes to deliver all products in an open and modifiable format and expressly undertakes to provide the Contracting Body with all the documentation and material necessary for the effective exploitation of the rights of exclusive ownership, as well as to sign all the documents necessary for the possible transcription of these rights in favour of the Contracting Authority in any public registers or lists. The Enforcement Body undertakes to comply with the current legislation on the collection and processing of personal data and the protection of databases.

## **20 Protection of personal data**

The contracting body, as data controller, complies with the provisions on the protection of personal data provided for in EU Regulation no. 2016/679 and in the relevant national legislation and fulfils the resulting obligations, adopting the appropriate technical and organisational measures to ensure a level of security appropriate to the risk.

As part of the execution of this call for tenders, the Contracting Authority processes the tenderer's data for the purposes and in the manner better specified in the information pursuant to Article 13 of EU Regulation no. 2016/679 available on request.

## **21 Sole project manager**

Sole project manager pursuant to art. 15 of Legislative Decree 36/2023 is Francesca Iraldi.

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