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INTERNATIONAL OLIVE COUNCIL

2011

**Survey about the promotion of
Olive Oil worldwide**

“The Who is Who of the promotion of olive oil worldwide”

Document No 1

TENDER SPECIFICATIONS

Ref. CO/25 -11PRO



TENDER SPECIFICATIONS

1. Purpose of the contract

1.1. – Background

The International Olive Council (IOC), based in Madrid, Spain, is an intergovernmental organization created in 1959 under the auspices of the United Nations. It is in charge of implementing the International Agreement on Olive Oil and Table Olives, 2005, the purpose of which is to promote trade, consumption and international cooperation in the fields of olive oil and table olives.

The promotion of olive products is one of the founding missions of the IOC written into Chapter I, article 1.3 of the International Agreement, which states that the general objectives of the Agreement with respect to the expansion of international trade and the promotion of olive products are:

- To promote any activities conducive to the harmonious, sustainable expansion of the world olive products economy by every means in the power of the International Olive Council in the fields of production, consumption and international trade, having regard to the ways in which they are interrelated
- To facilitate the study and application of measures for balancing production and consumption and the establishment of procedures for information and consultation in order to enhance the transparency of the market
- To implement measures designed to expand international trade in olive products and to adopt whatever measures are appropriate to enhance the consumption of olive oil and table olives
- To undertake activities fostering a better understanding of the nutritional, therapeutic and other properties of olive oil and table olives
- To maintain and amplify the role of the International Olive Council as a meeting point for all the operators in the sector and as a world documentation and information centre on the olive tree and its products



1.2. Purpose of the current survey

To become the first ever public reliable survey which will reveal who are the key actors - within the olive industry worldwide- involved in promotional activities performed to promote olive oil internationally and what are those activities. It should gather up-to-date information of :

- Marketing investments for olive oil (communication budgets)
- Countries selected for those promotional campaigns (reasons why)
- Main activities performed
- Type of media used
- Specific budget allocated to each market, activity and media

The results of this survey should allow the IOC and the olive oil Industry to get a clear and comprehensive picture of the promotional efforts and budgets invested by the Industry all over the world. That shared knowledge should help all the various members of the olive oil industry and allow them to :

- Define Opportunities to grab
- Define gaps to fill
- Define markets to explore
- Co-ordinate the efforts of the various players and try to avoid as much as possible double usage/billings

To summarize, the two main objectives pursued by the IOC are :

- (a) To improve the acute knowledge of the marketing and communication efforts performed by the various members of the olive oil industry
- (b) Improve the synergy –and therefore the impact- of the investments allocated by the various members of the olive oil industry.



2 – Description of work to be performed for this SURVEY

2.1 Scope and duration of the research

Delivery date: The *final report*, including an executive summary, should be delivered to the IOC by the **16 of May of 2012**

Note: The final report should be presented in two versions: the first one (for IOC exclusive usage), with all the information gathered with all the specific answers (names and budgets), the second one with the information regrouped into generic categories and no identifiable sources (this will be the public report to be shared).

A *Draft final report*, including an executive summary, should be delivered to the IOC by **the 16th of April 2012**.

2.2 Objectives:

Get a comprehensive and clear picture of the promotional efforts and budgets invested by the Olive Oil Industry all over the World.

It should identify :

For the following period : **2010 (calendar year)**;

- The marketing investments for olive oil [budgets spent -in euros (€) or US Dollar (\$) -] from various sources in selected markets (see Annexe 1)
- The sources should be regrouped into categories (international organisations –EU, IOC-; countries; within a country, administrations, trade associations, private companies; within private companies, manufacturers/exporters, importers/packers, retailers) (*)
- The various Promotional Campaigns, main activities performed
- Budgets per type of activity, per product
Types of activities per target and per communication approaches [Activities could be divided in three (3) Target Groups (Consumer, Opinion leaders & Trade)] and five (5) Communication approaches (Promotions, Advertising, Information (PR), Research, Trade Fair participations)].
- Type of media used and % of usages among the category (TV, type of magazines, fairs, internet, etc...)
- Seasonality of the expenditures (if any)

(*) Individual brands and companies should not be identified as such. Extreme confidentiality of their marketing investments / policies must be guaranteed. The information they will provide should be agglomerated (minimum of 3 companies) into a sector category.



2.3 Requirements and deliverables

The RESEARCH will entail conducting an Online Survey for all of the targeted markets / countries, (SEE LIST OF COUNTRIES IN ANNEXE 1)

The research will be only be realised for olive oil (in all its varieties and formats)

The study should mainly be performed as an Online Survey for all the Olive Industry members or key players such as:

- International & National Public Organizations
- Trade Associations
- Major Exporters & Importers (Brands)
- Major Retailers

The contractor will need to liaise closely with the IOC in the setting up of the questionnaires (which might need to be specific to each category of players) and in the mailing of those questionnaires.

The study should provide a complete & clear information report, as well as a detailed summary of the market research highlights.

Two final reports should be prepared :

- 1) The first one (for IOC exclusive use), with all the information gathered (identification of sources and budgets per actor), (*)
- 2) The second one with the information regrouped into generic categories and no identifiable sources (this will be the public report to be shared).

(*) Individual brands and companies should not be identified as such. Extreme confidentiality of their marketing investments / policies must be guaranteed. The information they will provide should be agglomerated (minimum of 3 companies) into a sector category.



The contractor will have to put in place a team of adequate size to perform the necessary tasks to provide the required services and will have to specify the number of persons in the team. The team will be required to have a good market research and on-line survey expertise and a good familiarity with FMCG concepts.

The contractor will be expected to set up a cost accounting system which will clearly show the costs of the tasks carried out in performance of the contract.

The contractor will have at its disposal the help of the IOC data base to facilitate contact with the key members of the olive oil industry in the various markets targeted by this survey. The contractor will also be required to complete or even set up for certain countries this data base (key players in the olive oil market). This data base should only and exclusively be used for the purpose of the present tender.

3. - Budget

The final, non-revisable maximum budget allocated for this study is:

- **Euros (€) 91.000,00 all taxes included**

This budget covers all expenditures related to the implementation of activity, such as administrative and travel costs, and the fees of the contractor.

All tenders are to be expressed in Euros. Any risk linked to exchange rates is covered by the selected contractor. In no case may the maximum accepted budgets in service contracts be revised upwards. The final amounts negotiated between the IOC and the contractor shall appear in the relevant programs.

The IOC shall not be responsible for any tax payments for which the contractor may be liable while carrying out activity. Taxes must be included in the budgets proposed to the IOC.

4. - Details of the contract

4.1. - General terms and conditions applicable to the call for tenders

4.1.1. - Joint tenders

Joint tenders or tenders from consortia will be accepted. The nature and organization of such tenders is at the discretion of the tendering party.

In any event, such tenders will be treated no differently from any other type of tender, each being assessed on its own merits in relation to the exclusion, selection and award criteria contained in these specifications.



4.1.2. - Subcontractors

Any intention to subcontract part of the contract must be clearly stated in the tender. In any case, the main contractor retains the sole responsibility for the contract.

Where appropriate, during performance of the contract the contractor may, if unable to provide a specific part of the work, call on the services of subcontractors, provided that, in each case, the IOC grants advance approval in writing.

Where subcontractors are to be used, the contractor must specify their qualifications and be able to demonstrate that they meet the same criteria as the contractor.

4.1.3. - Replies

All documents submitted by tendering parties become the property of the IOC and will be regarded as confidential. Expenditure on preparing and submitting tenders will not be reimbursed by the IOC.

4.1.4. - Contact point

The authorized contact point for questions relating to this call for tenders is:

International Olive Council

C/Príncipe de Vergara 154

28002 Madrid, Spain

Fax: +34 915 631 263

E-mail: iooc@internationaloliveoil.org

Tendering parties should put their questions in writing and send them to the contact.

4.1.5. Validity

Proposals remain valid for three months from the deadline for their presentation. Tenderers must explicitly indicate in their proposals that they accept such a condition.

5. - Evaluation of tenders and award of the contract

The documentation shall be presented in three sealed envelopes containing:

Envelope 1 - Administrative dossier:

1. Details of tenderer: Name of tenderer. Business name and address. Telephone and fax numbers. E-mail address. Contact person. Cover letter and completed annexes.
2. Proof of economic and financial capacity (see point 5.2.1.)
3. Proof of technical or professional capacity, (see point 5.2.2.)



Envelope 2: Financial offer (see point 3.)

Envelope 3: Technical dossier

The tender must give a full, clear and detailed description of all the services tendered, in addition to an implementation schedule (see point 2.)

Tenders will be evaluated on the basis of the information provided by bidders in their tenders under this call for tenders.

The evaluation will be carried out in the stages detailed below. Only tenders that meet the requirements of each stage will pass on to the next. The final stage will end with the award of the contract to the tendering party offering the best price/quality ratio.

5.1. Exclusion criteria

Tenderers shall be excluded from participation in a procurement procedure if:

- (a) they are bankrupt or being wound up, are having their affairs administered by the courts, have entered into an arrangement with creditors, have suspended business activities, are the subject of proceedings concerning those matters, or are in any analogous situation arising from a similar procedure provided for in national legislation or regulations;
- (b) they have been convicted of an offence concerning their professional conduct by a judgment which has the force of *res judicata*;
- (c) they have been guilty of grave professional misconduct proven by any means which the contracting authority can justify;
- (d) they have not fulfilled obligations relating to the payment of social security contributions or the payment of taxes in accordance with the legal provisions of the country in which they are established or with those of the country of the contracting authority or those of the country where the contract is to be performed;
- (e) they have been the subject of a judgment which has the force of *res judicata* for fraud, corruption, involvement in a criminal organization or any other illegal activity detrimental to the financial interests of the IOC;
- (f) following another procurement procedure, they have been declared to be in serious breach of contract for failure to comply with their contractual obligations.

Tenderers must certify that they are not in one of the situations listed above.



Contracts may not be awarded to tenderers who, during the procurement procedure:

- are subject to a conflict of interest;
- are guilty of misrepresentation in supplying the information required by the contracting authority as a condition of participation in the contract procedure or fail to supply this information.

Tenderers who have been guilty of making false declarations shall receive financial penalties representing 10% of the total value of the contract awarded. Contractors who have been found to have seriously failed to meet their contractual obligations shall receive financial penalties representing 10% of the total value of the contract in question. That rate shall be increased to 20% in the event of a repeat offence within five years of the first infringement.

The IOC shall accept, as satisfactory evidence that the tenderer is not in one of the situations described above in point (a), (b) or (e), production of a recent extract from the judicial record or, failing that, a recent equivalent document issued by a judicial or administrative authority in the country of origin or provenance showing that those requirements are satisfied.

The IOC shall accept, as satisfactory evidence that the tenderer is not in the situation described in point (d), a recent certificate issued by the competent authority of the State concerned. Where no such certificate is issued in the country concerned, it may be replaced by a sworn or, failing that, a solemn statement made by the interested party before a judicial or administrative authority, a notary or a qualified professional body in his/her country of origin or provenance.

Depending on the national legislation of the country in which the tenderer is established, the documents shall relate to legal persons and/or natural persons including the person with powers of representation, decision-making or control in relation to the tenderer.

5.2. Selection criteria

The capacity of tendering parties will be assessed in the light of the criteria below.

In the case of joint tenders (consortia), the selection criteria will be applied to each member of the consortium and to the consortium itself.

The tenderers have to prove that they are authorized to perform the contract under national law, as evidenced by inclusion in a trade or professional register, or a sworn declaration or certificate, membership of a specific organization, express authorization, or entry in the VAT register.



5.2.1. – Economic and financial capacity

Proof of economic and financial capacity shall be furnished by the following documents:

- a. appropriate statements from banks;
- b. the presentation of balance sheets or extracts from balance sheets for the last three years for which accounts have been closed, where publication of the balance sheet is required under the company law of the country in which the economic operator is established;
- c. a statement of overall turnover and turnover concerning the services covered by the contract during the last three financial years.

Tenderers may rely on the capacities of other entities, regardless of the legal nature of the links which it has with them. They must in that case prove to the contracting authority that they will have at their disposal the resources necessary for performance of the contract, for example by producing an undertaking on the part of those entities to place those resources at their disposal.

5.2.2. – Technical and professional capacity

Evidence of the technical and professional capacity of the tenderer shall be furnished on the basis of the following documents:

1. The educational, professional and linguistic qualifications of the service provider or contractor and/or those of the firm's managerial staff and, in particular, those of the person or persons responsible for providing the services or carrying out the work;
2. A list of:
 - the principal studies conducted in the past three years, stating the amounts, dates and recipients, public or private;
 - the work carried out in the last five years, stating the amounts, dates and places. The list of the most important work shall be accompanied by certificates of satisfactory execution, specifying whether they have been carried out in a professional manner and have been fully completed;
3. A description of the measures employed to ensure the quality of services, and a description of the firm's study and research facilities;
4. A statement of the average annual manpower and the number of managerial staff of the service provider or contractor in the last three years;



5. An indication of the proportion of the contract which the service provider may intend to subcontract.

Where the lists of studies referred to in point 2 are provided to contracting authorities, evidence of performance shall be in the form of certificates issued or countersigned by the competent authority.

6. - Award criteria

The tender offering the best value for money shall be the one with the best price–quality ratio.

The following evaluation criteria will be applied to assess the price-quality ratio of the services:

	POINTS
PRICE	35
QUALITY	65
Overall understanding of the objectives of the call, of the issues to be examined, and of the technical and organisational challenges involved.	5
Quality of the proposal (Methodology & Clarity) – Those should be paramount	60
Analitical Approach	
Planning	
Reporting	
Team Expertise (Market research and on-line survey Expertise, FMCG Knowledge, English fluency, Quality of the team, quality of the Group network)	
TOTAL	100

7. Performance guarantee

The IOC shall require the contractor to lodge a security in advance in order to ensure full performance of the contract.

The guarantee shall be denominated in Euros and shall be supplied by a bank or an authorized financial institution with the effect of making the bank or financial institution stand as irrevocable collateral security, or first-call guarantor of the contractor's obligations.



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The performance guarantee shall be lodged by the successful tenderer upon the signature of the contract and shall represent 10% of the total value of the contract. It shall expire, at the earliest, upon the finalization of the contract. In the event of poor contract performance, the guarantee in full shall be retained.

8. - Pre-financing guarantee

The successful tenderer may ask for a pre-financing payment of not more than 25% of the total amount of the contract. In such case the IOC shall require the contractor to lodge a pre-financing guarantee equal to the quantity pre-financed, in addition to the performance guarantee.



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ANNEX OF THE TENDER SPECIFICATIONS

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List of Countries

1	Albany
2	Argelia
3	Argentina
4	Australia
5	Brazil
6	Canada
7	Chile
8	China
9	Croatia
10	Cyprus (EU)
11	Egypt
12	France (EU)
13	Greece (EU)
14	India
15	Iran
16	Iraq
17	Israel

18	Italy (EU)
19	Japan
20	Jordan
21	Lebanon
22	Libya
23	Malta (EU)
24	Montenegro
25	Morocco
26	Portugal (EU)
27	Russia
28	Slovenia (EU)
29	Spain (EU)
30	Syria
31	Tunisia
32	Turkey
33	USA