



Invitation for bid - Merchandising Auditing Services for ITA Chicago Office

PREMISE

The Italian Trade Agency (ITA) announces that its Chicago office intends to initiate a procedure for the acquisition of the services in question, proceeding with the preliminary identification of economic operators - based in the US - that are in possession of the general requirements and professional competence, as per articles 80 and 83 of Legislative Decree 50/2016 of the Republic of Italy.

This notice describes the characteristics and requirements pertaining to the provision by an auditing service company within a framework agreement for ITA Chicago office. It is published on the website of this contracting authority for a period of 15 days starting from the day following the date of publication.

In accordance with the mission to promote Authentic Italian food and beverage products in the United States, ITA will be carrying out a number of in-store promotions during the upcoming months of 2019 and 2020 in partnership with several U.S. supermarket retailers (i.e. HEB, Walmart, Hy-Vee, and others to be identified). The subject of the promotions will be an assortment of food and wines which each retailer will identify at the beginning of the promotion and in most cases will not change during its course. Hence products promoted by one retailer will in most cases not be the same as those promoted by other ones.

ITA Chicago office requires that store visits be carried out in order to verify compliance with the covenants of the individual co-promotional agreements with the "Authentic Italian" in-store promotion of participating U.S. Supermarket Retail Chains.

1. CONTENT OF THE SOLICITED BIDS

The bid will include a detailed description of the way the bidder intends to provide the requested services, according to the following guidelines, and a quote, formatted as in attachment

The requested audit service will certify and provide feedback, in individual audit reports, on one or more of the following aspects of each promotion and/or other Italian-themed events.

- Presence and location of signage pertaining to the promotion (both outside and in-store)
- In-store location of promotional products in question
- Presence of all products included in a list provided by ITA Chicago
- Labeling of price tags or other shelf displays

- Observation of in-store cooking demonstrations and sampling tables or any other additional promotional activities in progress.

At least 17 photos (per audit) of the promotional area, signage, advertising material and natural state of products on shelves will be provided with each report.

One final report per retailer, summarizing the outcome of each store audit will also be provided.

The bidder might describe as well any tools or software applications provided to ITA for the retrieval and/or processing of the information and all other relevant aspects pertaining to its offer of service.

Please provide a sample report of an individual audit with your description of service(s) offered.

2. SPECIAL CONDITIONS

a. DURATION OF SERVICES

The duration of the agreement is 1 (one) year from the signing of the contract, after the verification of the information provided by the bidders.

b. ESTIMATED VOLUME OF THE CONTRACT AND PRESENTATION OF APPLICATIONS FOR PARTICIPATION

The expected number of audits for the 1 (one) year contract is 450 (four-hundred and fifty) audits/visits in the U.S. territory and, where possible, one batch of audits/visits in Mexico. There is no guarantee that such amounts will be reached although a significant level of activity is envisaged as of today.

c. CLARIFICATIONS

Clarifications regarding this request for bid should be asked for in writing with an e-mail message directed to chicago@ice.it. Clarifications will be posted on ITA's website, at the page <https://www.ice.it/it/mercati/stati-uniti/chicago/avvisi-indagini-di-mercato-0> or one of its sub-pages no later than 2 working days prior to the deadline for bid submission.

3. AWARDING OF THE CONTRACT AND CRITERIA

The applications for participation will be examined by the person in charge of the proceedings. The Responsible of the Procedure is Marco Saladini, Italian Trade Commissioner of the Chicago Office.



ITALIAN TRADE AGENCY

ICE - Italian Trade Commission

Trade Promotion Office of the Italian Embassy

Each proposal will be evaluated and if found compliant with this RFB, will be given a score from 1 to 100 representing the sum assigned for the following two criteria, within their respective maximum scores.

CRITERIA	MAXIMUM POINTS ASSIGNED
Price (quoted as in attachment B)	40
Quality, Functionality & Design of the requested services, including the sample report	60

There is no assurance that the lowest bid will prevail. ITA reserves the right to ask for additional information in the case one of the offers is substantially lower than the others.

A framework contract will be awarded on the basis of the criteria outlined above. The contract will consist of a document specifying contractual clauses in conjunction with addenda requested by applicable laws and will be signed by ITA Chicago and the awarded contractor. The awarded contractor will also be required to sign a Non-Disclosure Agreement (NDA) due to the confidential nature of information handled to complete the supermarket visits.

When an audit campaign will be needed, the ITA will make a formal request via email to a designated person of reference of the awarded service provider containing the following information and/or documents:

- Supermarket retailer name(s), campaign name(s) & number of audits;
- Store location list;
- Product list;
- Any special promotional material to be present in-store relating to promotion

It is of the expectation of the ITA that the audits will commence **within 10 business days upon** receipt of the information listed above so as to allow ample time for shopper/auditor recruitment and survey form development. The ITA will formalize this request via a letter for service request or a purchase order per

each campaign, by the ITA Chicago Trade Commissioner. This letter will make reference to the framework contract and will calculate the cost of the services to be carried out as follows: number of requested audits * audit price as quoted by the bidder (specified in Attachment B). This letter is to be countersigned and returned to our office via email within a timely manner. Payments will be made according to contractual provisions, in any case each order will be processed and paid separately and within the industry standard's timeframe.

The data provided by the applicants will be processed in accordance with Legislative Decree 196/2003 exclusively for the purposes connected with the completion of the procedure in question. The Office of reference for the selection procedure is the ITA Chicago Office (email: chicago@ice.it - t. 312.670.4360).

4. INSTRUCTIONS FOR BIDDING

Applications must be delivered - **under penalty of exclusion - in a sealed envelope to the ITA Office** -
401 N Michigan Avenue, Suite 1720 - Chicago IL 60611 - no later than **December 24th, 2019 at 5:00 PM** [REDACTED] (central standard time).

The envelopes must bear the following wording

DO NOT OPEN – This envelope contains "*Procedures for the awarding of public contracts - Merchandising Auditing Services*"

as well as an indication of the bidder's name (complete with address and telephone number) and the email address where it wants to receive any communication. Applications for participation received after the above deadline will not be considered. The delivery of the envelope remains at the sole risk of the sender as ITA does not accept any responsibility with regards to the actual delivery of the envelope or the integrity of its content.

Service providers interested in participating should include in the envelope the following documentation:

- IRS Form W-9
- the declaration in Attachment A, duly completed, dated and signed by the legal representative or its delegate with power of representation accompanied by a valid photocopy of the ID, in which the bidder certifies, under its own responsibility, what follows.
- General requirements (pursuant to Article 80 of Legislative Decree 50/2016)



ITALIAN TRADE AGENCY

ICE - Italian Trade Commission

Trade Promotion Office of the Italian Embassy

- Proof of requirements of professional competence in the sector of reference for the service requested (pursuant to Article 83, paragraph 1, letter a) of Legislative Decree No. 50/2016);
- Technical and professional skills (pursuant to Article 83, paragraph 1, letter c) of Legislative Decree 50/2016).

This notice is issued pursuant to art. 36, paragraph 2, lett. b) of Legislative Decree of the Republic of Italy n.50/2016 and subsequent amendments, in conjunction with guidelines n. 4, issued by the ANAC (the Italian National Anti-Corruption Authority) in implementation of Legislative Decree 18 April 2016, n. 50, containing "Procedures for the awarding of public contracts for amounts below the thresholds of Community relevance, market surveys and training and management of lists of economic operators" (Resolution No. 1097 of 26 October 2016), and as regards D.Lgs. 19 April 2017, n.56.

Signed by Marco Saladini, Italian Trade Commissioner - ITA Chicago Office.



ITALIAN TRADE AGENCY

ICE - Italian Trade Commission

Trade Promotion Office of the Italian Embassy

ATTACHMENT A - TO BE FILLED OUT AND RETURNED WITH BID

Certificate of good standing

FOR VENDORS' DATA BASE AND SELECTION PROCEDURES

I/We/The Company declare/declares under penalty of perjury under the Law of the United States and the Italian Law (Legislative Decree 50/2016 and its subsequent amendments) that:

Ø I/We/The Company have/has never been condemned in any court of law and I am not aware of any criminal federal or state investigation conducted against me

Ø I/We/The Company possess/possesses the license and/or permit and/or authorization in good standing and my license/permit/authorization has not been suspended (if applicable);

Ø I/We/The Company possess/possesses the skill and experience to provide the service/good to ITA, *as proven by the following titles, certifications, awards or other official documents* (wording in italics is optional, if reference is made to official documents please provide copies);

Ø I/We/The Company possess/possesses have/has obtained proper insurance coverage and named ITA as an additional insured (if applicable);

Ø The **N.A.I.C.S. (North American Industry Classification System) Code** of the company is: _____ For more information: <https://www.census.gov/eos/www/naics/index.html>

Ø I/We/The Company have/has not had a complaint filed against me by any law enforcement agency and have not engaged in any conduct that would give rise to sanctions and/or conviction under international, federal, state or local laws;

Ø I/We/The Company am/are/is in compliance with all governmental laws, statutes, and requirements applicable to the services/goods provided hereunder;

Ø I/We/The Company furthermore declare/declares that all the information provided and the accompanying documents and reports are true and correct to the best of my knowledge and belief.

Ø I/We/The Company *agree/agrees to comply with the requirements stated in Legislative Decree 50/2016 of the Republic of Italy.*



ITALIAN TRADE AGENCY

ICE - Italian Trade Commission

Trade Promotion Office of the Italian Embassy

Ø By signing this statement, I/We/The Company hereby *agree/agrees* to authorize a background check and I agree to sign each and every document necessary to enable ITA to conduct a verification and background check. I expressly release ITA from any claim or cause of action arising out of the ITA's verification of such information.

Print name and title: _____

Company: _____

Phone number: _____

Email address: _____

Authorized Signature _____

Date _____



ITALIAN TRADE AGENCY

ICE - Italian Trade Commission

Trade Promotion Office of the Italian Embassy

ATTACHMENT B - TO BE FILLED OUT AND RETURNED WITH BID

Merchandising Auditing Services for ITA Chicago

PRICE QUOTATION

The undersigned company engages itself to perform the services required by ITA Chicago office for Merchandising Auditing Services for the amount specified as follows.

Please provide a unit price, i.e. a price per each audit, for each of the following ranges of number of products to be checked during the audit: 1-50, 51-100, 101-150, and 151-200. Score will be based on the average of these four prices.

<u>Number of SKUs/Products to be checked in each audit</u>	<u>Unit Price i.e. price per each audit (\$)</u>
1-50	
51-100	
101-150	
151 - 200	

() Please check here if you have the capability to complete audits in Mexico.

The undersigned firm engages itself to perform the works in compliance with the clauses, conditions and specifications provided in this letter of invitation.

_____ of _____

(Print your name)

(Company name)

_____ (date)

ITA – Trade Promotion Section of the Italian Embassy
 401 N Michigan Avenue - Suite 1720
 Chicago (IL) - USA
 T +1 312 6704360 / F +1 312 6705147
 E-mail: chicago@ice.it
www.ice.it