Reference No.: GRETA-SC-167/2023

Terms of Reference

**Merchandising and promotion service for organic brands/products**

Project/Programme Title: **GRETA | Green Economy: Sustainable Mountain Tourism and Organic Agriculture**

Country: **Georgia**

ADA Contract Number: **ADA ID No. 6542-00/2018**

EU Identification Number: **EU ID No. ENI/2018/401-348**

Implementer: **Austrian Development Agency (ADA)**

Outcome 2: **Employment and in-come in both sectors is increased due to new and better products and services and through better market linkages, locally, nationally and internationally.**

Output: **2.3 New market linkages have been created through marketing activities**

Budget Line: **6.5.3. Supporting branding, packaging and marketing of the products (direct support to the producers and grants)**

Name of Partner/Donors Organizations: **European Union Delegation, Swedish Embassy, Austrian Development Cooperation**

# Introduction and background:

Agriculture and tourism constitute two essential sectors of income in the rural high mountain areas of Georgia.

In 2021, despite the pandemic, the **Georgian agri-food sector** showed significant positive results. According to preliminary data, the total production indicator of agribusiness products (production of primary agricultural products and products obtained through processing) amounted to about 4.2 billion euros (32.5% higher than the 2018 figure); the added value indicator was 1.2 billion euros (22.1% higher than the 2018 figure); the average monthly income of rural households calculated per one household was 320 euros (11.6% higher than in 2018).

In the same period, the persistence of the pandemic has continued affecting the **tourism sector** dramatically: the foreign exchange income from international travel (480 million EURO) was 83.4% lower than in 2019; the total value added in the tourism sector fell by 29.8%; the gross value from tourism industries as a proportion of GDP decreased from 8.4% to 5.9%. The mountainous protected areas showed a decline of number of visitors of 80% compared to the previous year and the income from tourism services registered a fall of 90.4% since 2019.

The **overall objective** of GRETA | Green Economy: Sustainable Mountain Tourism and Organic Agriculture is to facilitate an improvement of the business environment and the creation of new income opportunities in sustainable mountain tourism and organic agriculture to reduce poverty and exclusion in the selected mountain areas of Georgia.

The **expected outcomes** are:

1. The legal and policy framework for sustainable mountain tourism and organic agriculture is enabling sustainable and inclusive development;
2. Employment and income in both sectors are increased due to new and better products and services and through better market linkages, locally, nationally and internationally;
3. Access to capacity development measures for people and institutions active in the fields of sustainable mountain tourism and organic agriculture is improved and a system of knowledge management is in place enabling joint learning among public, private and civil society actors.

The **project targeted** area consists of eight municipalities in the regions of Upper Imereti (municipalities of Sachkhere, Tkibuli, Chiatura), in Racha-Lechkhumi-Lower Svaneti (municipalities of Ambrolauri, Oni, Tsageri, Lentekhi) and in Upper Svaneti (municipality of Mestia).

**Direct beneficiaries** of GRETA are going to be at least 400 small-scale business enterprises and producers in mountain tourism, 300 accommodation service providers, 300 other tourism service suppliers like tour operators (climbing-, hiking-, bicycle-, walking-, horseback-, historical- and culinary tours), tourism information centres associations and DMOs (Destination Management Organizations), 230 farmers involved in organic agriculture certification, 2 certification bodies, 76 local villagers and inspectors specialized in selected local value chains.

**Indirect beneficiaries** on the central level are six Ministries and public institutions (Ministry of Economy and Sustainable Development, Ministry of Environmental Protection and Agriculture, Ministry of Regional Development and Infrastructure, Enterprise Georgia, Georgian National Tourism Administration), some 70 extension service staff and other MEPA-representatives at municipality and central level, 6 associations, retailers and online food stores, agricultural colleges and training institutions, several thousand tourists, and thousands of consumers of organic products.

GRETA project is implemented between **2019 and 2023**.

The **project budget** totals € 6.8 Million Euros and consists of contributions of the EU (€ 3 mill.), Sweden (€ 2.8 mill.) and the Austrian Development Cooperation (€1.0 mill.).

The **governance** of the GRETA project is guaranteed by a Programme Steering Committee (SC) and an Advisory Committee (AC), where the three donors plus representatives of various government agencies are represented.

Further information about the GRETA project: [www.gretaproject.ge](http://www.gretaproject.ge)

# Objective(s) of the Assignment:

The purpose of the assignment is for a highly professional marketing/PR and merchandising production company to conduct marketing needs assessment, produce merchandising materials and promote organic brands/products through retail and / or on trade markets.

# Tasks to be conducted:

The selected company shall be contracted/funded to perform the following tasks:

1. Conduct marketing/PR needs focusing on retail and/or on trade markets for **3 organic certified brands/products (Tea and Wine value chains)**
	1. Revising already conducted research and strategy papers such as market analysis and digital strategy.
	2. Conducting deep marketing/PR needs for each producer holding organic certificate.
	3. Elaborating high-quality document with analysis, key findings, recommendations and further steps.
2. Design and produce Merchandising equipment per each brand/product (**Totally for 3 brands/products**).
	1. Create design (Graphical as well as technical) for merchandising materials such as:
		1. **Tea brand/product (1 brand):**
			1. Branded tasting/promotional desk – foldable and easily transportable (Table, back drop banner, branded Tea tasting equipment set for tasting: Tea pot with warm keeping equipment, Boiling equipment, teacup set, 200 branded paper teacups) / integrating donor’s visibility
			2. Gift pack with tea samples for Tea products
			3. Promotional attribute: branded teacup
			4. POSM (Point of Sales Materials) set (Standard: Shelf stoker, price tag, description tag)
			5. Branded professional apron.
			6. Foldable booklet holder
			7. Brand catalogue
			8. Business cards
		2. **Wine brand/product #1(1 brand):**
			1. Branded tasting/promotional desk – foldable and easily transportable (Table, back drop banner, branded wine tasting equipment set for tasting: Wine bottle accessorize, 200 branded high quality plastic wineglass) / integrating donor’s visibility
			2. Gift pack package for wine products
			3. Promotional attribute: branded wine glass
			4. POSM set (Point of Sales Materials) Standard: Shelf stoker, price tag, description tag)
			5. Branded professional apron
			6. Fordable booklet holder
			7. Brand catalogue
			8. Business cards
		3. **Wine brand/product #2 (1 brand):**
			1. Branded tasting/promotional desk – foldable and easily transportable (Table, back drop banner, branded wine tasting equipment set for tasting: Wine bottle accessorize, 200 branded high quality plastic wineglass) / integrating donor’s visibility
			2. Gift pack package for wine products
			3. Promotional attribute: branded wine glass
			4. POSM set (Point of Sales Materials) Standard: Shelf stoker, price tag, description tag)
			5. Branded professional apron
			6. Fordable booklet holder
			7. Brand catalogue
			8. Business cards
	2. Production of above-mentioned merchandising items.
		1. **Tea brand/product** **(1 brand):**
			1. Branded tasting/promotional desk – foldable and easily transportable (Table, back drop banner, branded Tea tasting equipment set for tasting: Tea pot with warm keeping equipment, Boiling equipment, teacup set, 200 branded paper teacups) / 1 set per brand.
			2. Gift pack with tea samples for Tea products / 150 pack per brand.
			3. Promotional attribute: branded teacup / 150 units per brand.
			4. POSM (Point of Sales Materials) set (Standard: Shelf stoker, price tag, description tag) / 100 set per brand.
			5. Branded professional apron. / 5 units per brand.
			6. Foldable booklet holder / 1 construction per brand.
			7. Brand catalogue / 100 per brand.
			8. Business cards / 200 per brand.
		2. **Wine brand/product #1 (1 brand):**
			1. Branded tasting/promotional desk – foldable and easily transportable (Table, back drop banner, branded wine tasting equipment set for tasting: Wine bottle accessorize, 200 branded high quality plastic wineglass) / 1 set per brand.
			2. Gift pack package for wine products / 150 pack per brand.
			3. Promotional attribute: branded wine glass / 150 units per brand.
			4. POSM set (Point of Sales Materials) Standard: Shelf stoker, price tag, description tag)
			5. Branded professional apron / 5 units per brand.
			6. Fordable booklet holder / 1 construction per brand.
			7. Brand catalogue / 100 per brand.
			8. Business cards / 200 per brand.
		3. **Wine brand/product #2 (1 brand):**
			1. Branded tasting/promotional desk – foldable and easily transportable (Table, back drop banner, branded wine tasting equipment set for tasting: Wine bottle accessorize, 200 branded high quality plastic wineglass) / 1 set per brand.
			2. Gift pack package for wine products / 150 pack per brand.
			3. Promotional attribute: branded wine glass / 150 units per brand.
			4. POSM set (Point of Sales Materials) Standard: Shelf stoker, price tag, description tag)
			5. Branded professional apron / 5 units per brand.
			6. Fordable booklet holder / 1 construction per brand.
			7. Brand catalogue / 100 per brand.
			8. Business cards / 200 per brand.
3. **Support 3 brands (1 tea brand plus 2 wine brands) in negotiation with retailer/on trade**
	1. Conduct preliminary introduction per each brand (In total 3 brands) with retailers and/or on trade points
	2. Set up a most prosperous meeting per each brand (In total 3 brands) engaging the beneficiary SMEs
	3. Draft the deals and support beneficiary SME for negotiation per each brand (In total 3 brands)
4. **Promote 3 organic certified brands/products** with partner retailer and/or on trade points
	1. Cover the costs for 1-month tasting space renting at retail and/or on trade points per brand
	2. Tasting and promo personnel for 1 month retail and/or on trade points promotional campaign per brand
	3. 1 month digital promotional campaign / integrating donor’s visibility per brand

In undertaking these activities, the consultants will adopt a fully consultative and participative approach, particularly when working with agreed beneficiaries. The firm will work closely with GRETA project staff and GRETA project Marketing Expert Company as appropriate.

To achieve the outputs and results, the assignment should involve using a full range of methodologies. The consultant applicants should be able and prepared to use all the methodologies open to them to achieve the objectives of the assignment.

Consultants should be prepared to travel independently with support from GRETA field offices in arranging meetings and consultations.

# Deliverables:

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **#** | **Deliverables** | **Quantity** | **Unit cost in EUR (net of VAT)** | **Total cost** **in EUR****(net of VAT)** |
| 1 | **Inception report** | A brief high-quality document describing work approach as well as process M&E system. | **1 report** |  |  |
| 2 | **Marketing/PR needs**  | Three (3) comprehensive and high-quality documents - a detailed analysis and assessment of marketing and PR needs focusing on retail market for **3 organic certified brands/products (1 brand for Tea value chain and 2 brands for Wine value chain)** | **3 documents** |  |  |
| 3 | **Design (One document per brand/product: in total 3 design documents with working files)** | 1. **Tea brand/product (1 brand):**
	* + 1. Branded tasting/promotional desk – foldable and easily transportable (Table, back drop banner, branded Tea tasting equipment set for tasting: Tea pot with warm keeping equipment, Boiling equipment, teacup set, 200 branded paper teacups) / integrating donor’s visibility
			2. Gift pack with tea samples for Tea products
			3. Promotional attribute: branded teacup
			4. POSM (Point of Sales Materials) set (Standard: Shelf stoker, price tag, description tag)
			5. Branded professional apron.
			6. Foldable booklet holder
			7. Brand catalogue
			8. Business cards
 | **1 package** |  |  |
| 4 | **Design (One document per brand/product: in total 3 design documents with working files)** | 1. **Wine brand/product (1 brand):**
2. Branded tasting/promotional desk – foldable and easily transportable (Table, back drop banner, branded wine tasting equipment set for tasting: Wine bottle accessorize, 200 branded high quality plastic wineglass) / integrating donor’s visibility
3. Gift pack package for wine products
4. Promotional attribute: branded wine glass
5. POSM set (Point of Sales Materials) Standard: Shelf stoker, price tag, description tag)
6. Branded professional apron
7. Fordable booklet holder
8. Brand catalogue
9. Business cards
 | **1 package** |  |  |
| 5 | **Design (One document per brand/product: in total 3 design documents with working files)** | 1. **Wine brand/product (1 brand):**
2. Branded tasting/promotional desk – foldable and easily transportable (Table, back drop banner, branded wine tasting equipment set for tasting: Wine bottle accessorize, 200 branded high quality plastic wineglass) / integrating donor’s visibility
3. Gift pack package for wine products
4. Promotional attribute: branded wine glass
5. POSM set (Point of Sales Materials) Standard: Shelf stoker, price tag, description tag)
6. Branded professional apron
7. Fordable booklet holder
8. Brand catalogue
9. Business cards
 | **1 package** |  |  |
| 6 | **Production (Photo report for following produced merchandising items)** | 1. **Tea brand/product (1 brand):**
2. Branded tasting/promotional desk – foldable and easily transportable (Table, back drop banner, branded Tea tasting equipment set for tasting: Tea pot with warm keeping equipment, Boiling equipment, teacup set, 200 branded paper teacups) / 1 set per brand.
3. Gift pack with tea samples for Tea products / 150 pack per brand.
4. Promotional attribute: branded teacup / 150 units per brand.
5. POSM (Point of Sales Materials) set (Standard: Shelf stoker, price tag, description tag) / 100 set per brand.
6. Branded professional apron. / 5 units per brand.
7. Foldable booklet holder / 1 construction per brand.
8. Brand catalogue / 100 per brand.
9. Business cards / 200 per brand.
 | **1 package** |  |  |
| 7 | **Production (Photo report for following produced merchandising items)** | 1. **Wine brand/product (1 brand):**
2. Branded tasting/promotional desk – foldable and easily transportable (Table, back drop banner, branded wine tasting equipment set for tasting: Wine bottle accessorize, 200 branded high quality plastic wineglass) / 1 set per brand.
3. Gift pack package for wine products / 150 pack per brand.
4. Promotional attribute: branded wine glass / 150 units per brand.
5. POSM set (Point of Sales Materials) Standard: Shelf stoker, price tag, description tag)
6. Branded professional apron / 5 units per brand.
7. Fordable booklet holder / 1 construction per brand.
8. Brand catalogue / 100 per brand.
9. Business cards / 200 per brand.
 | **1 package** |  |  |
| 8 | **Production (Photo report for following produced merchandising items)** | 1. **Wine brand/product (1 brand):**
2. Branded tasting/promotional desk – foldable and easily transportable (Table, back drop banner, branded wine tasting equipment set for tasting: Wine bottle accessorize, 200 branded high quality plastic wineglass) / 1 set per brand.
3. Gift pack package for wine products / 150 pack per brand.
4. Promotional attribute: branded wine glass / 150 units per brand.
5. POSM set (Point of Sales Materials) Standard: Shelf stoker, price tag, description tag)
6. Branded professional apron / 5 units per brand.
7. Fordable booklet holder / 1 construction per brand.
8. Brand catalogue / 100 per brand.
9. Business cards / 200 per brand.
 | **1 package** |  |  |
| 9 | **Support SMEs in negotiation with retailer and / or on trade points** | Tree (3) documents describing draft deals/proposal and report for the deal process **for the 3 organic certified brands/products (1 brand for Tea value chain and 2 brands for Wine value chain)** | **3 documents**  |  |  |
| 10 | **Promotion**  | High quality report for promotion campaign **for the 3 organic certified brands/products (1 brand for Tea value chain and 2 brands for Wine value chain)** | **3 promotion campaigns** |  |  |
| 11 | **Monthly progress report**  | Brief document(s) describing the working progress including project coordination, M&E and all the relevant administrative recordings. | **1 report per month** |  |  |
| 12 | **Final report combining all the deliverables** | A compilation of all documents, reports, deliverables, assumptions, and concerns. | **1 final report** |  |  |

**NOTE#1: the Service Contract is on deliverable basis.**

**NOTE****#2: Budget includes administration fees, logistic fees (transportation, per diem, accommodation, contingency costs, etc.) and translation expenses. No other budget lines/other costs can be added. All the costs must be included in the respective budget lines. No expense verification documents are required.**

**NOTE#3: ADA/GRETA may change the quantities of the budget line at its own discretion using the same agreed rates indicated in the budget. New changes can be made only within contracted maximum amount.**

# Timeline and Milestones

The project must be completed by 15th September 2023.

# Size and Qualifications of the Assessment Team

Collectively, the team will be expected to include a balance experts, context, content, and process to successfully complete this assignment.

**Minimum Required Personnel**

|  |  |
| --- | --- |
| REQUIRED PERSONNEL | Minimum Years of Experience in Handling either National or international wide Accounts |
| 1. Project team leader
 | 10 years |
| 1. Project coordinator
 | 5 years |
| 1. Designer
 | 5 years |
| 1. Production team
 | 5 years |
| 1. Trade promotion expert
 | 5 years |
| 1. Administrative assistant
 | 3 years |

*Note: Bidders is free to recommend additional personnel that is deemed to be fit for the Team*

# Qualification and Eligibility

* The firm/ to be selected must be an organization or institution that has at least 5 years’ experience or the team should have at least 5 years’ experience in marketing, production and trade promotion.
* Given the complexity of tasks and the ambitious results, it is expected that the Contractor should engage qualified expert as team leader to ensure the high quality of the project.
* The firm must be capable of advising the client on how to achieve the set goals in efficient manner.
* The firm may have a tie-up or joint venture arrangement with other local or international agencies to execute the project. It may also have a joint venture with a global company.

# Evaluation and Selection:

The overall proposal will consist of two separate parts - the **technical proposal** and **financial proposal**. Proposals should be prepared as per format below and they will be evaluated based on the scoring criteria mentioned here below. Bidders are also encouraged to avoid overly generic proposal language and instead provide a contextually appropriate, descriptive, and specific plan for managing the activities and reaching the expected deliverables.

**Technical Bid/Proposal Criteria and Rating**

|  |  |  |
| --- | --- | --- |
| CRITERIA  | DESCRIPTION | RATING |
| Capability of the bidder | Minimum Required Personnel | **30%** |
| Team composition / Pool of Experts  |
| Quality of Personnel to be assigned to the project  | Market Research and analysis | **30%** |
| Eexpertise in project management  |
| Eexpertise in marketing |
| Eexpertise in trade promotion |
| Project management Plan  | Team structure/roles and responsibilities  | **20%** |
| Timeframe  |
| Financial Offer  | The financial proposal should indicate professional fees, including the level of people and number of days and out-of-pocket costs like travel, per diems, etc. | **20 %** |
| TOTAL | **100%** |

Note technical proposal should not exceed 20 Pages.

# List of the required documents

* The **TECHNICAL PROPOSAL** should include:
	+ Company profile
	+ Proposed Methodology/Framework;
	+ Detailed project implementation;
	+ CV(s) of the Personnel(s);
	+ At least two signed references that are independent from each other;
* The **Financial Proposal** in EURO Gross excluding VAT:
	+ Budget template is attached;
	+ The financial proposal must be compliant with the budget template attached to the ToR. The bidders are requested to provide the financial proposal filling in the budget template attached to the ToR ONLY.

**Financial proposal not compliant with the budget template will be rejected.**

* + Organization Identification Number.

**Applicants submitting proposal via Cloud Base sources (e.g Wetransfer) will not be considered eligible for evaluation process.**

\*You can check the VAT exemption status effective within Georgia at RS.GE (ID: 205305560)

# Deadlines and Submission:

**Questions for clarification** can be addressed to **mariam.tsereteli@ada.gv.at** before **26.05.2023 09:00**. The response to submitted questions will be supplied no later than **27.05.2023 17:00**.

Non-binding offer free of charge in the English language should be submitted via Email to **mariam.tsereteli@ada.gv.at** before **30.05.2023 16:00** in the form of two separate, signed, documents in pdf format. One document clearly marked TECHNICAL PROPOSAL and one document clearly marked FINANCIAL proposal. Please indicate “**CFP – Merchandising and promotion service for organic brands/products** ” in the subject line.

The GRETA project/ADA, its donors and implementing company reserve the right to reject all proposals and cancel, reschedule and/or stop the call for Expression of Interest and/or Tender at any time.

# Processing of Personal Data

During initiation and performance of contracts, ADA may process personal data of natural persons that are collected by ADA or transferred or disclosed to ADA by prospective contractors or third parties under their instruction, e.g., personal data of employees, legal representatives, agents or other partners of the prospective contractors or such third parties.

By submitting information to ADA, you, as a prospective contractor, acknowledge:

* to have taken note of ADA’s Privacy Notice <https://www.entwicklung.at/en/media-centre/privacy-notice> (’ADA Privacy Notice’);
* to ensure that each direct or indirect transfer or disclosure of personal data to ADA during the initiation or performance of a contract is lawful pursuant to applicable data protection law;
* to ensure that all persons, whose personal data are transferred or disclosed to ADA, were promptly and demonstrably provided the ADA Privacy Notice; and
* that if a contract is concluded and in accordance with its terms, ADA publishes, in particular on the ADA website, information about the contract and the contracting parties.

# Other conditions:

The technical teams of the contracted firm will be required to use their own laptops and submit all deliverables in digital format. The offeror is expected to plan for the team’s workspace, conference facilities, telecommunications, printing, and any other needs necessary for completing the activities.

## Confidentiality:

The materials produced during the period of this consultancy will be treated as strictly confidential, and the rights of distribution and/or publication will reside with GRETA/ADA. Use or re-publication of any material by the contractor will not in any way be permitted.

## Nature of Penalty Clause to be stipulated in the contract:

GRETA/ADA reserves the right not to pay the Contractor or withhold part of the payable amount if one or more requirements established for this assignment are not met or the deadline set for the accomplishment of the tasks is missed.

## Contract:

The selected company will be awarded a maximum 9 months -long contract starting from the day of signature.

## Payment Schedule:

Payments will be based on deliverables and will be made in local currency (GEL) converted from EURO in the date of payment and within 10 days upon delivery, based on GRETA’s satisfactory review of services specified in terms of Reference and the formal approval. Nature of Penalty Clause to be stipulated in the contract:

GRETA/ADA reserves the right not to withhold all or a portion of payment if performance is unsatisfactory, if work/outputs are incomplete, or if not delivered for failure to meet deadlines.

## Working language:

GRETA/ADA project working languages are Georgian and English, and communication, meetings, documentation, deliverables, etc., have to be bilingual.

## Support provided by GRETA:

GRETA will regularly communicate with the contractors and provide feedback and guidance and necessary support to achieve the objectives of the work, as well as remain aware of any upcoming issues related to the performance and quality of work. GRETA will provide the contractors with:

* Basic information on the projects (reports, earlier developed human stories, GRETA -branded pictures);
* Branding and other GRETA guidelines on multi-media materials.
* Suggestions on the most suitable project sites, stories, and relevant contacts.

## Copyrights & utilization rights:

The copyright of all materials produced (raw and edited) taken during the assignment will belong to GRETA/ADA.

## Code of conduct:

Code of conduct during the term of consultancy: the GRETA/ADA Code of Conduct must be signed and thoroughly followed by the consultant.