



**#SPAIN FOOD NATION  
FOODS AND WINES FROM SPAIN  
ADVISORY COUNCIL AND SUMMIT 2024**

**BRIEFING/CONTRACTUAL CONDITIONS  
CALL FOR BIDS  
FROM STRATEGY CONSULTING FIRMS  
APRIL 2024**

**ICEX ESPAÑA EXPORTACIÓN E INVERSIONES, E. P. E.  
SPANISH TRADE COMMISSION OF SPAIN IN NEW YORK**

## **CONTENTS**

<b>1. SCOPE OF REQUEST .....</b>	<b>4</b>
<b>2. PURPOSE OF THE CONTRACT .....</b>	<b>9</b>
<b>3. CONTRACT, APPLICABLE LEGISLATION AND JURISDICTION.....</b>	<b>10</b>
<b>4. CONTRACT TERM .....</b>	<b>10</b>
<b>5. CONTRACT BUDGET.....</b>	<b>10</b>
<b>6. PAYMENT AND INVOICING .....</b>	<b>10</b>
<b>7. CONSULTANT PROFILE AND REQUIREMENTS.....</b>	<b>11</b>
<b>8. CONTENT OF PROPOSALS.....</b>	<b>14</b>
<b>9. PRESENTATION OF PROPOSALS .....</b>	<b>16</b>
<b>10. EVALUATION CRITERIA.....</b>	<b>18</b>
<b>11. HIRING AWARD COMMITTEE .....</b>	<b>21</b>
<b>12. OBLIGATIONS .....</b>	<b>21</b>
<b>13. CANCELLATIONS AND TERMINATION.....</b>	<b>23</b>
<b>14. MODIFICATIONS OF THE CONTRACT .....</b>	<b>23</b>
<b>15. APPLICABLE LEGISLATION .....</b>	<b>24</b>
<b>16. JURISDICTION .....</b>	<b>24</b>
<b>17. EUROPEAN FUNDING .....</b>	<b>24</b>
<b>18. ORGANIZATIONS .....</b>	<b>24</b>
<b>APPENDIX I. Document 3. Financial Proposal.....</b>	<b>26</b>
<b>APPENDIX II. Document 3. Project Human Resources .....</b>	<b>27</b>
<b>Annex I. Discussion Topic for the 2024 Food and Gastronomy Advisory Council</b>	<b>28</b>
<b>Annex II. Discussion Topic for the 2024 Wines Advisory Council .....</b>	<b>30</b>

**ICEX Spain Trade and Investment, E.P.E.** (hereinafter, **ICEX**), represented by the Trade Commission of Spain in New York, (hereinafter, **TCSNY**), invites qualified food and wine consulting firms (hereinafter, the Consultant),

We kindly request your submission of a proposal for the organization and operation of the following:

1. The 2024 Foods & Wines from Spain Advisory Councils (FWSAC).
2. The 2024 Spain Food Nation Summit, scheduled for October 1 in New York

The deadline for proposals to be received is **May 21, 2024, 6pm ET** (New York time).

ICEX is a public corporation that is part of Spain’s Ministry of Economy, Commerce and Business through the State Secretariat for Trade, established and governed by Royal Decree-Act 4/2011, dated 8 April, and with its headquarters in Madrid, Spain. ICEX’s mission is to promote exports by Spanish companies and support their international development to improve their competitiveness.

#Spain Food Nation is a joint initiative by ICEX and the Ministry of Agriculture, Fisheries and Foodstuffs of Spain to educate and build awareness around the diversity and quality of Spanish food products, alcoholic drinks, and gastronomy in major export markets. The activities organised by the Consultant will be implemented under this brand identity.

1.-	Contracting Authority:	ICEX España Exportación e Inversiones, E.P.E. (ICEX Spain Trade and Investment) VAT No. Q2891001F
2.-	Scope of the contract:	To select a Strategy Consultant with extensive experience in the alcoholic drinks and food industries in the United States, who will be tasked with defining, preparing, organising, implementing the Foods and Wines from Spain Advisory Councils, the organization of #SpainFoodNation Summit, and preparing the Conclusions Reports.
3.-	Submission of tenders:	The 3 separate documents that represent the proposal need to be sent via email EXCLUSIVELY to either <a href="mailto:tenders@icex.es">tenders@icex.es</a> by 6 pm ET (New York time) on <b>Tuesday, May 21, 2024</b>  Attachments should not exceed a total of 4MB in size. If they are larger, a tried and tested file transfer service should be used.

## 1. SCOPE OF REQUEST

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### 1.1. Background on ICEX, the Spanish agency for the promotion of trade and investment

ICEX ([www.icex.es](http://www.icex.es)) is a Spanish public body established in 1982 whose main purpose is to promote the international development of the Spanish economy. ICEX is attached to the Ministry of Economy, Commerce and Business (MINECO) ([www.mineco.gob.es](http://www.mineco.gob.es)) and is responsible for developing and implementing the Ministry's international economic policy.

To achieve its mission, ICEX has an extensive network of professionals who specialise in this field. These professionals work at ICEX's headquarters in Madrid, at the 30+ Territorial and Provincial Trade Offices based in different Spanish cities, and at the almost 100 Economic and Commercial Offices established in Spain's Embassies and Consulates worldwide.

Foods and Wines from Spain, a brand belonging to ICEX, is used to promote the Spain's Wine and Food sectors in major export markets, such as the USA. To this end, every year, in coordination with ICEX, the TCSNY plans, executes, and monitors a wide range of activities, targeting trade (importers, distributors, buyers, chefs, procurement managers), which occasionally include the end consumer. Gastronomy plays a central and key role in this strategy as a means of promoting Spain's food and beverage products to the various audiences and stake holders.

The activities carried out each year include a series of educational and promotional activations, which take into consideration the opportunities, challenges, and trends of the US market as well as the position of Spain relative to that of its major competitor countries in the US market.

### 1.2. Food and Wine Industry information

#### Overview

Spanish food and wine compete with the rest of the world for position and consumer recognition in the US market. In the last decade Spain has positioned itself as a gastronomic trailblazer and as a leader in creativity and innovation.

In 2023, 3.1 billion dollars of foods and wines from Spain was exported to USA, which translates into approximately 9 billion in retail dollars.

Olive Oil and Wine are the two big products exported to the US.

**Wines from Spain** offer an extensive range of world class wines crafted from indigenous and organically grown grape varieties, displaying the regional diversity of its 101 protected designations of origin. With traditions in winemaking dating back to Roman times, and more acreage under vine than any other country, Spain today is the third largest producer of wine, the world leader in wine exports and the #1 leader in organic vineyards planted.

In the US market, Spanish wine imports currently rank seventh in volume and fourth in value, offering plenty of opportunity for growth. Wines produced in Rioja, Ribera del Duero, Rias Baixas and Rueda with the native Tempranillo, Garnacha, Albariño and Verdejo grapes are most widely distributed in the US, along with Cava, Spain's signature traditional method sparkling wines, as

well as the unparalleled fortified Sherry wines of Jerez. But less familiar regions working with Monastrell, Mencia, Bobal, Cariñena, Godello, Macabeo and dozens of other indigenous varieties have also found the favour of the US wine media, trade and wine loving consumer.

Other quality alcoholic beverages to highlight and which are beginning to make inroads in the US market, include vermouth, regional ciders, craft beers and a growing line of artisanal gins and spirits.

**Foods from Spain** includes a variety of quality and gourmet foods such as: olives, olive oils (i.e. gourmet EVOO sourced from estate grown olives), sherry vinegar (from Jerez a unique product with Designation of Origin), cheeses (famed Manchego, Murcia al Vino, and many more gourmet cheeses), Ibérico meat, Ibérico ham and charcuterie (Spain's gastronomic jewel), tinned fish preserves – tuna, anchovies (boquerones), sardines, octopus, etc., piquillo peppers, piparra peppers, quince paste, crackers, tortas, gourmet potato chips (truffle, Ibérico ham flavor), pimentón (unique distinctive smoked paprika), saffron, marcona almonds, honey, dried fruit cakes, chocolate. Fresh fruit and produce such as persimmon, lemon, garlic, citrus: lemons and clementines, etc. We also have frozen octopus, squid and bluefin tuna, which have become an important product for Spain in the foodservice channel.

**Spain's gastronomy** is varied, traditional, modern, and cross cultural, giving and taking from the world. Regional traditions are interpreted and reimagined. Famous chefs in Spain such as the Adria Brothers, Ferran and Albert; the Roca Brothers; and the king of grilling Victor Arguinzoniz of Asador Etxebarri, are joined in the US by the irrepressible force of Chef Jose Andres, his team at Jose Andrés Group and Mercado Little Spain in NY, as well as many excellent independent chefs creating exquisite Spanish cuisine in different regions of the country. These include Chefs Alex Raij and Ed Montero of Txikito and La Vara in NY, Chef Luis Roger of BCN and MAD in Houston, Chef Dani García of Casa Dani in New York City, Chef Katie Button of Curate in Asheville NC, and Chef Javier Canteras of Urdaneta in Portland OR, among others.

The specific initiatives, aimed at achieving the ultimate objectives of this briefing, are described as follows.

### **1.3. Objective**

ICEX and the TCSNY is seeking to form **two (2) Advisory Councils** to access the expert advice, of industry professionals, in the wine, food, and gastronomy sectors, with a deep knowledge of the US market and latest trends. The councils would offer a series of recommendations regarding the positioning of Spain's products and help define the strategy and shape future actions to be taken by Spain's exporting companies and public institutions, to further develop their position in the US market.

To that end, we are seeking to hire the services of a well-respected Consultancy to set up and moderate the Advisory Councils' working sessions, design and conduct any necessary research, and draw up summaries and conclusions following each session, in line with the requirements set out in this briefing.

The consultancy will need to present the conclusions drawn from the Advisory Councils' meetings at a live event entitled the **#Spain Food Nation Summit**, that will target a professional trade audience (Spanish exporters, US importers, representatives of the foodservice (hospitality) sector, retailers, culinary and wine schools, food, and beverage trade press, etc.).

The first edition of the #SpainFoodNation Summit in US took place in October 2023 during which the results of an extensive benchmarking research project on Spanish wine in the US, as well as the conclusions of the 2023 Foods and Wines from Spain Advisory Councils were presented. For more information about the 2023 event and the members of the Council please refer to: [Spain Food Nation Summit US 2023 \(foodswinesfromspain.com\)](https://foodswinesfromspain.com).

A final report/ conclusions document was prepared, giving an overview of the general situation of Spanish products in the US market and the recommendations of the advisory council members and the panel of experts participating in the Summit discussions.

The general theme and questions that will be addressed in the 2024 Advisory Council sessions are included in Annex 1 and Annex 2 of this document.

## **1.4. Scope of the Contract**

### **1.4.1. Advisory Councils**

The two councils should be comprised of leading, well-respected professionals from the US Foodservice, hospitality, wine, and beverages sectors. These experts should have a profound knowledge and understanding of the US Foodservice market, current market trends, and be willing and able to offer recommendations and guidelines of actions to help define the promotional strategy for Spain's wines and foods in the US. The slate of candidates should be representative of the US market. Examples of realistic recommended candidates should be included in the technical proposal.

The Advisory Councils will be expected to discuss and debate a set of issues identified beforehand by the Strategy Consultant, who will be tasked with leading the councils' meetings. Given that the features, channels, agents, media, and regulatory framework differ for wine/alcoholic beverages and food in the US market, the Advisory Councils' discussion groups will meet in separate sessions, with at least one discussion session focused on food and another focused-on wine and alcoholic beverages.

The work involved in the planning, execution and moderating of the Advisory Council sessions will be the responsibility of the Strategy Consultant. The planning should include the audio-visual recording of any virtual and in-person sessions, as well as the compilation of the Advisory Council discussions in a final **Conclusions Report**, which may be published and made available to the regions and companies through ICEX's various communications and information channels.

Specifically, the Consultant will be required to perform and deliver the following:

- **Identify and recruit Advisory Council Members.** Secure the participation of at least 6 experts for each of the two Advisory Councils. The profile of members invited to take part should include industry leaders, such as representatives of the Foodservice / Hospitality sector, importers, distributors, sommeliers/ beverage directors as well as educators in culinary, hospitality and wine schools, etc. The selected participants must be willing to share their knowledge and experience to help define the strategy for promoting Spanish wines, beverages, and food in the US Foodservice sector.

- **Prepare the councils’ working sessions**, in line with the different formats described in this document. The Consultant will be required to provide research on the issues to be discussed, together with recent market reports by third parties or any qualitative evidence and testimonials on the market positioning of Spain’s foods, wines, and beverages within the Foodservice sector, which will form the basis for the councils’ discussions.
- **Conduct one on one interviews with Advisory Council members** to gather their opinion on key topics and prepare the meeting and conclusion document.
- **Prepare an agenda prior to each session** outlining the points to be covered and send any relevant information to the members of the council, following up with each of them to confirm their attendance.
- During the meetings, **moderate and steer the councils’ discussions** in line with the agenda to ensure that all the topics previously agreed upon with the TCSNY are properly addressed and analysed.
- **Take notes of all the issues discussed** by the participants, which will serve as the basis for providing detailed minutes of all the topics discussed and for drawing up the various reports required: (\*these documents will be of an internal, private nature).
- **Record short “testimonial” videos** with each of the Council members that can be used for promotional purposes and possible replay at the Summit and on ICEX social media channels.
- **Present the main conclusions** from the meetings in person to TCSNY.
- **Prepare a comprehensive Advisory Council Conclusions Report\*** for each of the Foods and Wines Advisory Council sessions. (ICEX will provide a standardized template for the report, which should have an approximate length of 30-35 pages.) Consultant may interview and cite additional experts that are not members of the Advisory Councils for the report.
- **Advisory Council Conclusion Document** must be ready for publication 2 weeks prior to the Summit.

\*The focus topics for each of the 2024 Advisory Councils can be found in **Annex I** and **Annex II** of this Brief.

#### **1.4.2. #Spain Food Nation Summit**

The conclusions from the 2024 Advisory Councils will be presented and discussed at a live event titled **#Spain Food Nation Summit**, (Summit) to be held the morning of the annual **Spain’s**

**Great Match** tasting event in New York City on **October 1, 2024**, targeting a professional trade audience of Spanish exporters, US importers, distributors, representatives of the hospitality and retail sectors, trade press, etc.

ICEX has a separate budget to cover the venue, catering, audio visual and event photography expenses and will make both the booking and payment arrangements outside of the scope of this Briefing. The Strategy Consultant has no logistical responsibilities for organizing the event beyond those included in this brief.

The Consultant will be responsible for the following Summit deliverables:

- **Prepare Roundtable content:**
  - Provide **guidance and ideas** for the Summit's roundtable discussions, format, content, and reach.
  - **Identify, invite and secure 6 influential members** with different professional profiles, from the foodservice, hospitality and wine trade and media to be part of each of the Summit round table discussions.
  - It is expected that each round table would be moderated by either the senior consultant or an influential and relevant trade media editor.
  - At least two members of each of the food and wine Advisory Councils take part in their respective round table discussions.
  
- **Develop and implement plan to secure a high-quality relevant trade and media audience for the Summit:**
  - Identify and invite relevant food and wine trade and media representatives to the event and rigorously follow up with them to secure maximum attendance (60 attendees).
  
- **Manage Summit invitations, pre-registration, and on-site registration** to include the following:
  - Organize the **sending of invitations** to the selected target audience.
  - Provide complete information of the event to be included on the **Summit event webpage** of the Foods and Wines from Spain portal. [This is the link to last year's page.](#)
  - All event-related communications should contain the link to the event webpage.
  - The **registration page** for invited contacts should specifically be the Summit event page on the ICEX portal, featuring a Register CTA button leading to the registration page.
  - Consultant will monitor replies to ensure maximum attendance and provide on-site registration management during the Summit.
  - Provide a post event report detailing registrations and attendees (inc. full contact details) directly to the TCSNY.
  
- **Create and Manage production of event materials**, utilizing graphics and design elements provided by ICEX (digital invitations, graphics, advertising, and printed on-site signage, roll-up banners, etc.)



- Ensure that all graphic artwork conforms to *Foods and Wines from Spain's* brand identity and has been approved by the TCSNY.
- While digital formats are preferred, any printing must be on FSC certified paper, using environmentally friendly ink.
- **Be responsible for hiring and making direct payment to selected service providers:**
  - Reserve a budget for media partner support, to ensure the attendance of professionals from the desired segments of the trade and media.
  - Reserve budget for any travel stipends for out of town invited round table participants.
- **Coordinate Summit photography shots and short video clips** with the event photographer, to be uploaded to the *Foods and Wines from Spain* YouTube channel and website:
  - Record 4-5 brief statements by selected industry attendees in video. These statements should include perceptions about the event and the person's views on foods and wines from Spain.
  - List of potential interviewees should be proposed by the Consultant prior to the event and approved by FWS.
- Prepare **day of event Summit agenda** which should include:
  - Official Welcome (ICEX, MAPA and TCSNY)
  - Wine and Beverage roundtable and conclusions – moderated by the Consultant.
  - Food and gastronomy roundtable and conclusions – moderated by the Consultant.
- Following event, prepare and deliver a complete **Final Report of Summit** describing both the different tasks undertaken as well as the results of the event, including complete contact information for all attendees, **no later than October 30<sup>th</sup>, 2024**.

**NOTE:** The Consultant will be responsible for hiring and payment of any out-of-pocket third-party expenses, including advisory council members' attendance related costs.

## **2. PURPOSE OF THE CONTRACT**

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To select a Strategy Consultant with extensive experience in the food and beverages industries in the US, who will be tasked with performing all the tasks associated with defining, preparing, organising, implementing and following up on the #Spain Food Nation Advisory Council, as well as the coordination and execution of the presentations and roundtables at the Foods and Wines from Spain Summit, per the terms set out in this document.

The Advisory Council sessions are intended to gauge US trade perceptions of Spanish Food, Wines, and Beverages, discuss industry trends and their potential impact on Spanish producers,

and provide recommendations and counsel to ICEX / #Spain Food Nation, associations, and the Spanish exporting companies. #Spain Food Nation may choose to base future marketing programmes on these recommendations.

### **3. CONTRACT, APPLICABLE LEGISLATION AND JURISDICTION**

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**Project contract.** Once the successful company has been selected, a **contract will be signed between ICEX and the Consultant** (hereinafter referred to as the Contract) which will include copyright and intellectual property clauses, activities to be carried out, payment terms and conditions, and other details.

**Applicable legislation.** Spanish legislation shall be applicable to the contents of this tender. All works shall be governed by the terms of the agreement entered between the awardee Consultant and ICEX and by the tender specifications, which shall be incorporated into the same, and in default of the above, Spanish legislation shall be applicable.

To solve any dispute, disagreement, issue or claim which may arise from the performance of the Agreement executed with the Awardee of this tender, the matter will be referred to the Ordinary Courts and Tribunals of Madrid (Spain), expressly waiving any other jurisdiction. The language used in any dispute shall be Spanish.

### **4. CONTRACT TERM**

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The contract term will run during the year of the signing of contract. The contract can be renewed up to four times.

### **5. CONTRACT BUDGET**

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The total **maximum available budget** for the contract term including the four renewals is **375,000.00 USD** (excluding taxes), inclusive of fees, and any third-party expenses. The maximum available budget for each year the contract is renewed is **75.000 USD**.

Under no circumstances can the budget be exceeded.

The financial proposal will be considered based on prices offered, excluding taxes, which must be clearly described and itemised.

### **6. PAYMENT AND INVOICING**

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**Contract amount.** The parties will only be bound by the content and amount stated in the Contract. The Consultant should not incur any expenditure on behalf of ICEX prior to the date of signature of the corresponding contract and without prior approval from ICEX, represented by the TCSNY.

Should any of the planned activities/services not be carried out the budget allocated to the respective activity/service will be deducted from the overall budget. Replacement activity/service, of a similar nature to and up to a maximum cost of the activity that has been cancelled will need to be agreed prior to implementation and it may be necessary for the contract to be amended accordingly via an Appendix under section 13 of this document.

**Invoices and reporting.** Corresponding invoices are to be provided to ICEX in 3 (three) instalments:

- Instalment 1: An initial payment of 30% will be made upon approval by TSNY of the confirmed list of participants for both sections of the Advisory Council.
- Instalment 2: A second payment of 30% will be made after the Advisory Council sessions have taken place and submission of the Advisory Council reports.
- Instalment 3: A third payment of the remaining 40% will be made upon completion of the program and both final report and Summit video have been delivered and approved by ICEX. The final report should include conclusions and recommendations and be completed by October 30<sup>th</sup>, 2024, at the latest.

**Invoice details.** All invoices submitted to ICEX must be issued to:

ICEX España Exportación e Inversiones, E.P.E.  
VAT No.: Q 2891001 F  
c/o Trade Commission of Spain  
405 Lexington Ave., 47<sup>th</sup> floor  
New York, NY 10174

And must be sent electronically to [nuevayork@comercio.mineco.es](mailto:nuevayork@comercio.mineco.es)

ICEX's VAT exemption number, Q2891001F, must be quoted on all invoices.
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**Assignment of the contract.** Assignment of the contract to a third party is not permitted.

## **7. CONSULTANT PROFILE AND REQUIREMENTS**

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- a) **Company profile.** ICEX is seeking a consultant with proven expertise in in the food, wine, and gastronomy sectors. The Consultant must have the human and material resources necessary for the successful implementation of the project outlined in this briefing.
- i. **Meetings.** The Consultant must be able to hold meetings with ICEX, represented by the TCSNY, on both a regular and an ad hoc basis. These meetings may take place by video conference, if required.
  - ii. **Languages.** Communication between ICEX and the Consultant will be in English.

**b) Administrative requirements: Project human resources.** The Consultant must demonstrate that it possesses both the tangible and intangible resources necessary for the successful implementation of the project described in this briefing. To enable an effective evaluation of the capacity to undertake the project, the Consultant must detail all technical resources to be deployed and state the names of the core team that is responsible for the project.

The requirements set out below regarding staffing are **mandatory**. Consulting firms that do not present in their offer a team that meets all the requirements, will be excluded. However, it is possible to comply with the requirements through subcontracting or joint ventures, among others, and providing documentation that legally demonstrates the stated relationship.

The role of each team member assigned to the project must be **clearly** specified in the Consultant's proposal. In addition, their **detailed** CVs must be included in the proposal (see Appendix II).

Should any member of staff assigned to our account leave the project during the term of the contract, they must be substituted by a person of at least the same qualifications.

- The **Strategy Consultant** tasked with organising and moderating the meetings of the Advisory Councils must have experience of similar activities, to which end he/she must demonstrate that they have:
  - A **minimum 5 (five) years of verifiable experience** in food and wine consulting, marketing, and communications, based in the US.
  - Established relationships with influential leaders and senior executives in both the food and wine industries (importation, distribution, on- and off-trade sales, education, and media).
  - Established relationships with executives and senior managers in the restaurant hospitality trade.
  - A strong and proven track record in food, gastronomy, wine and other alcoholic beverage marketing, and promotion throughout the US.
  - The ability to recruit 5-6 leaders representing different segments of the food and hospitality industry to attend the annual wine session of the Advisory Council in New York.
  - Professional moderating skills that pull the diverse views of Council participants into the discussion regardless of the moderator's own viewpoint with the aim of stimulating discussion and opinions from the entire group.
  - Knowledge of how the Spanish alcoholic beverage and food industries are organised and function in the US market.
  - Sufficient qualified staff to efficiently manage the planning and logistics of the Advisory Council meetings and Summit.

- Availability to travel to Spain if required to present the main conclusions of the Advisory Councils' sessions.

In addition to the Strategy Consultant, the staffing team must consist of a minimum of two different members, with each member fulfilling one of the following roles only:

- **Senior Project Manager:** Senior Consultant member exclusively responsible for the planning, organisation, and overall implementation of the project. This person should have a minimum of 3 (three) years of verifiable experience in food, wine, and other alcoholic beverages marketing and communications, based in the US.
- **Assistant Project Manager:** Designated team member, with a minimum of 2 (two) years of experience in promotional campaigns, exclusively responsible for all reporting to ensure compliance on a timely basis with ICEX's requirements.

The Consultant must designate a primary contact person who is informed of all aspects of the contract, including administrative matters, and has direct continuous communication with ICEX, as represented by the TCSNY.

It is expected that all key team members assigned by the Consultant to the contract have specific knowledge of and professional expertise in the US food, alcoholic beverage and hospitality industry, are fluent in spoken and written English, and will remain as part of the team for the duration of the contract period.

**c) Administrative requirements: Financial solvency.** All participating companies must submit a solvency report that includes the financial accounts for the last three financial years (2020-21, 2021-22, 2022-23). Financial solvency will be deemed established when the annual turnover, based on the best year of the last 3 (three) financial years available, and depending also on the date on which the tenderer was incorporated or commenced trading and the date on which the tender was submitted, equals or exceeds 75,000 US Dollars.

If it is not possible to prove economic and financial solvency by means of annual turnover, the tenderer may accredit such solvency by providing professional risk liability insurance for an amount equal to or greater than 75,000 US Dollars.

Where the Consultant tendering will be sub-contracting or engaging in a joint venture with another Consultant or other consultancies for the purposes of this contract, the financial requirements specified above will apply to the consultancies jointly, not singly.

**d) Non-compliance.** Failure to comply with any of the requirements set out in this section will result in the disqualification of the Consultant in question. However, ICEX allows participating consultants to demonstrate compliance with the requirements set out in this briefing by subcontracting companies that do fulfil those requirements, by setting up joint ventures or by entering into other business cooperation agreements that make it possible to show compliance with the solvency conditions specified.

In this case, consultants must clearly indicate in their bid whether they are using any of these options to fulfil the requirements set out in these specifications and must also provide documentation that legally demonstrates the scope and commitment of the relationship between the companies involved.

- e) **Conflict of interests.** The selected Consultant must guarantee that during the contract period it will not work either in whole or in part for other clients, whatever their nationality, who have interests that may conflict with those of ICEX in this contract.

## **8. CONTENT OF PROPOSALS**

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**Content of proposal.** Participating consultants must submit a proposal including **3 (three) separate documents** (1.-Administrative Requirements; 2.-Technical Proposal and 3.-Financial Proposal), as detailed below. Proposals that do not include all these documents will be considered incomplete and will therefore be excluded.

### **Document 1: Administrative requirements for the Consultant (in PDF format).**

All consultants submitting bids must provide an electronic file in PDF format (See Sec. 7 Consultant Profile and Staffing stipulated requirements) containing the following files:

- **Letter of acceptance.** All participating consultants must submit a letter of acceptance, signed by a legal representative of the company, accepting every term and condition stipulated in these specifications. Letter should also state that the team fulfils the stipulated requirements (**see clause 7.b**). Do NOT include their names or CVs in this letter.
- **Project references.** To evaluate the technical capability for undertaking the project, the Agency must include a list of at least three previous projects with similar characteristics and/or scope carried out within the last five years, including entities for which they have been executed. The references submitted must indicate dates and a brief description of the activities carried out.
- **Financial solvency.** All participating consultancies must submit **financial accounts for the last three (3) financial years**, as indicated in **clause 7.c**. If the bidder should choose to accredit financial solvency by taking out civil liability insurance, an undertaking to take out professional risk liability insurance for an amount equal to or greater than 75,000 US Dollars must be provided.

### **Document 2: Technical proposal of the Consultant (in PDF format).**

*(See Sec. 1.4 Scope of the Contract and Sec. 10 Evaluation Criteria)*

**Any mention or indication of cost for services can only be mentioned in Appendix I of Document 3. Otherwise, proposal will be disqualified.**

**Technical proposal:** Applicants must submit a detailed proposal for the project, **excluding any reference to price**, and a work plan in line with the above strategy and objectives. This should detail the work proposed to be undertaken in all project categories, including Consultant’s strategy, means of implementation, all deliverables and work plan.

The technical proposal should disclose, at a minimum, the following information with regards to the **list of Advisory Council members**: full name, professional affiliation/title, city of residence, gender, itemized indicators and/or statements of merit and/or webpage references demonstrating:

- Relevant know-how, industry/media experience, and prominence to contribute to the Advisory Council findings and recommendations.
- A list of realistic targeted professionals that have interest in serving on the Advisory Councils.
- TCSNY may request documental proof or accreditation of any of the indicators or statements of merit included by the Consultant in support of members adequacy to be invited to Advisory Council meetings.

The Consultant may include two additional members, in excess of the number of members per sector specified in **sec 1.4.1. Advisory Councils** of this briefing, as alternate members or replacements should there be any scheduling conflicts preventing full members’ attendance to Advisory Council meetings.

To deter the inclusion of a speculative list of unconfirmed or unrealistic members, see “Termination” under Sec.12 of this briefing.

If the proposal submitted simply states that the Consultant can meet some or all of the requirements but does not provide information or detail on how they will do so, the technical proposal will be assigned a score of 0.

### **Document 3: Financial proposal and Project human resources**

- **Financial proposal for the tender** (fill out Appendix I provided in page 26 of this briefing)  
All participating consultants must submit a financial proposal, including a detailed project budget and a breakdown of all costs, as per the table in Appendix III (Excel file) of this brief. Taxes, if applicable, must be indicated in a separate section of the proposal. Proposals that exceed the base tender budget excluding taxes, as indicated in clause 5, will not be considered.
- **Project human resources** (fill out Appendix II provided in page 27 of this briefing). The proposal must detail the human resources available for the project, as indicated in **clause**



**7.b.** The Consultant must provide details of the team of employees to be assigned to this contract (hereinafter referred to as the Team), specifying the professional qualifications and previous projects undertaken by Team members, as well as a description of the functions and tasks to be performed, to ensure that the Team has sufficient resources and can carry out the program. A detailed CV for each team member should be included, in line with the model included in Appendix II (MS Excel file).

The requirements set out in this section are mandatory, and companies that do not propose a team that meets all these requirements will be excluded. While the Consultant may meet the requirements set out in this briefing through subcontracting, joint ventures or other business cooperation arrangements, the proposal must give clear details of which functions are to be provided via subcontracting. ICEX expects all key Team members assigned to the contract by the Consultant to be committed to the campaign for the duration of the contract.

As any change in the key Team members assigned at the beginning of this project could affect the way it is run, express prior authorisation must be obtained from ICEX for any such amendments.

## **9. PRESENTATION OF PROPOSALS**

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**Invitation to tender.** ICEX, represented by the TCSNY, will send this briefing to several specialised consulting companies and will publish the tender on the [ICEX Website](#) .

**Submission of proposals.** Companies wishing to take part in the tender process must send the following documentation, in digital format, to the following e-mail address **ONLY**: [tenders@icex.es](mailto:tenders@icex.es) , **by 6pm ET (New York time) on Tuesday, May 21, 2024**. Proposals not submitted by the deadline will automatically be excluded.

**Electronic files.** The bid must be presented in three separate electronic files, and the contents of these files must be as detailed in these general conditions. All files must be in digital format (PDF and MS Excel) only. Neither the e-mails nor the individual files sent as attachments may exceed 4MB in size. In the case of larger files, participating consultancies must use a previously verified file transfer service (e.g., WeTransfer, Dropbox or similar). They will be opened sequentially.

**Costs.** All costs incurred by the participating companies in the preparation of proposals, submissions and quotations will be borne by the companies themselves. Bid submission will not entail the payment of any fee or the reimbursement of any expenses by ICEX.

**Language.** Proposals must be written and submitted in English.

**Acceptance of terms and conditions.** Submission of a proposal and participation in this tender implies the express acceptance of all clauses contained in these terms and conditions by the participating company.



**Modification of proposals.** Once a proposal has been submitted, ICEX will not accept the submission of any modifications, additions, or corrections, unless such modifications, additions or corrections are in response to a clarification requested by ICEX.

**Clarification of proposals.** ICEX may invite participating consultants that comply with the administrative requirements of this tender document to clarify specific aspects of their technical or financial proposals. This must be done in writing.

**Conformity of proposals.** All companies submitting a proposal should be aware that ICEX will review the documentation submitted by each company to ensure compliance with all the requirements set out in this tender document (document 1). Failure to comply with any of the requirements set out in this tender document will result in the disqualification of the Consultant in question.

**Evaluation of proposals.** Document 1 (Administrative Requirements) will be opened and evaluated first. Once it has been verified that the participating company complies with all the requirements set out in these specifications, Document 2 (Technical Proposal) will be opened, evaluated, and assigned a score. Finally, Document 3 (Financial Proposal) will be opened, evaluated, and assigned a score. Therefore, the financial proposal will not be known until this final stage.

**Selection of the company to be awarded the contract.** A decision will be taken as soon as possible after the published deadline for the submission of proposals. All participating companies will be notified of the decision by e-mail, to enable the successful Consultant to commence work as soon as possible.

**Contact persons.** Queries regarding this tender must only be addressed in writing, by emailing [tenders@icex.es](mailto:tenders@icex.es) **no later than 6pm ET (New York time) on May 16, 2024.** In the interest of fairness, questions posed by participating companies, as well as the answers provided, may be shared with all other participating companies.

## 10. EVALUATION CRITERIA

The bids will be evaluated, and the contract awarded, in accordance with the following criteria:

Evaluation Criteria	Scores (maximum)
<b>I. Financial proposal</b>	<b>30</b>
<p>The Consultant with the lowest total budget (excluding taxes) will receive the highest score, and the rest will obtain the proportional score:</p> <ul style="list-style-type: none"> <li>• Most economical offer receives maximum score.</li> <li>• Rest of the offers will have the following formula applied: <i>points per offer = (price of the most economical offer / price of each offer) x maximum score (30)</i>.</li> </ul> <p>The Consultant must present the budget clearly according to the table in Appendix I.</p>	
<b>II. Human resources assigned to the project</b>	<b>20</b>
<p>Years/months of experience over and above the stipulated minimum will be considered. Specifically:</p> <ul style="list-style-type: none"> <li>• Strategy Consultant: having more than the minimum 5 years of verifiable experience in food, wine and alcoholic beverages marketing and communications, based in the US. 2 points per additional year, up to a maximum of 12 points.</li> <li>• Senior Project manager: having more than the minimum 3 years of verifiable experience in food, wine and alcoholic beverages marketing and communications, based in the US. 1 point per additional year, up to a maximum of 6 points.</li> <li>• Assistant Project manager: minimum of 2 years of verifiable experience in promotional campaigns, responsible for all reporting and accounting to ensure compliance on a timely basis with ICEX. 1 point per additional year, up to a maximum of 2 points.</li> </ul> <p>See section 7.b. for the full description of the requirements for these roles.</p> <p>The Consultant must present the project human resources according to Appendix II.</p>	<p>12</p> <p>6</p> <p>2</p>
<b>III. Technical Proposal</b>	<b>50</b>
<ul style="list-style-type: none"> <li>• ICEX will assess the quality and viability of the plan being proposed and the degree to which it effectively meets the aims of the Campaign, awarding points to each of the components within the Technical Proposal, as described below.</li> <li>• Technical Proposals that do not receive at least 25 points for component III.1 will automatically be excluded.</li> </ul> <p>ICEX will award points to each of these elements as follows:</p>	

<p><b>Non-compliant.</b> The proposal does not meet the basic requirements and/or lacks the basic information or details that would allow it to be appropriately evaluated.</p> <p><b>Partially compliant.</b> The proposal shows that the Consultancy meets some, but not all, of the requirements and/or does not provide sufficient information or detail on how it will do so.</p> <p><b>Fully compliant.</b> The proposal states that the Consultancy can fulfil all the stipulated requirements and provides the necessary information and details on how it will do so.</p> <p><b>Exceeds the requirements.</b> The proposal proves that the Consultancy can fulfil all the stipulated requirements, provides detailed information on how it will do so and excels in presenting actions or approaches that add value.</p>	<p>0% of the maximum score</p> <p>50% of the maximum score</p> <p>75% of the maximum score</p> <p>100% of the maximum score</p>
<p><b>III.1. Technical Proposal: Strategy and content of the proposal designed to deliver the project to ICEX’s specifications.</b></p> <p>ICEX will award a maximum of 45 points to the quality and viability of the proposed Content Plan. ICEX will assess the quality of the plan being proposed and the degree to which it effectively meets the objectives of the project.</p>	<p>45</p>
<p>III.1.a. Presentation of a detailed plan and a logical timeline to prepare Advisory Council meetings and gather opinions of members to obtain the most comprehensive and useful Conclusions document as possible.</p> <p>The plan should detail how tasks will be organized and how the Consultant staff and resources will be employed to achieve the project’s objectives. Consultants must indicate which tasks will be fulfilled by third party providers, if any.</p>	<p>15</p>
<p>III.1.b. Quality and viability of the proposed slate of Council members: position, relevance of the company they work in, proven professional trajectory, social media influence, network within the wine, alcoholic beverages, culinary and food industry, etc.</p>	<p>15</p>

III.1.c. Quality of the proposed Summit and Advisory Council media partners and potential members of the Summit's roundtables	10
III.1.d. Gender balance among Council members: a minimum 40% men or women.	5
<p><b>III.2. Technical Proposal: Innovations and improvements.</b></p> <p>ICEX will evaluate the innovations or improvements contained in the Technical Proposal awarding a maximum of five (5) points.</p> <p>ICEX will assess those elements of the proposal that involve notable innovations or improvements in terms of the design and/or execution of the project <u>at no additional cost to ICEX</u> (e.g., innovative forms of communication and other elements that add value to the project but are not covered in this brief).</p>	5
<b>TOTAL</b>	<b>100</b>

**Abnormally low bids.** Financial proposals will be evaluated to determine whether they may be considered disproportionate or abnormal. Bids will be considered abnormally low if (a) they are 20% lower than the maximum budget permitted, when fewer than three tenders are presented, or if (b) they are 10% lower than the average of all the bids submitted in the case that there are three or more tenderers, the highest price being excluded for the calculation of said average. When a bid is abnormally low, the participating company will be asked to justify its bid and its terms and conditions within seventy-two (72) hours of receiving ICEX's notification. Once the claim has been received or this period has lapsed, ICEX will decide, if necessary and having obtained technical advice, whether the bid is to be considered abnormal and may exclude it accordingly.

This clause shall not apply to information that is (i) in the public domain, (ii) already known to the party receiving it, (iii) disclosed in compliance with court orders or under legal obligations.

**Tie-breaking criteria.** In the event of a tie in the points obtained by two or more tenders, this will be resolved by applying the social criteria indicated below, and in the order specified. These will apply to staff working for the Consultant at the time of the deadline for the submission of proposals. The documentation supporting the tie-breaking criteria referred to in this clause must only be provided if a tie occurs, and not beforehand.

- Highest percentage of workers with disabilities or who are in a situation of social exclusion in the workforce of each of the tied companies, with priority given, if the percentages are equal, to the company with the highest number of permanent workers with disabilities, or the highest number of socially excluded workers.
- Lowest percentage of temporary contracts within the workforce of each of the tied companies.
- Highest percentage of women employed by each of the tied companies.
- If it is not possible to break the tie using the above criteria, lots will be drawn.

## 11. HIRING AWARD COMMITTEE

Members of the Hiring Award Committee

<b>Chair</b>	Katrin Naelapaa	Director, Wines from Spain, New York
Substitute	Mercedes Lamamie	Foods from Spain, New York
<b>Committee Member</b>	Jeffrey Shaw	Director, Foods from Spain, New York
Substitute	Carlos Galtier	Director, Interiors from Spain, New York
<b>Committee member</b>	Salomé Martínez	Deputy Deputy Director Food Industry Division, ICEX
Substitute	Lidia Escribano	Head of the Food & Beverage Department, ICEX
<b>Committee Member</b>	Almudena Muyo	Member of the Food and Beverage Department, ICEX
Substitute	Laura Velasco	Head of Gastronomy and Digital Strategy Dept, ICEX
<b>Secretary</b>	Pedro Patiño	Head of the Contracting Department
Substitute	Isabel Arias	Member of the Contracting Department

## 12. OBLIGATIONS

In terms of project management, the point of contact for the Consultant will be the TCSNY. In terms of invoicing, special care must be taken regarding the aspects established in clause 6, following the guidelines set by ICEX and adhering to the conditions established in the contract.

**Technical quality.** The Consultant will be responsible for the technical quality of the work and services performed over the course of this contract. The Consultant will also be liable for the consequences of any errors, omissions, inadequate methodology or incorrect conclusions in the execution of the contract that may affect ICEX or third parties. Specifically, the Consultant will be responsible for:

- Ensuring that both the implementation and the results of the work contracted comply with ICEX's quality specifications.
- Compliance with the deadlines agreed with ICEX in each case.
- Any omissions, errors, incorrect conclusions, or inadequate methodologies during the term of this contract.
- The staff forming part of the project team appointed to carry out the work stipulated in the contract. The Consultant will bear sole responsibility for the conduct and work undertaken by the team working on the contract.

- The processing of the information and data made available to it.

**Copyright and information rights.** All intellectual or industrial property rights appertaining to the work created by the Consultant and all the information gathered by it in connection with the contract shall belong to ICEX.

The Consultant shall, at its own expense, defend any claim or threatened claim brought by third parties against ICEX, insofar as said claim is based on the allegation that the work carried out by the Consultant within the framework of this contract infringes intellectual or industrial property rights of third parties or constitutes an undue appropriation of trade or industrial secrets belonging to third parties.

The Consultant is obliged to maintain professional confidentiality regarding the information and documentation provided by ICEX for the performance of the services.

The Consultant shall only permit access to the confidential information to those persons who have a need to know it for the purposes of carrying out the activities and services under the contract. The Consultant shall be responsible for ensuring compliance with the confidentiality obligations by the personnel in its employ and by any persons or entities working in collaboration with the Consultant or subcontracted by it.

The Consultant also undertakes not to use any confidential information belonging to ICEX to which it may have access for its own or private purposes or for any other purposes.

This obligation shall remain in force both during and after the end of the activities to which the contract relates, until the said information comes into the public domain or, for any other legitimate reasons, loses its confidential status.

Failure to comply with the obligations indicated above shall entitle ICEX to bring civil or even criminal actions against the Consultant for any liability that might be applicable.

**Confidentiality.** The Consultant accepts the obligation to maintain professional secrecy about the information and documentation provided by ICEX for the performance of the services. This obligation will remain in force both during and after completion of the activities covered by the contract, until such time as said information enters the public domain or for any other legitimate reason ceases to be confidential.

This clause does not apply to information which (i) is in the public domain, (ii) is already known to the party receiving it, (iii) is disclosed pursuant to a court order or legal obligation.

- The Consultant will only grant access to confidential information to those persons who require access to carry out the activities and services foreseen in the contract. The Consultant will be responsible for ensuring compliance with the confidentiality obligations by its staff and by persons or entities working in collaboration with the Consultant or subcontracted by the Consultant.
- The Consultant also undertakes not to use confidential information belonging to ICEX and to which it has access for its own private purposes or for any other purposes.

- iii. Failure to comply with the above obligations will entitle ICEX to institute civil or even criminal proceedings against the Consultant for any liability it may incur.

### **13. CANCELLATIONS AND TERMINATION**

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**Force Majeure or restrictions imposed by the Authorities.** The parties will not be responsible for the damages and losses caused to the other party because of delays or breaches of the contract due to force majeure or restrictions imposed by the Authorities. The duties of the contract will be considered suspended for as long as the situation of force majeure or restriction lasts, and the parties will try to reach an agreement in good faith that benefits their respective interests as much as possible.

In any case, the party that has knowledge of these facts must inform the other as soon as possible so that said duties are suspended or that the measures deemed appropriate are adopted. If the cause of force Majeure or restriction extends in time for more than three months, either party will be entitled to request the termination of the contract without having to indemnify the other party for it.

**Cancellation or postponement of events.** In the event an activity is not held, ICEX shall solely satisfy the expenses incurred by the Consultant from the date of signature of the contract (and in connection with the same) until the date of a formal notice of the cancellation by ICEX. To be reimbursed, the Consultant must submit all documentary invoices for the expenses incurred up to that date.

In the event that an activity is postponed, the parties will try to reach an agreement in good faith that benefits their respective interests as much as possible.

**Termination.** ICEX reserves the right to unilaterally terminate the contract if the services are not performed by the Consultant in accordance with the instructions received from ICEX, if any of the deadlines applicable to the Consultant are not met, or in the case of any breach of the obligations set out in the contract. This will be without prejudice to any additional claims for damages.

### **14. MODIFICATIONS OF THE CONTRACT**

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Once the contract has been formalised, the modifications considered necessary for its correct execution may be agreed, if they do not alter the global nature of the initial contract or imply a substantial modification.

In all cases, the successful tenderer shall provide in writing, at ICEX's request, proof of the pertinent technical, financial, or other requirements prior to any modification of the contract. The modification must be previously approved by ICEX, and the corresponding contract drawn up and signed.

## **15. APPLICABLE LEGISLATION**

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The services shall be governed by the terms of the contract entered into by the successful tenderer and by this briefing document, which will be incorporated herein. Failing this, Spanish legislation will prevail.

## **16. JURISDICTION**

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To resolve any dispute, disagreement, question or claim that may arise from the execution of the Contract signed with the awardee of this tender, the matter will be subject to ordinary jurisdiction.

The parties, waiving any other jurisdiction that may otherwise be applicable, expressly submit to the Courts of the city of Madrid.

## **17. EUROPEAN FUNDING**

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The activities contemplated under this briefing may be subject to European Union's financing.

The successful tenderer will be obliged to comply with the following:

- In the working documents, as well as in the reports and in any type of medium which is used in the actions necessary for the subject of the contract, the EU emblem must appear in an obvious and noticeable way, in making explicit reference to the European Union.
- In any public dissemination or reference to the actions provided for in the contract, whatever the means chosen (brochures, posters, etc.), the following elements must be included in a noticeable manner: the emblem of the Union European in accordance with established graphic standards, as well as the reference to the European Union funding: "Eligible for co-financing with European Union Funds".

## **18. ORGANIZATIONS**

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**ICEX España Exportación e Inversiones, E.P.E.** is a public business entity attached to the Spanish Ministry of Economy, Commerce and Business. It is represented in the US by the Trade Commission of Spain in New York. ICEX's mission is to promote Spanish exports, support the international expansion of Spanish companies and promote foreign investment in Spain.

**The Trade Commission of Spain in New York** is responsible for promoting trade and investment between Spain and the US within its sphere of competence.



**New York, on the date of signature.**

**ICEX Board of Directors  
By Delegation (Resolution dated 30 September 2021) Official State Bulletin (BOE)  
of 11 October 2021**

**Carlos Jiménez Aguirre  
Head of the Economic and Commercial Office  
Trade Commission of Spain in New York**



## APPENDIX II. Project Human Resources

(Template For Document 3 ONLY)

**Professional profile and background of the designated staff.** Include a detailed description of the roles of the proposed team and their respective detailed CV's and fill out an Excel file as per the template below.

- Strategy Consultant
- Senior Project Manager
- Assistant Project Manager

**Consultancies not satisfying any of the stipulated solvency criteria will be excluded from the tender.**

TEAM EXPERIENCE			
<b>STRATEGY CONSULTANT</b>			
	start date (mm/yyyy)	ending date (mm/yyyy)	description
Experience 1			
Experience 2			
Experience 3...			
<b>SENIOR PROJECT MANAGER</b>			
	start date (mm/yyyy)	ending date (mm/yyyy)	description
Experience 1			
Experience 2			
Experience 3...			
<b>ASSISTANT PROJECT MANAGER</b>			
	start date (mm/yyyy)	ending date (mm/yyyy)	description
Experience 1			
Experience 2			
Experience 3...			

## **Annex I. Discussion Topic for the 2024 Food and Gastronomy Advisory Council**

### *Target Audience of this work*

Spanish companies

### *What:*

Interested in exploring the Food Service Market in the USA with emphasis in the Casual Market segment (143.6 billion dollars in consumer sales in 2023) and Hotel chains, which fall under lodging segment (42.8 billion dollars in consumer sales in 2023, both combined segments representing 22% of the Food service market in USA).

### *The Need to promote Spain's food and beverages in the US*

Spain has a rich cultural heritage that also reflects in its gastronomy yet in the USA it continues to be relatively unknown with exceptions of certain areas of the country.

Several restaurants in Spain and its chefs have gained limited recognition and fame in the US, becoming ambassadors of Spain's gastronomy and Spain's products / ingredients. Events like [Madrid Fusion](#) help to create awareness among professionals for Spain's chefs and evolving gastronomy.

Currently ICEX is certifying Spanish restaurants for the authenticity of the ingredients and gastronomy, implicitly their quality, in the US. Restaurants from Spain initiative is managing to become a platform that recognizes and helps restaurants stand out in a crowded marketplace.

Unfortunately, the number of Spanish restaurants in the US is reduced relative to the size of the market and viewed as a niche cuisine. Tying Spain's ingredient and beverage exports exclusively to these restaurants is very limited. This takes us to the need to further promote the interest and demand for Spain's products amongst chefs and restaurateurs as they represent a sizeable opportunity.

*The challenge is to define the opportunity, explain how to gain access and how to successfully promote Spain's products to the Casual Dining and Lodging market segments.*

### *Example of the products Spain exports to US in premium segment*

Foods from Spain includes a variety of quality and gourmet foods such as: olives, olive oils, Jerez (sherry vinegar), cheeses, Iberico, charcuterie, fish preserves – tuna, anchovies (boquerones), sardines, etc -, piquillo peppers, quince paste, crackers, tortas, gourmet potato chips (truffle, iberico ham flavor) pimentón, saffron, marcona almonds, honey, dried fruit cakes. Fresh fruit and produce such as persimmon, lemon, garlic, etc.

*This work needs to deliver on these key areas:*

The consultant will need to conduct prior empirical research to define Spain's Food and Beverage position in the Foodservice market.

The recruited Advisory Council should provide analysis of Spain's position in the Food Service Market.

The market research should provide:

- A statistical picture of Spain's market position
- Explain logistically and commercially how the Casual and Lodging / hotel dining segment work. Who does what to whom? How does the system work? What are the incentives? How do new products get in and work in this segment? What are the key incentives that need to be provided (e.g. Spiff programs, free product, of case pricing, rebates, etc).
- Research and explain how demand is created and how it can be created for specific Spanish ingredients recognizing the challenges they must overcome. Who are the key decision makers and how to approach and incentivize them to try and adopt Spain's ingredients in their menu's.
- The difference in size of operation on who decides (e.g. the Exec / Sous chef vs a procurement manager). Who influences who?

All these aspects should be analysed in the Advisory Council with the aim of providing recommendations on specific actionable programs to participate in or create and execute which will get Spain producers and products in front of decision makers.

*At summit meeting focus on summarizing and explain practical steps / strategies for HORECA Integration*

To capitalize on the potential of Spain's ingredients and gastronomy in the U.S., strategic initiatives tailored to the American market are crucial. Here are key areas to explore:

- Casual Dining and Hotel / Lodging Integration: Analyse and develop strategies to introduce Spanish products into hotel menus and operations. Identify suitable products and explore effective implementation methods.
  - Olive Oil: How can olive oil be incorporated into hotel kitchens and restaurants? What formats are most appropriate?
  - Premium Canned Goods: What is the potential for premium canned Spanish products, and how can they be introduced effectively?
  - Room Service: Can Spanish ham be offered through room service menus?
  - Minibar and Cocktail Lounges: Can almonds and table olives be promoted in minibars and cocktail lounges?
  - Tapas: Are there specific tapas that resonate with American consumers and can be integrated into hotel offerings?
- Product-Market Fit: Identify Spanish products with the most potential in the U.S. market. Focus on products offering value addition, complementing existing American cuisine and catering to local palates.
- Trending and Trending-Forward: Explore products and dishes generating buzz among American food enthusiasts and consider their potential for wider market adoption.

By implementing these strategies, the Spanish foodservice industry can tap into the vast potential of the U.S. market, fostering cultural exchange, promoting its unique culinary offerings, and creating a thriving space for Spanish cuisine in the American food landscape.

## **Annex II. Discussion Topic for the 2024 Wines Advisory Council**

### *Need for improved positioning of Spanish Wine*

Spain is one of the leading wine producing countries in the world. It concentrates 13% of the vineyard surface globally, and 15,3% of the ecological surface. This makes Spain the third largest wine producer in the world.

Although Spain is the second largest exporter by volume, it only accounts as the third largest exporter by value, far behind France and Italy. Even though there are many positive qualities associated with Spanish wine, Spain is not managing to capitalize on these and has only captured 4% of the additional value generated in the wine export market since 2013 (Source: OIVE Strategic plan).

This situation requires rethinking about how best to improve the positioning of Spanish wines and the perception that they generate in the US and other major export markets.

### *A revised narrative for the positioning of Spanish Wine*

To improve the positioning of Spanish Wine in the US market and allow it to gain higher status in line with its quality and diversity, Spain needs to improve its country image. This country image can then be projected to its wines.

An essential part of this country image is to have a narrative shared by stakeholders about Spain's wines. Careful curation and sharing of the values communicated about Spain and Spanish wines in the storytelling could help achieve a higher position for Spain's wines if adopted in coordination with the many stakeholders, beginning with the governmental institutions, regional control boards and the exporting wineries.

The US is culturally very diverse, and the consumption of wine is not as consolidated throughout the country as that of the major European markets where Spanish wine is most popular. The US is a major wine producer in its own right and high-quality imports from France and Italy dominate. The per capita consumption of wine is still relatively low, although much higher in metropolitan markets. Spanish wines are more widely distributed than *ever before, but still lagging in their presence in retail stores and restaurant wine lists. Given the reach offered to even the smallest brands by e-retailers such as wine.com, and the adoption of social media and information rich digital platforms, Spanish wines have opportunities for growth and adoption that can be aided by a shared narrative that points to the intrinsic values of the country, its viticultural resources and culture.*

### *Differentiating values for Spain's storytelling*

- Wine is part of the rich cultural history and landscape of Spain. Spain is wine country from north to south and east to west. Vineyards and wine are embedded in local communities throughout the country.
- Lifestyle: Spain has a culture of celebration, rich gastronomy, and unlimited options for tourism.
- Quality and variety of Spanish wines has never been higher, whether one gravitates towards red, white, or sparkling wines.
- Younger generation of winemakers are committed to recovering abandoned vineyards, ancestral drought resistant varieties, and adapting practices to tackle climate change.

\*Conclusions and analysis from the Sept 2023 Wines from Spain US Benchmark Report will provide insight for the 2024 advisory council discussions