



SPECIFICATIONS

DESIGN & IMPLEMENTATION OF A COLLECTIVE
INFORMATION AND PROMOTIONAL CAMPAIGN
FOR EUROPEAN CHEESES
IN
BRAZIL, ARGENTINA AND CHILE
2020 – 2022

PURCHASER: Centre National Interprofessionnel de l'Economie Laitière [*French National Interprofessional Center for the Dairy Industry*] (CNIEL)

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CONSULTATION METHOD: OPEN TENDER

THE CNIEL: CENTRE NATIONAL INTERPROFESSIONNEL DE L'ÉCONOMIE LAITIÈRE

The CNIEL is an association created in the cow's milk sector, in 1974, by the national organisations representing milk production and processing. Acknowledged by the European Union and French law as an interprofessional organisation, the CNIEL helps to promote cow's milk and its derivative products (cheese, cream, etc.) in France and abroad.

The information and communication programme that is the subject of this contract is co-financed by the European Union and the CNIEL.

A co-financing application will be made to the European Union during the first quarter of 2019. This campaign may only be officially launched after full acceptance of the application and written agreement from the European Union.

The acceptance of the co-financing application by the European Union evidenced by a written agreement from the European Union is a condition precedent to the signing of a contract with the successful tenderer. Therefore, the contract will be signed only after the written authorization of the European Union has been obtained. Should the European Union refuse, the promotional campaign will not be implemented and no contract will be entered into by the CNIEL.

ARTICLE 1: PURPOSE OF THE CONTRACT

The purpose of the contract is the design & implementation of a collective communication and information campaign to promote European cheeses in third countries: Brazil, Argentina and Chile during the period from 2020 to 2022.

ARTICLE 2: DOCUMENTS MAKING UP THE CONTRACT

The documents making up the contract are as follows, in order of priority:

- The deed of commitment signed by the parties, to which is attached the schedule of unit prices (SUP),
- These specifications and its appendices,
- The successful tenderers bid.

ARTICLE 3: CONTEXT OF THE CONTRACT

INTRODUCTION: INCREASING DEMAND IN EMERGING COUNTRIES HAS DRIVEN DAIRY TRADE

Over the past decades, consumption of milk products in the world has been rising, which means more potential market opportunities for EU dairy producers. This growth is due to the increasing demand in emerging countries, supported by rising incomes (considered as the strongest driver of increased demand for dairy products), changing diets (increasing food intake and changing composition of food consumption), population growth and urbanization.

The EU is among the main players on the global dairy market. After 33 years, the end of the EU system of dairy quotas no longer controls the level of milk production. As EU markets for milk and dairy products are relatively mature, the supplementary volumes of milk that is produced is exported.

Due to the perishability of dairy products, the bulk of dairy production is consumed domestically without entering international trade. The main dairy commodities that are traded on global markets are Whole Milk Powder (WMP), Skimmed Milk Powder (SMP), butter, cheese and whey powder.

With recent changes in world trade such as the Russian embargo of EU Dairy, China's decrease in demand for WMP and EU consumption levels stable or decreasing, Europe is looking for growth abroad. Growth potential in Latin America spearheaded by a developing upper middle-class is leading the charge.

A successful three-year campaign in Brazil and current campaigns in Mexico and Colombia have opened the road for additional opportunities. As such, this RFP aims to renew a Brazilian campaign and add two additional markets – Argentina and Chile – to round out a Latin American expansion to raise awareness of imported EU cheeses to a foodie audience, chefs and media influencers.

About the markets: Brazil, Argentina and Chile

Characteristics of Distribution

- Cheese consumption and the points of sale vary according to different social classes. Wealthier consumers are more inclined towards fine groceries and imported specialty cheeses, while less favorable social classes will choose local cheeses at traditional markets.
- Modern supermarkets do not always dominate. In Chile and Brazil, supermarkets hold a high market share, 60%, followed by traditional grocery stores, 30%. The traditional circuit retains an important part in Argentina. In general, imported cheeses are present in modern stores and national cheeses in more traditional stores.
- For the most part, imports are carried out directly by supermarkets or via an intermediate importer. This intermediate importer is often specialized in the cheese / gourmet products trade.
- Three channels dominate the cheese distribution: retail distribution with supermarkets, traditional store and the F&B channel. In addition, specialty stores are appearing with higher quality products. Associated with a concentrated and niche market, specialty cheeses are closely linked to the qualitative F&B channel targeting an affluent population; these cheeses are also present in supermarkets although less diversified. In Argentina, more than half of cheese sales are made through traditional channels (market, neighborhood grocery store).
- In general, domestic brands predominate in each country. Often, local cheeses are often displayed separately a part from Imported cheeses.

Product Image and Consumption Trends

Cheese consumption is increasing. Argentina is one of the leading consumer of cheese with a high consumption level. Consumer habits are changing with a middle class increasingly inclined to test new products. Spending on necessities is increasing.

Integrated in cooking, cheese is consumed at any time of the day. Significant marketing efforts are being made to introduce new patterns of cheese consumption, including as a food on its own. Consumer education remains to be done in the association of flavors. In addition, low-fat option products are present on the shelves of supermarkets.

Population health concerns prompt state governments to take a position on notions of health and balanced diet. The consumption of dairy products is favorable.

European cheeses enjoy an image of quality and expertise in the three countries. Highlighting the European origins of the products makes it possible to justify a higher price point. In general, local consumers believe that European cheeses are a good value for the money: quality justifies the higher price. The upper/middle-class favors branded products by combining aspects of quality, taste and price.

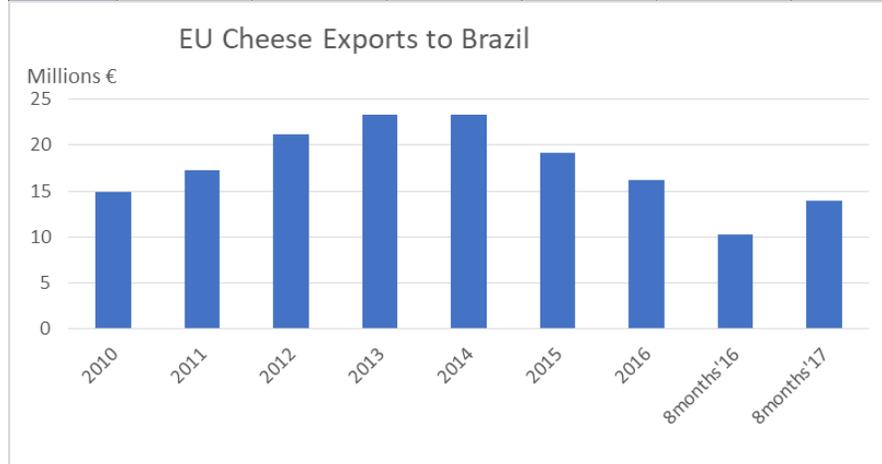
Cut to order sales remains insignificant in the three countries studied. In Argentina, it accounts for only 5% of cheese sales and mainly concerns locally produced cheeses while imported cheeses are packaged or sold by the piece. In general, packaged products are widely represented in distribution channels.

Knowledge of European cheese supply remains very limited for both professionals and consumers in Brazil, Argentina and Chile. The inequality of knowledge is prevalent when cross-referenced by social strata.

Brazil

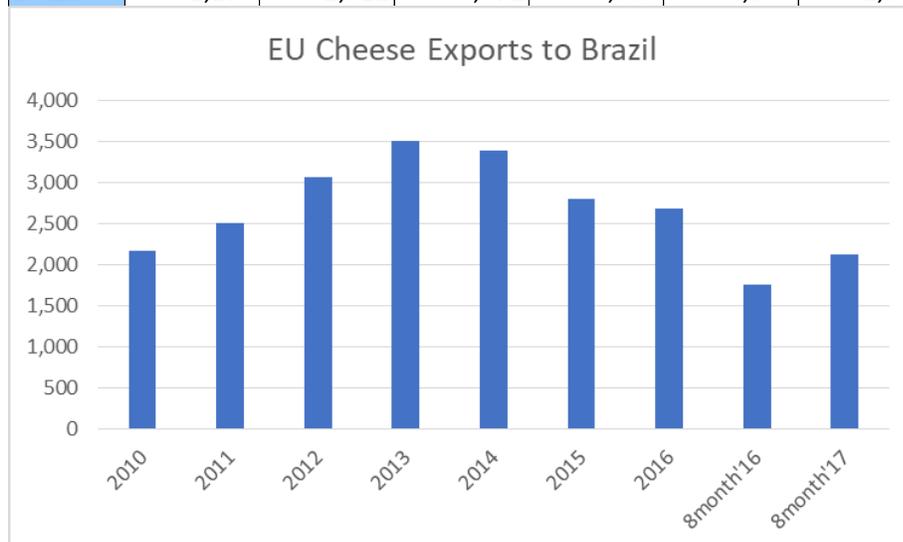
Exports of European cheese to Brazil (Value €)

	2010	2011	2012	2013	2014	2015	2016	8months'16	8months'17
Brazil	14,834,204	17,266,011	21,166,578	23,334,156	23,312,032	19,133,111	16,139,253	10,307,602	13,937,063



Exports of European cheese to Brazil (Volume in 1000 tons)

	2010	2011	2012	2013	2014	2015	2016	8month'16	8month'17
Brazil	2,176	2,512	3,071	3,505	3,393	2,807	2,684	1,752	2,132



About the country

Production:

In 2015/2016, Brazil had one of the most severe droughts since 1930, causing serious impacts in large areas of Brazil's southeastern region, in particular the states of São Paulo, Rio de Janeiro,

and Minas Gerais. Minas Gerais is the main milk producing state in Brazil, accounting for 26 percent of total milk production. The severe dryness had a negative impact on dairy production due to issues with pasture for animals but also in the production operations, specifically cleaning of the silos and maintenance of production lines. The dairy industry decided to reduce investments because of the risk due to the lack of the water supply. This scenario resulted in lower domestic milk production, which affected retail prices and milk availability in the market. Officials estimates milk production to reach 24.8 million metric tons (MMT) in calendar year 2015 and 22.7 MMT in calendar year 2016. Officials also forecasts that milk production will recover and reach 24.2 MMT in calendar year 2017.

Cheese:

Cheese production in 2016 is forecasted to decrease to 745 MT, the cause is mainly the milk shortage in the market and an estimated small growth in the fast-food sector. The forecast for cheese production in calendar year 2017 is to reach 772 MT. This slightly increase is boosted mostly for exports to Russia.

Trade:

Imports: Cheese imports in 2016 are projected to increase by 92 percent, because of reduced fluid milk suppliers. For 2017, officials forecast a slight decrease in imports due to the higher value of the Brazilian real and a continued drop in consumer income. Cheese manufacturers will try to recover the production volume from previous years.

Imports from Uruguay and Argentina increased significant amounts compared to other countries. The main reasons for this scenario, is that due the milk shortage, Brazil searched for low cost cheeses produced in these two countries. Imported cheese from these countries included mainly parmesan and "prato" cheese (yellow cheese), used in the food service sector.

Brazil Import Statistics								
Commodity: Cheese And Curd								
Year To Date: January - September								
Partner Country	Unit	2014		2015		2016		Change
		USD	QTY	USD	QTY	USD	QTY	%2015/2016
World	T	87,501,539	15,435	73,406,471	15,909	103,920,565	30,492	92%
Argentina	T	37,559,453	7,226	32,491,950	7,961	47,694,556	14,636	84%
Uruguay	T	25,020,148	5,530	23,564,674	5,726	43,659,655	14,122	147%
France	T	6,605,751	709	4,576,582	645	3,941,941	582	-10%
Netherlands	T	10,613,143	1,119	6,236,985	772	3,787,996	515	-33%
Italy	T	3,527,407	321	3,018,438	327	2,234,408	264	-19%
Germany	T	1,184,700	156	1,019,480	159	805,147	129	-19%
Denmark	T	360,653	34	692,314	71	471,400	52	-27%
Switzerland	T	446,619	28	380,346	30	346,214	29	-3%
Portugal	T	688,522	53	311,955	28	296,921	32	14%
United States	T	995,059	201	628,193	134	212,260	51	-62%
Spain	T	193,349	12	298,947	24	207,521	16	-33%
United Kingdom	T	306,735	43	145,192	26	184,109	42	62%
New Zealand	T	-	-	-	-	52,414	20	
Austria	T	-	-	41,460	6	26,023	3	-50%

Source of Data: SECEX – Foreign Trade Secretariat

Table - Tariff Rate Table			
Tariff Number (HTS)	Product Description	Rate (%) CXT *	Other Info
0406.10.10	Cheese, Mozzarella (1)	28	Mercosul: 27%
0406.10.90	Cheese, Other	16	Mercosul:0
0406.20.00	Cheese: Grated or Powdered	16	Mercosul:0
0406.90.10	Cheese, with a fat content less than 36 %, by weight (1)		Mercosul: 27%
		28	
0406.90.20	Cheese with a fat content superior or equal to 36 % and less than 46%, by weight (1)	28	Mercosul: 27%

* CXT: MERCOSUL Common External Tariff. The CXT tariff is applied to all imports other than from MERCOSUL. These tariffs are assessed on the CIF value of the product. Note (1): Effective June 1, 2001, these types of cheeses were included on the "exception list" of the Common External Tax (CXT), of the MERCOSUL, per Resolution 16/01, of the Foreign Trade Chamber (CAMEX), which altered Annex Two of the Decree Number 3,704 of December 27, 2000. The 27% tax is charged in addition to the Import Tariff of 16 percent for all imported cheeses, including MERCOSUL members.

Cheese consumption has almost doubled in Brazil in the last decade, with changes in habits, income evolution and greater supply in the industry. According to data from the Brazilian Association of Cheese Industries (Abiq) the Brazilian eats, on average, 5.3 kilos of cheese per year, considering numbers of inspected companies. Despite the growth, the values are still low compared to other markets in Europe or even South America, showing significant potential for expansion. In Argentina, for example, per capita consumption is twice our consumption; it is close to 12 kilos per year.

Brazil produces different types of cheese, which include those of the European tradition, such as mozzarella, gouda, parmesan, gorgonzola; and those of the American tradition (cheddar, cream cheese and cottage); as well as typical Brazilian cheeses like minas fresca, requeijao and curd. Some imported cheeses have also won loyal consumers, such as soft ripened, some Swiss and Argentine, but import accounts for only 0.3% of total consumption.

POTENTIAL ATTRACTS EXPORTERS

The Brazilian market has attracted interest from foreign companies since it is already an important consumer and with growth potential. The Brazilian consumer of cheeses is becoming more sophisticated.

TABELA 1
ESTIMATIVA DA PRODUÇÃO FORMAL DE QUEIJOS NO BRASIL, 2015

	Produção ^T	Importações ^T	Exportações ^T	Total kg
Produção nacional	1.105.431	21.550	2.522	1.124.459
Grandes <i>commodities</i> ¹	750.215	11.787	747	761.255
<i>Commodities</i> intermediárias ²	285.104	7.053	1.223	290.934
Queijos especiais ³	70.112	2.710	552	72.270

Fonte: ABIQ (empresas com SIF), 2016.

¹Grandes *commodities* - queijo mussarela, prato e requeijão culinário.

²*Commodities* intermediárias - queijo fundido, processado, fresco, minas padrão, coalho e parmesão ralado. – ³Queijos especiais - mofos brancos e azuis, amarelos especiais, suíços, duros e semiduros, e queijos de massa filada. – ⁴Nas importações e exportações foram considerados os seguintes grupos de acordo com a classificação da aliceweb:

Grandes *commodities* – mussarela, massa semidura e massa macia

Commodities intermediárias – queijo fundido, frescos, ralado e queijos de massa dura

Queijos especiais – mofados e outros queijos

Brazil, cheese importer

Table 1 shows the international cheese market. In 2015 Brazil imported 21,550 tons of different types of cheese and exported 2,522 tons, which places the country as importers of dairy products. The origin of imports was Argentina (50%) and Uruguay (36%) as well as EU cheeses from the Netherlands, France, Italy and Germany, and seven other countries. The main imported products were mozzarella, melted and semi-firm cheeses. In 2015, purchases totaled US \$95.6 million.

Brazilian exports are still quite small and totaled US \$10.8 million. Brazilian cheeses were consumed in 13 countries, but the biggest buyer in 2015 was Chile (39%); to a lesser extent, Paraguay (13%) and Taiwan (12%).

In the first six months of 2016, Brazil imported 17,417 tons, valued at approximately US \$ 57.1 million. Imports were mainly of mozzarella (36%) and semi-hard cheese (25%). These products came from Uruguay (46%) and from Argentina (25%). Exports, up to June 2016, yielded US \$ 5.7 million (1,394 tons exported) and went to 12 countries, with Russia and Chile being the largest buyers.

With the expectation of improvement of the Brazilian economy in the second half of 2016, consumption of milk and dairy products, mainly cheese, is expected to increase. With the rising

price of milk paid to the producer and the lack of the product in the domestic market, it is a good opportunity for Brazilian producers.

Consumer

Purchasing habits of Specialty Cheeses is concentrated mostly in Social classes A & B, which make up 97% of shoppers purchasing this type of product because of the higher price and previous exposure or knowledge of the product.

Other reasons for purchasing include the appearance, taste, recipe, price and convenience.

These products have margins of 25% to 45% on average.

Frequency of A/B Consumers purchasing Specialty Cheese in Brazil:
Multiple times a month: 12%
Twice a month: 66%
Once a month: 22%

Consumer profile:

56% female and 44% male

04% 13-25 years old

44% 26-45 years old

44% 46-60 years old

08% 60+ years old

Strengths of EU Cheeses in Brazil

- EU cheeses are very popular with high-end consumers
- Popularity of "Made in EU"
- Innovative taste
- Purchases of EU cheeses is perceived as a "Culinary experience" and placing oneself in another social category.
- Controlled cold chain/logistics

Weaknesses of EU Cheeses in Brazil

- EU cheeses are too pronounced in flavor for local market
- EU cheeses are considered expensive
- Difficulty in importing from EU, very procedural

Opportunities

- The consumption habits of Brazilians are changing and EU cheese has a role to play in this quest for refinement.
- Potential for association with other products
- Homologation of production methods between Europe and Brazil, which will facilitate administrative procedures

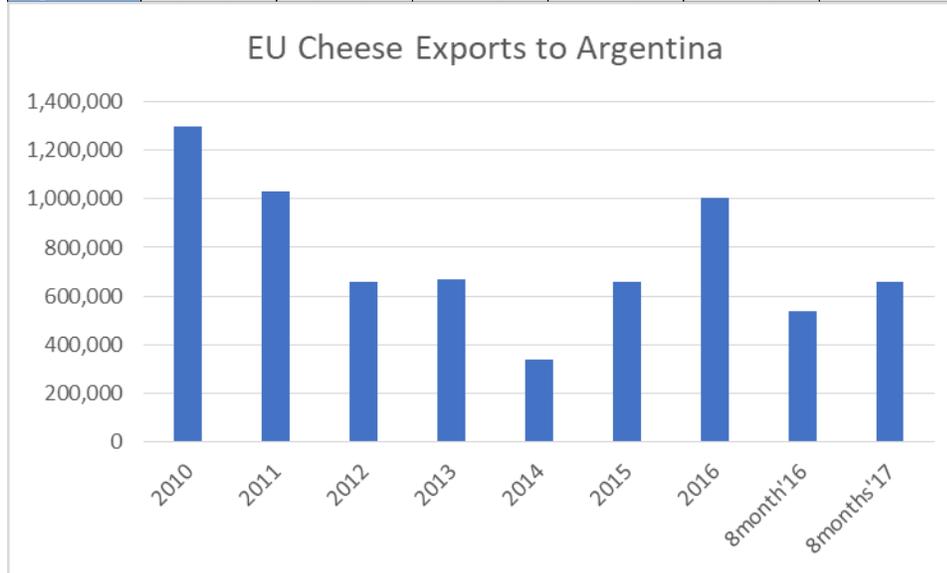
Threats

- Local cheese production is gaining ground
- The majority of the population has a limited budget: the price is therefore a key element in the purchase decision
- Local actors are tempted to reproduce French cheeses. This is the case of “tipo” or me-toos.

Argentina

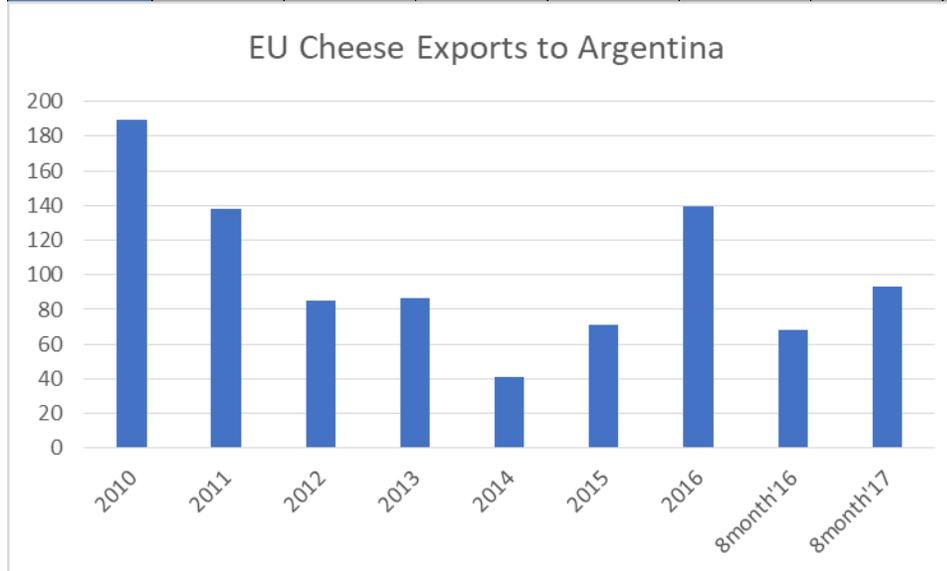
Exports of European Cheese to Argentina (Value €)

	2010	2011	2012	2013	2014	2015	2016	8month'16	8months'17
Argentina	1,300,428	1,029,246	657,084	669,500	340,154	655,585	1,005,063	539,697	659,010



Exports of European Cheese to Argentina (Volume in 1000 tons)

	2010	2011	2012	2013	2014	2015	2016	8month'16	8month'17
Argentina	190	138	85	86	41	71	139	68	93



About the country

Production

2016

Argentine milk output for calendar year (CY) 2016 is estimated down to 10.39 million tons output (equivalent to 10.094 million liters). The revised production estimate represents a 10 percent decline from 2015. With very tight returns during the first half of 2016, dairy producers are in deep financial problems, worsened by the extreme floods that affected the main dairy basin.

An exceptionally strong “El Niño” in 2016 caused extensive floods in the main production areas in the provinces of Cordoba, Entre Rios, and Santa Fe. These floods along with a sharp increase in production costs and low farm gate prices during the first half of the year placed downward pressure on output. Even after the weather improved in August, an estimated 80 percent of dairy farms are still in a critical situation with lingering financial problems.

Due to high inflation (estimated at about 30 percent), and increased production costs, producers shifted from more intensive production schemes to more forage-based nutrition, which is less costly but results in lower yields per cow. Even with the correction of farm gate prices in June/July (currently US\$ 0.28 per lt.), many inefficient producers and those who suffered flood damage left production. It is estimated that at least 400 dairy farms closed this year. The adverse weather hit the most productive dairy provinces of Cordoba, Entre Rios, and Santa Fe. Producers in Buenos Aires province have been relatively unaffected by the recent weather patterns.

2017

Argentinean milk production in calendar year (CY) 2017 is projected to slightly increase to 10.6 million metric tons (MMT) equivalent to 10,296 million liters, roughly a 2 percent increase from CY 2016 estimated figures. After a devastating 2016, the Argentinean dairy sector is beginning to recover from one of the worst crises in the last 20 years. The 2017 forecast is based on recovering domestic prices along with expected standard weather conditions and sustained international prices.

Although the sector is expected to recover in 2017, they will face a number of difficulties due to the events of the prior year. The year 2016 resulted in significantly reduced competitiveness, lower domestic and foreign investment, and greater concentration in the dairy sector as a growing number of producers are forced to shut down. More than half of producers finance production by some degree. This year, state and private banks are expected to provide producers with attractive financing options in order to bolster productions. Producers are also expected to maintain use of rural credit cards from private banks to finance inputs.

The new government inherited an already deteriorated dairy sector and continues to make various requests from the sector for assistance. Producers continue to express displeasure with

the current exchange rate that provides little competitiveness in international markets. Moreover, they continue to seek assistance on expanding financing options, and correcting farm gate prices.

Local Consumption

Domestic consumption of dairy products in 2017 is forecast to grow only marginally, with most growth in fluid milk consumption. The Argentinean consumer is experiencing serious economic difficulties and lower purchasing power. Despite more affordable prices and special sales offered by companies, there is small margin for growth. Fluid milk in Argentina retails between US\$0.39 and \$1.10 per liter. 2017 fluid milk consumption is expected to grow 2 percent to 1.8 million tons, while consumption for cheese, butter, and milk powder are expected to grow marginally. Estimated cheese consumption for CY 2016 at 460 MT, down 9 per cent. 2016 dairy consumption fell about 7 percent to an estimated per capita consumption of 190 liters. Over 90 percent of the cheese production is consumed domestically, despite the loss of purchasing power suffered by the Argentinean consumers. 2017 consumption is estimated to grow and recover to 2015 figures.

Trade

Exports

Post estimates total dairy exports of main products (Fluid Milk, Dry Whole Milk Powder (DWMP), Dry Non Fat Powder (DNFP), Cheese and Butter) for CY2017 to increase by two percent to 212,000 MT. This increase is due primarily to growth in cheese, DWMP, and butter exports. The modest recovery in milk production and signs of recovery of international prices are lifting 2017 export prospects. The devaluation of the Argentinean peso in December restored some competitiveness to Argentine dairy exports, but still not enough for most producers.

Lower production in CY 2016 impacted exportable supplies significantly. Exports of DWMP fell 5 percent during the first 8 months of CY 2016 compared to the same period of CY 2015, while cheese exports fell about 7 percent despite the larger purchases made by Russia.

Last June, Argentina signed an agreement with Brazil to export DWMP and DNFP. Both the private sector and the Ministry of Agro-Industry were involved in this agreement, under which 4,300 tons will be shipped monthly during 2016-17, and 4,500 tons monthly during 2018.

Brazil is once again Argentina's best market with a share of 35 percent followed by Russia (12 percent), Algeria (10 percent), China (9 percent), and Venezuela (7 percent).

Cheese varieties exported during the first half of the year in are soft (52 percent), semi soft (26 percent), and hard (15 percent). Russia has appeared again as an important market for Argentina with increased purchases of semi soft varieties of cheese.

Imports

Dairy imports continue to be negligible; despite the change in import, policy after the Macri administration took office in December 2015. Based on information obtained from customs database, dairy imports for the period January through August 2016 totaled roughly 11 million USD.

Imported dairy products are usually ingredients used for food processing. Imported products from this past year included whey, modified whey, caseinates and milk albumin mainly from Germany and Netherlands.

Average Costs of Select Dairy Products

Competition and Local Brands

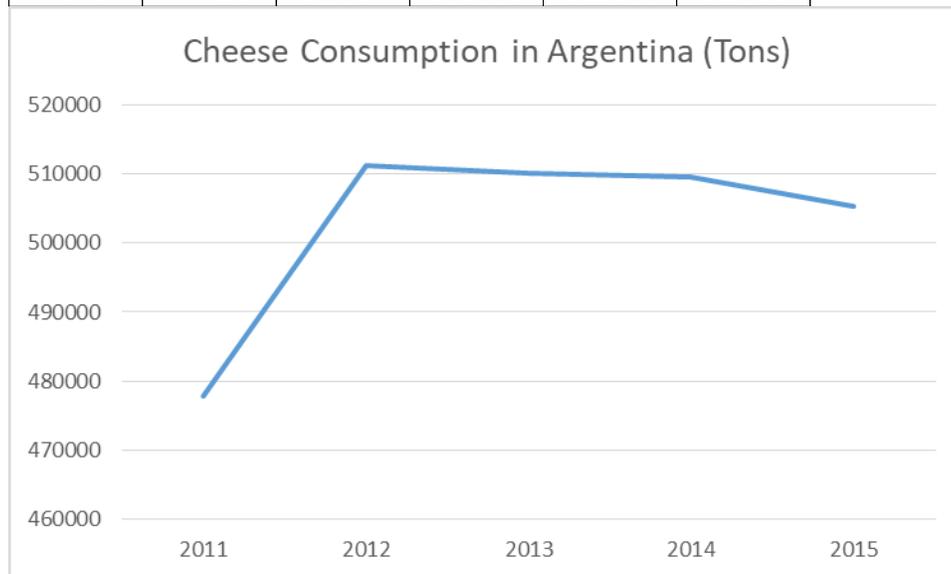
Local cheese production is 548,000 tons. Most imported cheeses come from Uruguay (71%), Brazil (11%) and France (8%) of which most are processed, grated or powdered cheeses. Soft-ripened and semi-soft cheeses are produced locally. National brands include Sancor, Matellone Hermanos, Sucesores de Alfredo Williner, Veronica SA and Molfino.

Demand

Consumption Habits

Average annual cheese consumption is at 12 kilos per year per

Argentina					
Year	2011	2012	2013	2014	2015
Tons	477856	511237	510223	509621	505260



Consumers Current Product Knowledge

Argentineans consume cheese essentially as an ingredient, during the preparation of meals: on toast or biscuits during breakfast or snacking, in the preparation of pizzas, sandwiches, Milanese Neapolitan, empanadas, pies, pasta, but also in the preparation of cheese-charcuterie boards, in cakes and desserts, etc. The main cheese consumed in Argentina is Cuartirolo, followed by Dambo, Mozzarella and Cremoso. Next is Port Salut and Reggianito.

Consumer Profile

Population of 43.8 million inhabitants (2016) with an average age of 34 years and a GDP per capita of 12.4K USD. Economic growth at 3% with an inflation rate of 22% and current unemployment is at 8.7% (declining). Five per cent of the population is of upper middle class status. Principle cities include Buenos Aires (capital), Cordoba, Mendoza and Rosario.

Consumption Trends

Strengths

- Recognized quality of French cheeses by Argentineans
- There is no real local competition currently to the uniqueness and flavour profiles of EU Cheeses.
- Wide variety of packaging and presentations (design, size and weight)
- EU Origin recognized by the consumer as a gourmet product and as "synonymous with cheese"
- Cheeses perceived as high-end, although this is not necessarily the case in the EU.

Weaknesses

- Higher price points
- Relatively short consumption date due to distance and nature of product
- The Argentinean consumer prefers mild unripened cheeses
- Niche products, so limited import volumes
- Special logistics (cold chain)
- Need for a real product communication policy: marketing approach for product positioning with consumers

Growth Potential

Growth potential is extremely high due to weak market penetration of EU imported cheeses.

Opportunities

- Argentinean market launching
- Gourmet curiosity of Argentines
- Market players who contribute to the promotion and discovery of these products include Carrefour, Casino, Savencia, Lactalis, importers and distributors of gourmet products
- Existence of a large number of EU Chefs and Restaurateurs in Argentina
- A large number of EU cheese varieties not yet present in Argentina: still limited supply
- One of the most important dairy consumers in South America
- Italian and Spanish cultural origins of Argentines

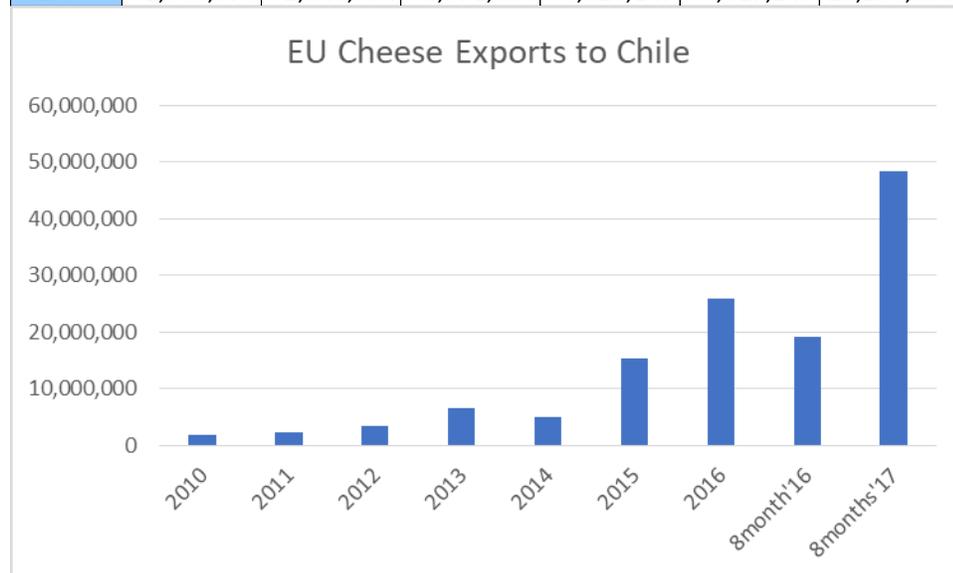
Threats

- Competition from foreign products and positive evolution of local production, which is gradually improving
- Consumption linked to the economic situation of the country: imported cheese is not a priority for households
- High inflation rate (almost 40% in 2016 but now at 22%) which makes the price of imported products come closer to national products: pressure from local cheese makers to limit imports of cheese?
- Return of a protectionist government after Mauricio MACRI's mandate, which limits food imports

Chile

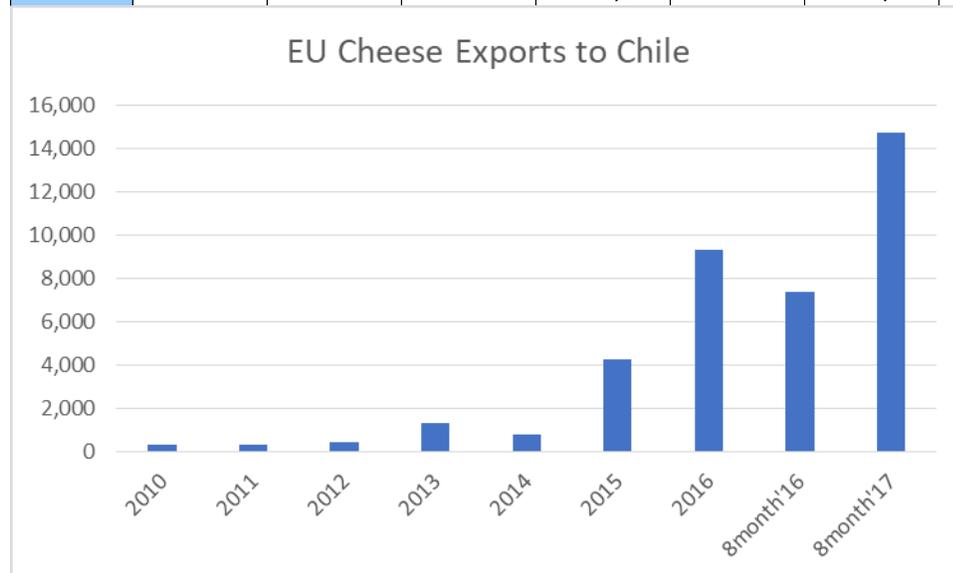
Exports of European Cheese to Chile (Value €)

	2010	2011	2012	2013	2014	2015	2016	8month'16	8months'17
Chile	1,909,378	2,346,704	3,371,834	6,626,147	4,927,240	15,258,554	25,882,295	19,157,715	48,397,001



Exports of European Cheese to Chile (Volume in 1000 tons)

	2010	2011	2012	2013	2014	2015	2016	8month'16	8month'17
Chile	311	321	424	1,311	798	4,259	9,289	7,396	14,736



Cheese consumption in Chile has been steadily increasing over the last five years: cheese varieties are growing and there is growth in sales of gourmet products. Stores encourage Chilean consumers to move towards cheese; this type of product makes it possible to show its adherence to a certain social class. It results in a proliferation of compulsive and systematic purchases of cheese, especially in supermarkets for less sought after cheeses. The most sold cheeses in Chile are Gouda, Chanco and Queso Crema cheese. These cheeses make up more than half of all cheeses consumed in Chile, and are in fact known to everyone. However, there is a gradual demand emerging for soft cheeses like brie or blue cheeses.

Production:

The dairy sector in Chile has 4,570 farms, 1.3 million hectares (ha) and produces 2.3 billion liters of milk a year using 436,000 dairy cows. The dairy sector employs 60,000 people directly and 100,000 people indirectly.

14 companies process 80% of the milk in the country while the rest is produced by a group of smaller companies. Chile's dairy production is concentrated in the southern regions of Los Lagos and Los Rios, where most dairy farms are located. However, processing facilities are located also in the Metropolitana, Biobio and Araucania regions.

During the last two years, dairy production has been conditioned by severe droughts, which reduced the amount of pasture production that ultimately reduced the overall feed availability. Furthermore, post sources indicate that domestic milk producer prices were low in 2015 (January – December) and 2016 and did not cover production costs in many cases.

These two factors forced the less efficient producers to sell dairy cows and dairy farms. Sources say that more efficient companies have bought pasture land from some of these producers in order to achieve economies of scale in milk production. The drought conditions prompted the use new technologies such as pasture irrigation in the southern regions of Los Lagos and Los Rios, which has not been used historically in dairy production, to secure pasture production and feed.

Post sources note that that New Zealand companies are making investments in Chile by buying dairy farms and increasing production while dairy cows genetics is coming mainly from the European Union and New Zealand given their similarities in dairy production feeding systems which are based in prairies instead of feedlots.

In 2017, weather conditions have improved in relation to the last two marketing years and water availability has not been a problem so far, therefore, feed availability is secured and there is enough of it in storage. Average milk production prices have increased over 2017. Because of the improvement in these two factors, and milk reception in Jan–Jul 2017 has increased by 3.7% over the same period in 2016 reaching 1.1 billion liters.

The current dairy trade balance for Chile is negative as imports are greater than exports. Chile increased dairy imports by 47% in volume and 70% in value in Jan-Aug 2017 over the same period in 2016. The main supplier of dairy imports is the United States with a 27% market share, reaching 18,726 MT and \$ 48.9 million in Jan - Aug 2017. New Zealand is the second top exporter of dairy products to Chile with a 27% market share, reaching 17,164 MT and \$ 60.4 million in Jan - Aug 2017.

Argentina is the third top exporter with a 24% market share and exporting 8,287 MT and \$ 30.9 million in Jan - Aug 2017.

From Jan-August, 2017, U.S. dairy exports grew 28% in value and 31% in volume over the same period in 2016. The top products exported to Chile are cheese (cream cheese and mozzarella) and non-fat dry milk, which have grown by 9% and 44% in Jan-Aug 2017 over 2016, respectively.

Table 2. Chile Import Statistics Volume (MT)								
Commodity: Dairy Products, Ex 04, 21, 17, 35								
Partner Country	Volume (MT)				Value (USD)			
	Jan -Aug 2016	Jan - Aug 2017	Variation (%)	Market Share (%)	Jan -Aug 2016	Jan - Aug 2017	Variation (%)	Market Share (%)
World	47,835	70,218	47%	100%	132,486,441	224,645,866	70%	100%
United States	14,290	18,726	31%	27%	38,233,774	48,904,654	28%	22%
New Zealand	9,883	17,164	74%	24%	26,621,964	60,402,629	127%	27%
Argentina	9,698	8,287	-15%	12%	28,250,151	30,934,304	10%	14%
Germany	4,161	7,644	84%	11%	10,250,461	24,627,493	140%	11%
Netherlands	1211	7,048	482%	10%	3,808,268	25,339,596	565%	11%
Peru	1861	2,339	26%	3%	2428122	3,090,505	27%	1%
Uruguay	1,591	1,554	-2%	2%	4,656,970	5,741,871	23%	3%
France	2402	1,102	-54%	2%	8014671	6,113,147	-24%	3%
Canada	0	1,095	-	2%	12643	2163831	17015%	1%
Brazil	666	981	47%	1%	2,383,140	3,520,423	48%	2%
Spain	549	798	45%	1%	2233134	3669866	64%	2%
Mexico	41	757	1746%	1%	139,797	2,047,005	1364%	1%
Others	1,482	2,723	84%	4%	5,453,346	8,090,542	48%	4%

Source: Chile Customs - Servicio Nacional de Aduana (Global Trade Atlas), 2017.

Competition and Local Brands

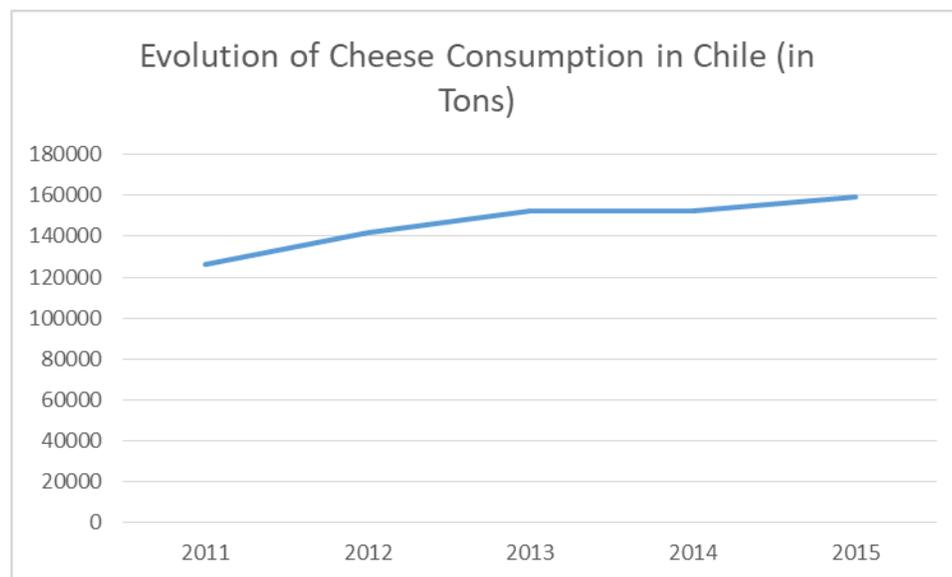
Competition from other imported cheeses including Gouda, spreadable cheeses and Mozzarella from the United States (30%), Argentina (21%) and New Zealand (16%). Some Gouda is produced locally. Local brands include Colun, Soprole and Watt's SA.

Demand

Consumption Habits

Current cheese consumption is 9.1 kilos per year per capita. Which has been growing since 2011. The evolution of consumption is shown below in tons per annum:

Chile					
Year	2011	2012	2013	2014	2015
Tons	126000	141750	152250	152250	159250



Consumers Current Product Knowledge

Chileans are traditional consumers so change must be progressive. They favor products like Brie, Roquefort, Camembert and are increasingly interested for light and healthy products. Culinary education is needed because Chileans are used to mild cheeses. Highlighting the product EU origin is well perceived.

Consumer Profile (information as of 2015)

Current population is 17.9 million inhabitants with an average age of 33. GDP per capita is 13,8K USD. The annual growth rate is at +1.9% with an inflation rate of 4.72%. Unemployment is at 6.2%. Upper Middle Class households represent 8%

of ABC levels and 16% of C2. Principal Cities include Santiago (Capital) and Valparaiso.

Strengths of EU Cheeses in Chile

- EU cheeses are very popular with consumers
- Popularity of "Made in EU"
- Innovative taste
- The majority of Chilean consumers indicate that EU cheese is good value for money.
- Purchases of EU cheeses is perceived as a "Culinary experience" and placing oneself in another social category.
- Controlled cold chain/logistics

Weaknesses of EU Cheeses in Chile

- Some French cheeses are considered too "strong" and the maturity of the Chilean market is far from that of EU for cheeses with pronounced flavors
- EU cheeses are considered expensive
- Difficulty in importing from EU with pasteurization standards
- Difficult and slow logistics of Chilean Health Services

Opportunities

- The consumption habits of Chileans are changing and EU cheese has a role to play in this quest for refinement.
- The Chilean consumer is looking for new flavors
- Potential for association with other products
- Recognition of health systems between Europe and Chile, which facilitates administrative procedures
- Cheeses are exempt from customs duties

Threats

- Chanco, Mantecoso and Gouda are national products that are difficult to detract even if the positioning is not the same
- Complexity of the Chilean market: very traditional market. Chileans are attached to brands they already know
- The majority of the population has a limited budget: the price is therefore a key element in the purchase decision
- A few EU dairy firms hold a virtual monopoly on refined EU cheeses.

- Local actors are tempted to reproduce French cheeses. This is the case of Quillayes with Brie.

ARTICLE 4: DESCRIPTION OF THE SERVICES

4.1 CONTENT OF THE SERVICES

IMPLEMENTATION OF A COLLECTIVE INFORMATION AND COMMUNICATION CAMPAIGN FOR EU CHEESE IN THIRD COUNTRIES BRAZIL, ARGENTINA & CHILE 2020-2022.

TARGET COUNTRIES

1. BRAZIL
2. ARGENTINA
3. CHILE

General Objectives

OBJECTIVE 1: INCREASE AWARENESS AMONGST BRAZILIAN, ARGENTINEAN AND CHILEAN FOODIES/FOOD LOVERS

A measurable increase in awareness of EU Cheeses amongst our targeted Food Lovers, as well as an increase in awareness of the key messages of quality surrounding these products. This raised awareness will be a tangible example of EU agricultural products of high standards, particularly in terms of their quality, taste, diversity and traditions.

OBJECTIVE 2: INCREASE DAIRY EXPORTS FROM THE EU TO BRAZIL, ARGENTINA & CHILE

A measurable increase in exports of European cheeses towards BRAZIL, ARGENTINA & CHILE

The proposed strategy aims to **rapidly increase the consumption of European cheeses in the target markets** by developing events, direct information campaigns at points of sale and information actions in targeted countries based on the following criteria:

1. Reinforce the image, knowledge and recognition of European cheese
2. Highlight the capabilities and ease of use of European cheese through a wide range of uses and opportunities for use.
3. Promote cheese which represents both European culture and a European heritage by asserting in each country:
 - **The specificity of cheese, a unique product** from European agriculture
 - **The practical and essential side** of cheese that adapts to a wide range of uses
 - **The natural and authentic nature of cheese**, an environmentally friendly product made from high-quality raw materials subject to high safety requirements.

Strategy of the Programme

- Address the targets through influencer channels
- Communicate to the target groups new information on the European cultural dimension of cheese which they may not always be aware of, with little knowledge of the excellent quality of cheese from European agriculture
- Among the influencers, communicate data on the unique, individual, and thus authentic European cheeses.

Main targets:

- a) Foodies in the target countries
- b) Consumers – in particular females aged 25 to 49, CSP + and CSP ++ (high revenue); living in the large cities of the target countries

Secondary targets:

- c) online and offline press (print, radio, TV, web ...), Chefs
- d) Influencers and bloggers as well as the main influencers on social networks because they are inherent in the current modes of communication.

MAIN MESSAGES TO BE COMMUNICATED

Cheese carries strong values that correspond to those the targets of the program seek and appreciate in all European products:

- Authenticity / Tradition
 - Diversity
 - Quality
 - Adaptability
-
- Cheese is very diverse. Its diversity constitutes a patrimony and inherent European culture.
 - Cheese can be consumed in a variety of ways in many occasions and circumstances
 - Cheese is a product adapted to modern living; it can be consumed at various times of the day and can/should be integrated to every dietary guideline.

The campaign relies on the four points cited above, each to be developed in every communication component.

TONE AND AREAS OF CREATIVE FOCUS

The creative direction shall be provided by CNIEL

As for the Visibility of origin, the EU imposes:

Mention of the origin in all information and promotional material should not be determined on product origin, instead:

1. The main message of the programme shall be a Union message and shall not focus on a specific origin.
2. Any mention of origin shall fulfil the following cumulative conditions: (a) it shall not amount to a restriction of the free movement of agricultural and food products in breach of Article 34 of the Treaty on the Functioning of the European Union; (b) it shall not encourage consumers to buy domestic goods solely by virtue of their origin and shall refer to the particular properties of the product rather than the sole origin; and (c) it shall complement the main Union message.
3. The main Union message of the programme shall not be obscured by material related to the origin of the product, such as pictures, colors, symbols or music. The mention of origin shall appear in a separate area from that devoted to the main Union message.
4. The mention of origin on information and promotional material shall be limited to visual material. No mention of the origin shall be made in audio material.

TONE: The agency is not obligated to adhere to any particular tone and can submit whatever proposal it deems adapted to the target. However, the tone chosen should be justified.

RESOURCING STRATEGY

- Raise awareness and educate the targets through events or other actions to show the essential nature of cheese as part of daily healthy balanced nutrition.
- Raise awareness among targets using inherent tools to develop a strategic and viral message.
- Raise awareness among the press and influencers

4.2 PERFORMANCE OF THE SERVICES

4.2.1. In order to allow the CNIEL to monitor the progress of the activities and compliance with the obligations arising from the co-financing by the European Union, the successful tenderer shall produce and attach to each of its invoices, during the entire term of the contract, within 30 days from the end of each quarter as from the time the contract takes effect:

- A “quarterly technical report”, to be drafted in French in accordance with the template that will be provided by the CNIEL, containing (i) a description of the activities planned

and carried out with justifications, as the case may be, for any discrepancy vis-à-vis the activities planned and (ii) copies of the materials and visual media used;

- A “quarterly financial report”, to be drafted in French in accordance with the template that will be provided by the CNIEL, breaking down the costs and/or expenses actually incurred by the successful tenderer per activities; and
- Supporting documentation for each of such costs and/or expenses and proof of their payment by the successful tenderer and in particular:
 - o (i) the invoices of the successful tenderer’s subcontractors to which shall be appended proof of payment of said invoices by the successful tenderer (copy of the successful tenderer’s bank statements),
 - o (ii) the invoices of the subcontractors of the successful tenderer’s subcontractors to which shall be appended proof of payment of said invoices by the successful tenderer’s subcontractors (copy of the bank statements of the successful tenderer’s subcontractors),
 - o (iii) If appropriate, the itemised timesheets of the successful tenderer’s operators (one timesheet per budget line) and of the operators of the successful tenderer’s subcontractors.

At the end of each 12-month period (Phase), the successful tenderer shall produce and attach to the last invoice, within 30 days from the end of the Phase:

- o A “annual technical report”, to be drafted in French in accordance with the template that will be provided by the CNIEL, containing (i) a description of the activities planned and carried out, with justifications, as the case may be, for any discrepancy vis-à-vis the activities planned and (ii) copies of the materials and visual media used;
- o A “annual financial report” to be drafted in French, in accordance with the template that will be provided by the CNIEL, containing (i) an expenditure reporting table per activity and (ii) a financial statement for reporting Phase.

At the end of the contract, the successful tenderer shall produce and attach to the last invoice, within 30 days from the end of the contract a “final technical report” to be drafted in French, in accordance with the template that will be provided by the CNIEL, containing (i) an overview of the activities carried out and the results of the actions and (ii) a summary to be published.

4.2.2. In addition, to allow the progress of the activities to be monitored, the successful tenderer shall submit, each action and/or deliverable to the prior written approval of the CNIEL within a reasonable time that will be defined by mutual agreement, before they are performed, produced and/or published.

ARTICLE 5: PRICE OF THE CONTRACT

Prices are all-inclusive. They are detailed in the deed of commitment per type of action proposed with the corresponding fees. These prices are expressed in euros and include all tax and other charges applicable to the services as well as all associated expenses.

The amount of the contract is 1.100.000 euros (one million one hundred thousand euros) excluding VAT/year (divided as follows: 600,000 euros/yr for the Brazilian market, 300,000 euros/yr for the Chilean market and 200,000 euros/yr for the Argentinean market.)

The total amount of the contract cannot under any circumstances exceed €1.100.000,00 excluding VAT/year, including the purchasing of space, evaluation, management charges and fees.

The amount of the agency's fees cannot exceed 15% of the total amount of the activities effectively done and/or coordinated, excluding the purchasing of space. The amount of the agency's fees for the purchasing of space cannot exceed 5% of the amount of the Space Purchasing budget effectively incurred.

ARTICLE: 6: INVOICING AND SETTLEMENT TERMS AND CONDITIONS

6.1 Invoicing terms

Unless otherwise agreed between the parties, the successful tenderer will invoice its fees and expenditures on a quarterly basis.

Each of the invoice shall in all cases be accompanied by all elements described in the article 4.2.1.

6.2 Payment terms

Subject to performance of all its obligations, the successful tenderer's invoices will be paid by the CNIEL within a period of 30 (thirty) days end of month from receipt thereof.

The invoices shall be sent to the following address:

CNIEL – *service comptabilité* (accounting department)

42 rue de Châteaudun

75 314 PARIS Cedex 09

France

ARTICLE 7: PERIOD OF THE CONTRACT

The period of the contract is three (3) years. The contract is not renewable.

The contract is subject to prior written co-financing authorization obtained from the European Union and will take effect on the first day of the month following the signature date of the contract to be concluded between the CNIEL and the European Commission.

ARTICLE 8: PLACE WHERE THE CONTRACT WILL BE PERFORMED

The services that are the subject of this contract shall be carried out in Brazil, Argentina and Chile (hereinafter the "Territory (ies)").

ARTICLE 9: OBLIGATIONS OF THE SUCCESSFUL TENDERER

The successful tenderer undertakes:

- To perform the contract in accordance with the regulations in force and in compliance with the best practices specific to the services that are the subject of the contract, particularly in accordance with the provisions governing co-financing set by regulation no. 2015/1831 of 7 October 2015 laying down rules for applying regulation no. 1144/2014 on information provision and promotion measures concerning agricultural products implemented in the internal market and in the third countries (appended hereto in Annexes 1 and 3);
- To ensure that the creations comply with the legislation applicable in all of the countries in which they are likely to be distributed and in particular, but not limited to, Article 4 of EU Regulation no. 1144/2014 and Articles 2 to 8 of implementing regulation no. 2015/1831 (appended hereto in Annexes 1 and 3);
- Not to disclose any information reported as being of a confidential nature about which it would have been aware in connection with the performance of the services under the contract, and which relates to the resources to be used for the performance of the contract. Where applicable, the successful tenderer must advise its subcontractors of the obligations of confidentiality incumbent on it for the performance of the contract. It must ensure that these obligations are complied with by its subcontractors. The information, documents or data already accessible to the public when they are brought to the knowledge of the parties are not covered by this obligation of confidentiality. The other information relating to the performance of the contract can only be passed on to third parties with the CNIEL's express agreement;

- Not to use, in any form whatsoever, the results obtained during the performance of the services under this contract for the product campaign of another State;
- Not to submit an application to benefit from Community or national aid for actions carried out for the campaign forming part of this contract;
- To indicate clearly and legibly on all materials - regardless of the medium thereof - that it will produce in respect of the contract, and in its media relations, that the European Union has been involved in financing the Programme and the Actions, on pain of not being eligible for the expenses incurred.

The successful tenderer also undertakes, unless otherwise instructed by the CNIEL, to reproduce on all materials - regardless of the medium thereof - that it will produce in respect of the contract the logos detailed below:

- Logo of the European Union (flag) plus the phrase:
- CAMPAIGN FINANCED WITH THE ASSISTANCE OF THE EUROPEAN UNION translated into the language of the target country / countries
- European "Enjoy, It's from Europe" logo
- Logo of the CNIEL



Downloading of the European logos and the charters:

http://ec.europa.eu/agriculture/promotion/procedure/enjoy-instructions_fr.htm

The "Enjoy! it's from Europe" slogan will be used in English. The Agency can use a translation of this slogan in the form of a footnote at the bottom of the visual material (advertisement, poster, etc.) GRAPHIC CHARTER:

http://ec.europa.eu/agriculture/promotion/procedure/enjoy-instructions_fr.htm

ARTICLE 10: SUBCONTRACTING

The successful tenderer may also call on sub-contractors provided that it first informs purchaser in writing by providing it with their name, address and registration number on the trade and companies registry and/or SIRET number.

The successful tenderer is responsible for paying all invoices of subcontractors that it has commissioned to implement the activities of the contract on behalf of purchaser. Purchaser may not be held liable for the successful tenderer's late payments to its subcontractors.

In the event of subcontracting, the successful tenderer shall be solely responsible for the performance of the subcontracted parts. In this regard, the failings of the subcontractors arising from non-compliance with their commitments or the cessation of activity shall be treated as failings of the successful tenderer.

The obligations incumbent on the successful tenderer in respect of this contract apply *de jure* to the subcontractors. The successful tenderer undertakes to advise them of said obligations.

ARTICLE 11: CHECKING THE PROPER PERFORMANCE OF THE SERVICES UNDER THE CONTRACT

The CNIEL reserves the right to have any type of check carried out during the performance of the contract to ensure that the services performed comply with the contractual requirements. It can either expedite checks on site or ask the successful tenderer to send it documents proving that the proposed actions have been carried out.

Should the CNIEL note a breach of the requirements of these specifications, it shall send the successful tenderer a formal demand to rectify it within a specific period. Once the period set has passed, the CNIEL can either decide to terminate the contract in accordance with the conditions of Article 15 or decide not to pay the sums corresponding to the actions that do not comply with these specifications.

Any proposed amendment to the actions must be notified by the successful tenderer and validated by the CNIEL.

The periodic reports (see Article 4.2.1) shall also be subject to verifications. The successful tenderer is obliged to carry out the corrections requested by the CNIEL, where applicable.

Checking the proper performance of the contract also obliges the successful tenderer to undertake to keep the records and other supporting documents proving the proper performance of the programme and the costs declared as acceptable, in accordance with the conditions laid down by Regulation no. 2015/1831 of 7 October 2015 laying down rules for applying regulation no. 1144/2014 on information provision and promotion measures concerning agricultural products implemented in the internal market and in the third countries.

Accordingly, the successful tenderer shall:

- open a specific bank account dedicated exclusively to the program. The successful tenderer undertakes to keep copies of all bank statements relating to said bank account during the entire term of the contract and, after its end, during a period to be indicated by the CNIEL;
- keep analytical accounting specific to the contract and separate from its general accounting allowing the revenue and expenditures relating to the performance of the contract to be identified, and to keep it available to the CNIEL (in full or by extracts) upon simple request. The

successful tenderer undertakes to archive said accounting during the entire term of the contract and, after its end, during a period to be indicated by the CNIEL.

Finally, the successful tenderer is reminded that checks, reviews and audits, in particular on the successful tenderer's premises, can be expedited by the CNIEL, the Commission, the European Court of Auditors (ECA), the European Anti-Fraud Office (OLAF) and/or any body, agent or expert appointed by them for the full period of the contract and six (6) years after the contract has ended.

ARTICLE 12: INTELLECTUAL PROPERTY

The successful tenderer assigns, on an exclusive basis, all of the rights or titles to intellectual property of any nature relating to the results, allowing the CNIEL to use them freely in France and abroad.

This assignment relates in particular to the work carried out both by the successful tenderer and by directly or indirectly associated persons under this contract (freelance writers, associated rights of performers, right to reproduce the image of models and persons represented, etc.).

Ownership is transferred to the CNIEL as the services scheduled in the contract are carried out, subject to the CNIEL paying for them.

The assigned rights include, but are not limited to:

The right to reproduce all or part of the creations on any medium, particularly analogue or digital, in any forms and formats known or anticipated on the date that the contract is signed or subsequently discovered,

- The right to reproduce all or part of the creations by any processes (known or anticipated on the date that the contract is signed or subsequently discovered and contemplated),
- The right to adapt all or part of the creations in all formats and to translate all or part of them into any languages,
- The rights to distribute, lease, loan, make freely available and sell for any marketing, internal or external communication operation and any other means of using the creations falling within the activity of the CNIEL.

The media and processes include in particular any hard copy, computer or digital medium, any means of communication, direct or indirect, via space or land, by satellite, cable or radio waves, and any wired or wireless network, including the Internet in particular.

This assignment is valid for the legal period of protection of intellectual property rights, including any legal extension, regardless of the reason therefor, and on a worldwide basis. It includes the

possibility for the CNIEL and the European Union to benefit from all of the rights to use the results of the actions that are the subject of this contract.

The successful tenderer shall also transfer to the CNIEL title to all physical media containing the works.

ARTICLE 13: INSURANCES

The successful tenderer represents and warrants that its professional public liability is insured with a creditworthy insurance company and that said insurance covers all its services and/or the contract and persons involved, directly and/or indirectly, in carrying out and/or the implementing the contract.

ARTICLE 14: TERMINATION

14.1 Termination of the contract in full by the Parties

Should one of the Parties breach any one of the obligations provided under the contract, the other Party(ies) may, after formal notice sent by recorded delivery letter with acknowledgement of receipt to remedy the recorded breach(es) which has/have not been remedied in full or in part within the thirty (30) days of the receipt thereof, terminate, in full, the contract without other formality, without prejudice to any damages which might be owed.

14.2 Termination of the contract in full or in part by CNIEL

The CNIEL may also terminate this contract at any time and without the successful tenderer being entitled to any indemnity and/or compensation other than:

- the reimbursement, on presentation of justifying documents, of all the expenditures and expenses incurred by the successful tenderer,
- the payment of the remuneration of the successful tenderer for the activities carried out,

until the date of the termination or of its operative event (where the successful tenderer has failed to inform CNIEL of said operative event in the cases provided for in paragraphs a) and b) mentioned below), in the following cases:

- a) When the successful tenderer, during the implementation of this Contract, is placed in one of the situations mentioned in Articles 45, 46 and 48 of the order No. 2015-899 of 23 July 2015 relating to procurement contracts;

- b) When administration proceedings (Articles L. 631-1 et seq. of the French Commercial Code (Code de commerce)), compulsory liquidation proceedings (articles L. 640-1 et seq. of the French Commercial Code) or a like measure provided for under a foreign law is commenced against the successful tenderer and subject to the public policy provisions applicable to such proceedings;
- c) When CHAFEA terminates the Grant agreement regardless of the reason for said termination.
- d) In the event the public authorities fail to extend or call into question the extension of the inter-branch agreement entered into between the bodies that form the CNIEL setting the amount of the inter-trade contribution.

ARTICLE 16: DISPUTES AND CONFLICTS

The parties shall endeavour to settle amicably any disputes and conflicts which might arise during the performance of this contract. If the parties are unable to reach an amicable resolution, suit shall be brought before the Paris Regional Court (Tribunal de grande instance), which shall have sole jurisdiction.

Signed in two original copies*

In..... on.....

*Signature and stamp of the successful tenderer preceded by the words "read and approved" ("lu et approuvé")

Appendix 1 - (EU) Regulation no. 1144/2014 of 22 October 2014

https://eur-lex.europa.eu/legal-content/en/TXT/?uri=OJ%3AJOL_2014_317_R_0004

Appendix 2 - Delegated (EU) Regulation no. 3025/1829 of 23 April 2015

<https://eur-lex.europa.eu/legal-content/EN/TXT/PDF/?uri=CELEX:32015R1829&from=EN>

Appendix 3 - Implementing (EU) Regulation no. 2015/1831 of 7 October 2015

https://eur-lex.europa.eu/legal-content/en/TXT/?uri=uriserv:OJ.L_.2015.266.01.0014.01.ENG