



Brussels,

## STUDY ON "THE COMPETITIVENES OF EUROPEAN WINES"

### Evaluation Sheet

Concerning these criteria, the evaluation report is :	Unaccep- table	Poor	Satisfac- tory	Good	Excel- lent
<b>1. Meeting the needs:</b> Does the study adequately address the information needs of the commissioning body and fit the terms of reference?					X
<b>2. Relevant scope:</b> Are the necessary policy instruments represented and is the product and geographical coverage as well as time scope sufficient?					X
<b>3. Defensible design:</b> Is the applied methodology appropriate and adequate to ensure a clear and credible result?				X	
<b>4. Reliable data:</b> To what extent is the selected quantitative and qualitative information adequate?				X	
<b>5. Sound analysis:</b> Is the quantitative and qualitative information appropriately and systematically analysed and have the respective tasks been correctly fulfilled?				X	
<b>6. Validity of the conclusions:</b> Does the report provide clear conclusions? Are the conclusions based on credible information?				X	
<b>7. Clearly reported:</b> Does the report clearly describe the problem, the procedures and findings, so that information provided can easily be understood?				X	
<b>Taking into account the contextual constraints of the study, the overall quality rating of the report is:</b>				X	

## JUSTIFICATION FOR THE EVALUATION

**1. Meeting the needs:** The contractor has fully met the aims identified in the Terms of Reference (ToR). The outcomes of the analyses, the information gathered and the conclusions of the study can be used in the current and upcoming debates on the situation of the wine sector and market(s) at EU and global level, especially in what concerns the competitiveness vis-à-vis third countries. So, the study is very useful and relevant. The cooperation with the contractor during the whole period of the study was optimal.

**2. Relevant scope:** The product, geographic, economic actors and time scopes of the study are very well covered. More case studies than required in the tender specifications were undertaken, and the choice of the two extra ones (Japan and Denmark) was well justified. The conduction of the seven case-studies, in particular the four in third countries of a significant size (USA, Russia, China and Japan), deserves a special appraisal given the degree of difficulty involved and the very satisfactory results.

**3. Defensible design:** The methodology(ies) used were considered appropriate having into account the objectives set for the study. While the analysis of the past development of the competitiveness of EU wines relied strongly on quantitative data, the analysis of the key factors of competitiveness and most of the scenario techniques applied in the last part of the study in order to develop a prospective view of the situation up to 2025 relied on qualitative data. The results obtained with this mixed approach provided complex but appropriate and useful outcome, given also the complexity involved in analysing markets for a differentiated product such as wine.

**4. Reliable data:** The data collection allowed accumulating an enormous amount of data, which posed challenges for its further use in the analysis and for deriving the conclusions. On the one hand all the information collected from the literature review, and on the other hand all secondary data obtained from public and private databases and via the 72 in-depth interviews carried out within the context of the seven case studies. This process was carried out successfully, and mostly in relation to bulk wines it was challenging to have results from in-depth interviews but this is clearly mentioned in the report.

**5. Sound analysis:** The analysis undertaken in order to respond to the three themes was carried out in a rigorous way and was well developed. The different analytical tools used (statistical analyses, Porter's Diamond, structural analysis, etc..) were appropriate, analysing the qualitative and quantitative data in a valid manner. The limitations of each of the analytical approaches and tools are clearly presented and taken into account in the interpretation of the results.

**6. Validity of the conclusions:** The conclusions regarding the three main problem-areas to be addressed in order to improve the competitiveness of EU wines are established in a clear and detailed manner. The conclusions are well-structured, balanced, and prudent. The links between the analysis and the conclusions are well explained.

**7. Clearly reported:** The report is very clear, well presented with many figures and tables and easy to read and understand. The executive summary contains all the fundamental elements of the study presented in a concise and clear way.

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