

Specifications

DG ECFIN in-house training requiring external consultant

1 *Introduction*

DG ECFIN must organize a course consisting on “**International Trade**”.

2 *Subject*

Directorate General Economic and Financial Affairs is searching for an external trainer to deliver a course in English on “**International Trade**”.

2.1 **Objective**

The purpose of this course is to provide EC officials with:

- Provide officials with some practical knowledge / context on the major issues underpinning the globalisation debate.
- Develop an analytical framework so that officials will have a frame of reference in which to analyse the issues of international trade and globalisation.
- Provide a specialised bibliography for use in their day to day business.

2.2 **Language**

The training is to be given in English. All documentation and other material for participants must be made available in this language.

2.3. **Duration**

The training should correspond to a number of hours equivalent of 3 days.

2.4. **Venue**

The training should be carried out in the premises of the European Commission in Brussels.

2.5. **Number of participants**

The number of participants should ideally be 20-30 staff members. The course would be of particular interest for desk officers and economists dealing with international policy issues, with competitiveness and structural reform issues, as well as for other staff members in ECFIN with an interest in these topics.

2.6. **Content of the training**

The training shall be organised in a similar vein as an academic seminar. The training will be based on internationally reputed and well-known papers and/or textbooks in the area of international trade, international economic integration and the distributional implications of globalisation.

The following are example of topics that would ideally be included in the course:

- Review of the recent developments in international trade theory;

- Outline of the trade policy context. The economic underpinning of multilateral liberalization and other forms of trade liberalization (bilateral arrangements, free trade areas, regional trade arrangements).
- Can FTAs achieve outcomes similar to those of a multilateral trader round? If so, under which conditions?
- Trade defence instruments: what they are and when they are used?
- Growth effects of further trade liberalisation.
- Winners and losers. The re-distribution effects of trade liberalisation and globalisation.
- Intra-euro area aspects (effects of completion of single market, effect of the euro on trade, enlargement and trade...)

The instructor should have strong knowledge of the subject and appropriate pedagogical skills with proven corresponding academic qualifications and teaching experience. He/she should speak English fluently.

2.7. The deadlines for execution

A suitable date for arranging the course between June-July or September-December 2007 will be discussed with the selected contractor.

2.8. Preparation and implementation of the course

On the basis of the proposals made by the Contractor, the course will be fine tuned in cooperation with the departments concerned.

The contractor will be required to work:

- On his/her own premises, for planning and preparation.
- In Brussels, for the actual training sessions.

Phase 1 Preparation:

The contractor, in cooperation with the Commission departments concerned, will:

- Finalize the course programme
- Prepare the documentation (including a specialised bibliography) and the teaching materials to be used by the participants in the course. Preparatory reading materials will have to be made available at least two weeks before the delivery of the course so as to enable participants to prepare.

Phase 2 Implementation:

- Delivery of the course.
- Supplementary documentation for participants (e.g. copies of presentations used during the course, additional reading material where relevant, etc.) must be supplied.

3 Documents and information to be submitted with the dated and signed offer:

For the tender to be admissible the following documents have to be submitted:

- a) A dated and signed cover letter.

- b) Price schedule (Annex 2), duly completed, dated and signed, in accordance with the specifications.
- c) A detailed description of the proposed work programme, clearly stating the content of the training planned.
- d) A brief overview of the teaching methods and suggested documentation planned in order to achieve the objectives.
- e) The curriculum vitae of the teacher(s), listing relevant experience, references, diplomas, degrees and range of languages and further documentation demonstrating the professional capability of the tenderer .
- f) Standard form (Annex 3) concerning the exclusion criteria, **duly signed by the tenderer.**
- g) Financial Identification Form.
- h) Legal Entity Form

The draft model contract (purchase order) in Annex 4 is attached for your information only and should not be returned to DG ECFIN. After the decision has been made regarding the award of contracts, DG ECFIN will draw up a complete purchase order for signature by the contracting parties.

4. Payment

See Article 4 "Request for Payment" and Article 5 "Provisions concerning payments" of the General Conditions of Contract (Annex 7). The invoice must be accompanied by all documentation mentioned in Section 2.8 above, in electronic format.

5. The tender must include:

- All the information and documents required by the authorising department for the appraisal of tenders on the basis of the award criteria set out at point 7;
- The price, in accordance with point 6.

In drawing up his bid, the tenderer should bear in mind the provisions of the standard contract attached to this invitation to tender (Annex 4). The submission of a bid implies acceptance of these provisions and no amendments shall be made to the standard contract.

6. Prices

- Prices must be quoted in euros.
- Prices must cover the cost of the above-mentioned two phases and all the expenses incurred by the Contractor in performing the general contract, including estimated travel and subsistence expenses which must be indicated separately.

This estimate should be based on Annex 2 and include any travel required to meet representatives of ECFIN. In any event, it should represent the maximum amount of travel and subsistence expenses payable for all the services provided.

Prices should be quoted free of all duties, taxes and duties, including VAT, as the Communities are exempt from such charges under Articles 3 and 4 of the Protocol on the Privileges and Immunities of the European Communities.

7. Selection procedure

7.1 Exclusion criteria (cf. Annex 3)

Tenderers shall be excluded from participation in a procurement procedure if they are in one of the cases of exclusion in accordance with Articles 93 and 94 of the Financial Regulation (Council Regulation 1605/2002 of 25/6/02) and Article 133 of the Implementing Regulation (Commission Regulation 2342/2005 of 23/12/05).

The proof of non exclusion has to be provided by the production of the standard form of the exclusion criteria, duly signed by the tenderer (Annex 3).

7.2 Award criteria

The contract will be awarded to the best value for money evaluated on the basis of the following criteria:

a) Price **(30%)**

b) The quality of the training offered in relation to the requirements and details set out in the specifications. In particular, quality will be assessed on the basis of:

- the outline of the proposed programme for the course (relevance of subjects covered, quality, topics covered, etc.) **(35%)**;
- the teaching method including the suggested documentation, the experience of the trainers and proposed teaching materials for participants **(35%)**;

Prices and qualities of the offers will be ranked and given a score (P_i = price score of offer i ; Q_i = quality score of offer i). As regards the price score, the offer with the best price will be assigned a score of 100 points and the other offers will be assigned a score proportional to the ratio between the best price and the price of the offer. As regards the quality score, the offer with the best quality, as assessed by the evaluators, will be assigned a score of 100 points; the other offers will be assigned a score proportional to the ratio between the qualitative note of the offer and the qualitative note of the best offer.

Offers must present a minimum quality level representing at least 50% of the offer with the best quality.

The tender will be awarded to the offer presenting the maximum global score $S_i = P_i * 30\% + Q_i * 70\%$.

8. Applicable law and jurisdiction

The Contract shall be governed by Belgian law and any dispute shall be brought before the courts of Brussels.

9. Penalties

See Article 15 "Liquidated Damages" of the General Conditions of Contract.

PRICE SCHEDULE

Prices must be firm and quoted in euros, free of VAT and other taxes, **but they should cover all expenses incurred by the contractor including the cost of travel and subsistence.**

Breakdown of costs	Cost Max: 7,000 € (seven thousand euros)	
	Base	EUR
Phase 1 : Preparation	1. Lump sum	
Phase 2 : Delivery: Implementation	2. Lump sum	
Documentation/material for participants	3. Lump sum	
Estimated travel and subsistence expenses	4. Lump sum	

Global Sum	1+2+3+4	
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Name:.....

Date:.....

Signature:.....

Declaration on exclusion criteria

The undersigned (for organizations/companies the agent legally permitted to represent the tenderer with respect to third parties and acting on behalf of the company or of the above-mentioned organization):

Business name of the company or of the organization (if applicable):

Official place of residence:

License number (if applicable):

VAT number (if applicable):

Criteria of exclusion for the participation in a procurement procedure:

Hereby the above mentioned organization/company/individual declares:

- a) is not in state of a bankruptcy or bankruptcy proceedings, is not having affairs administered by the courts, has not entered into agreement with creditors or suspended its business activities, is not the subject of proceedings concerning those matters or in any analogous situation arising from a similar procedure provided for in national legislation or regulations;
- b) is not the subject of conviction of an offence concerning their professional conduct by a judgment which has the force of res judicata;
- c) is not guilty or the subject of a grave professional misconduct proven by any means which the contracting authority can justify;
- d) has fulfilled its obligations relating to the payment of the Social Security contributions or obligations relating to the payment of its taxes in accordance with the legal provisions of the country in which he/she/it is established or the country of the contracting authority or those of the country where the contract is to be performed;
- e) is not the subject of a judgment which has the force of res judicata for fraud, corruption, involvement in a criminal organization or any other illegal activity undermining the financial interests of the Communities;
- f) is not in serious breach of contract for failure to comply with their contractual obligations, following another procurement or grant award procedure financed by the Community budget.;
- g) is not faced with a conflict of interest;
- h) is not guilty of misrepresentation in supplying the information required or has not failed to supply this information.

Administrative or financial penalties may be imposed by the Contracting Authority on Tenderers who are in one of the cases of exclusion provided for above, in accordance with Articles 93, 94 & 96 of the Financial Regulation (Council Regulation 1605/2002 of 25/6/02) and Article 133 of the Implementing Regulation (Commission Regulation 2342/2002 of 23/12/02).


Signature:

Date:

DRAFT

INVITATION TO TENDER No: AO/ECFIN/R1/07/03

Annex 4

	EUROPEAN COMMISSION	PURCHASE ORDER (to be mentioned in all correspondence)	Number of sheets	Sheet No	Date and reference of your quote
	Address	No	<i>(Name and address of Contractor)</i>		
DG and administrative unit:	Contractor code:				
	Country of origin:				
	Currency of payment: EUR				
Tel.:	Code country of origin/currency				
Fax:					
<p>This purchase contract is governed by the 2003 General Conditions published on the Internet at: http://europa.eu.int/comm/budget/other_main/low_value_contracts_en.htm [and by the specification sent on [date] attached to this document] This purchase order constitutes acceptance of the Contractor's quote submitted on [date] by [fax, e-mail, post] and is valid [for [number] calendar days from the date of issue] [only if the delivery/performance dates stipulated below are complied with]. By agreeing to this contract, the Contractor states that he is familiar with and accepts the 2003 General Conditions and waives all other terms of sale or performance of services.</p>					
DESCRIPTION OF THE GOODS OR SERVICES			UNIT	QUANTITY	PRICE in €
					UNIT PRICE TOTAL
			Pursuant to the provisions of Articles 3 and 4 of the Protocol on the Privileges and Immunities of the European Communities, the Commission is exempt from all taxes and dues, including value added tax, on payments due in respect of this Contract. [In Belgium, use of this Contract constitutes a request for VAT exemption. The invoice must include the following statement: "Commande destinée à l'usage officiel des Communautés Européennes, Exonération de la TVA; article 42 § 3,3 du code de la TVA".]		
			Packaging Insurance Transport Assembly VAT		
			TOTAL :		
Place of delivery/performance and/or Incoterm and opening hours:			Contractor's signature		
Delivery/performance dates: [from ... to ...] [date]			Name:		
Payment: 30 days from receipt of the invoice			Position:		
Contractor's bank account: [please complete]			Date:		
Acceptance of the quote by the Commission:					
Date of issue :					
Signature [name and position]:					
The request for payment shall be admissible only if the Contractor returns a signed copy of this purchase order with the invoice.					
This Contract shall be governed by [Belgian] law and any dispute shall be brought before the courts of [Brussels].					

FINANCIAL IDENTIFICATION

This information is to be stored in the Commission's accounting records for use in its payment procedures.
Commission staff carrying out such procedures will be able to consult it for this purpose.

<u>ACCOUNT HOLDER</u>	
NAME	<input style="width: 100%;" type="text"/>
ADDRESS	<input style="width: 100%;" type="text"/>
TOWN/CITY	<input style="width: 80%;" type="text"/> POSTCODE <input style="width: 20%;" type="text"/>
COUNTRY	<input style="width: 80%;" type="text"/> VAT NUMBER <input style="width: 20%;" type="text"/>
CONTACT PERSON	<input style="width: 50%;" type="text"/> <input style="width: 50%;" type="text"/>
TELEPHONE	<input style="width: 50%;" type="text"/> FAX <input style="width: 50%;" type="text"/>
E - MAIL	<input style="width: 100%;" type="text"/>

<u>BANK</u>	
BANK NAME	<input style="width: 100%;" type="text"/>
RANCH ADDRESS	<input style="width: 100%;" type="text"/>
TOWN/CITY	<input style="width: 80%;" type="text"/> POSTCODE <input style="width: 20%;" type="text"/>
SORT CODE	<input style="width: 10%;" type="text"/> <input style="width: 10%;" type="text"/> <input style="width: 10%;" type="text"/> ACCOUNT NUMBER <input style="width: 40%;" type="text"/>
IBAN	<input style="width: 100%;" type="text"/>

REMARKS :

<u>BANK STAMP + SIGNATURE OF BANK REPRESENTATIVE</u> (Both Obligatory)(1)

<u>DATE + SIGNATURE ACCOUNT HOLDER :</u> (Obligatory)

(1) The bank stamp and signature of its representative are not required if this form is accompanied by a copy of a bank statement. The signature of the account holder is obligatory in all cases.

LEGAL ENTITIES

This information is to be stored in the Commission's accounting records for use in its payment procedures.
Commission staff carrying out such procedures will be able to consult it for this purpose.

INDIVIDUAL

TITLE	<input type="text"/>																														
NAME	<input type="text"/>																														
FIRST NAME	<input type="text"/>																														
(NAME 2)	<input type="text"/>																														
(NAME 3)	<input type="text"/>																														
OFFICIAL ADDRESS	<input type="text"/>																														
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POSTAL CODE	<input type="text"/>					P.O. BOX	<input type="text"/>																								
TOWN/ CITY	<input type="text"/>																														
COUNTRY	<input type="text"/>																														
VAT NR	<input type="text"/>																														
IDENTITY CARD NUMBER	<input type="text"/>					O	<input type="text"/>																								
PASSPORT NUMBER	<input type="text"/>					O	<input type="text"/>																								
DATE OF BIRTH	D D	<input type="text"/>		M M	<input type="text"/>		Y Y Y Y	<input type="text"/>				PLACE OF BIRTH	<input type="text"/>																		
COUNTRY OF BIRTH	<input type="text"/>																									<input type="checkbox"/>					
PHONE	<input type="text"/>															FAX	<input type="text"/>														
E-MAIL	<input type="text"/>																														

IT IS PREFERABLE AND SUFFICIENT TO SEND US THE ABOVE SHEET DULY COMPLETED AND ACCOMPANIED BY A CLEAR COPY OF THE IDENTITY CARD OR PASSPORT

DATE AND SIGNATURE