

## **TENDER SPECIFICATIONS**

### **BROKER SERVICES for MEDICAL INSURANCE FOR EXPATS IN EU DELEGATIONS**

*Service contract*

### **NEGOTIATED PROCEDURE**

#### **1. INTRODUCTION**

The contracting authority is the European External Action Service («the EEAS») (hereinafter referred to as "contracting authority"), represented by the Head of Division.

These tender specifications and the tender submitted by the awardee of the contract will be annexed to the contract and therefore be binding on the contracting parties during the implementation of the contract.

In addition, the instructions as stipulated in the document called "Instructions applicable to negotiated procedure for (very)low and middle-value contracts", available at the following [link](#), are applicable to this tender unless otherwise mentioned in these tender specifications.

#### **2. SUBJECT OF THE CONTRACT**

The contractor must provide the human and material resources necessary to provide the services in the non-exhaustive list below:

##### **Broker services for medical insurance:**

- **preparing a market survey;**
- **drafting technical specifications in view of the launch of a procurement procedure for the conclusion of a health, accident group and repatriation insurance contract**

#### **3. SUBCONTRACTING**

Tenderers must give an indication of the tasks that they intend to subcontract and are required to identify all subcontractors whose share of the contract is above 10%.

The subcontractors whose share of the contract is above 10% must comply with the same exclusion and selection criteria on legal and regulatory capacity, economic and financial capacity and technical and professional capacity applicable to tenderers and shall present the documentary evidence.

## **4. ELIGIBILITY OF ECONOMIC OPERATORS**

### **4.1. Access to public procurement**

The applicable provisions on access to public procurement are those indicated at point 4.1 of the document called "Instructions applicable to negotiated procedure for (very) low and middle-value contracts".

### **4.2. Non-exclusion and selection of economic operators**

Tenderers shall provide a declaration on exclusion and selection criteria attached to these tender specifications dully filled in, signed and dated by the legally authorised representative.

The declaration on exclusion and selection criteria shall be provided by each member of the group in case of joint tenders and by an entity on whose capacity it intends to rely and by all identified subcontractors whose share of the contract is above 10%.

All the tenderers shall provide with their tenders the documents mentioned as supporting documents on exclusion and selection criteria in the declaration on their honour and in the "Tender form" annexed to these tender specifications.

The tenderers shall meet the selection criteria listed here below.

The economic operators are required to have the following:

#### **Authorisation to provide the services at the place of performance of the contract.**

Minimum capacity level required:

The tenderer shall be authorised to provide the services being subject to this contract at the place of performance of this contract. The relevant certificate must be valid on the date of the deadline for the submission of tenders.

Supporting document/evidence requested:

#### **Evidence on enrolment in a relevant professional or trade register.**

Before the signature of the contract, the validity of the certificate may be verified again.

##### ***4.2.1. Technical and professional capacity criteria***

Tenderers must prove the technical and professional capacity to perform this contract by meeting the following criterion:

#### **Previous contracts**

Minimum capacity level(s) required:

1. At least one contract related to the preparation and/or management of international health, accident and repatriation insurance schemes for expatriates during the last five calendar years.

Supporting document(s)/evidence requested:

1. Completed tender form, *section 4 Evidence on selection criteria*.
2. In order to meet the minimum capacity level required mentioned above, the tenderer must supply for each contract listed in the corresponding table of the tender form a client's reference letter relevant to contracts performed during the past five calendar years specifying whether the contract has been carried out in a professional manner in compliance with the contractual terms.

Contracts without reference letters shall not be included in the list of the contracts as they will not be accepted. The reference letters provided for the contracts which are not in the list will not be accepted either.

The criterion is applied to:

- The tenderer.
- In case of joint tender this selection criterion will be applied to the group as a whole.

## **5. EVALUATION OF TENDERS ON THE BASIS OF THE AWARD CRITERIA**

### **5.1. Technical compliance**

The tenderers shall provide the "Statement of compliance with the requirements in the procurement documents" (refer to the "Tender form") duly dated and signed in order to be considered technically compliant.

The technically compliant tenders are evaluated in order to award the contract to the tender offering the best price quality ratio. For this purpose, the tender will be evaluated technically and financially.

### **5.2. Technical tender**

The technical quality of the tenders will be evaluated on the basis of the documents provided by the tenderers in the technical tender with regard to the award criteria described in the "Tender form".

After the negotiation phase, if any, any tender not scoring the minimum quality threshold of 50 % for each criterion and 60% points for all the criteria combined will be eliminated.

### **5.3. Financial tender**

The prices for the tender must be tendered:

- in EUR;
- free of all duties, taxes and other charges, including VAT, as the EEAS is exempt from such charges under Articles 3 and 4 of the Protocol on the privileges and immunities of the European Union;
- all inclusive. This means that, unless otherwise mentioned in these tender specifications, prices tendered for shall include all the costs to be incurred by the tenderers to fully implement the contract.

#### 5.4. Calculation of the overall score

The tender chosen will be that which offers the best price quality ratio among the technically compliant tenders, namely the tender obtaining the best overall score  $P_i$  calculated as follows where the weighting is [60]% for the quality and [40]% for the price:

$$P_i = T_i * [0.60] + F_i * [0.40]$$

$T_i$  = (technical quality score of the tender under consideration / score of the highest technical quality tender) \* 100

$F_i$  = (cheapest total price for the scenario / price of the scenario of the tender under consideration) \* 100

#### 5.5. Calculation of the total contract value

When awarding the contract, the contracting authority will calculate the maximum amount of the Contract by adding to the total amount of the successful financial tender an estimate for the price revision.

The resulting maximum amount of the Contract cannot be higher than 50,000 EUR,

If the resulting amount is higher, the tender will be considered unacceptable.

### 6. CONTENT OF THE TENDER

The tenderer shall duly complete and sign the "Tender form" annexed to these tender specifications and submit all the documents requested in it.

The contracting authority reserves the right to decide whether to request or not any missing documents not provided by the tenderers.

### 7. ANNEXES

Annex I: Technical specifications

Annex II: Tender form

- Section 1: Presentation of the tenderer
- Section 2: Legal entity form and Financial Identification Form
- Section 3: Declaration on honour on exclusion and selection criteria
- Section 4: Evidence on selection criteria
- Section 5 : Technical tender – description of the tender submitted
- Section 6: Technical tender: quality award criteria
- Section 7: Financial tender

- Section 8: Power of Attorney, commitment letter by an identified subcontractor, commitment letter by an entity on whose capacities is being relied

## **ANNEXES**

### **ANNEX I TECHNICAL SPECIFICATIONS**

The contracting authority intends to procure broker services. All the requirements in the following technical specifications are considered to be minimum requirements and therefore not subject to the negotiation, if any, unless specified for any particular aspects.

#### **Background**

The European Commission and the European External Action Service, the Diplomatic Service of the EU and responsible for the around 140 EU Delegations all over the world organise jointly a traineeship programme for Junior Professionals (JPDs). JPDs are young professionals holding the nationality of one of the EU Member States. They are posted for a period of 2 years in one of the EU Delegations all over the world, where they will have a diplomatic status and where they will also have their official residence. Hardship countries are excluded.

The EEAS plans to conclude a group sickness insurance for all JPDs and their dependants (+/- 100), covering:

- Sickness and accident
- GP and specialist visits (up to a ceiling – to be defined)
- Medication
- Dental care (upon authorisation)
- Hospitalisation
- Repatriation for medical emergencies.

#### **Expected services:**

The contractor shall conduct the preparations of the procurement procedure to be launched in view of the conclusion of a group sickness insurance as described above.

In this relation, he shall:

- conduct a market survey;

The aim is to gain prior knowledge and understanding of the insurance market and to analyse the market conditions in order to adapt the selection criteria and fix the minimum requirements to be met by the future tenderers. They must be proportionate to the market, to what the economic operators are capable to offer, to the real needs and to what the evaluation committee is capable to evaluate.

- prepare technical specifications of the tender to be launched in view of the conclusion of a group sickness insurance and which will reflect the needs of the population of Junior Professionals in Delegations in terms of coverage in the event of sickness, hospitalisation or medical emergency repatriation at the place of the JPDs posting.

**Timeframe**

Within one week after the signature of the contract, a meeting will be organised between the contractor and the contracting authority to discuss the details of the expected services.

The contractor will report on the progress of the work on a weekly basis.

The above-mentioned services must be finalised and delivered not later than 2 months after the signature of the contract.

**ANNEX II  
TENDER FORM**

**Section 1  
Presentation of the tenderer  
*BROKER SERVICES FOR MEDICAL INSURANCE FOR EXPATS IN EU DELEGATIONS***

	Official name of legal entity	Main registration number	State of the legal entity's headquarters (legal persons) or of the domicile (natural persons) of the legal entity	Role and tasks which will be performed by this economic operator	Natural or legal persons that are members of the administrative, management or supervisory body of the economic operator		Natural or legal persons that have powers of representation, decision or control with regard to the economic operator		Natural and legal persons that are beneficial owners of the economic operator	
					Official name	Main registration number for legal persons	Official name	Main registration number for legal persons	Official name	Main registration number for legal persons
<b>Leader<sup>1</sup></b>										
<b>Member</b>										
<i>[insert as many rows as necessary]</i>										

<sup>1</sup> If the tender is submitted by an individual legal entity, the name of that legal entity shall be entered as 'Leader' (and all other lines shall be deleted). If the tender is submitted by a group of economic operators (see point 3.1 of the "Instructions applicable to negotiated procedure for (very)low and middle-value contracts"), add additional lines for the members of the group.



## CONTACT PERSON OF THE LEADER FOR THIS TENDER

<b>Name</b>	
<b>Position</b>	
<b>Address</b>	
<b>e-mail</b>	

The indicated e-mail address will be used to contact the candidate. It is the responsibility of the candidate to regularly consult the e-mails received.

## SUBCONTRACTORS

Indication of the proportion of the contract intended to subcontract: 10 %

<b>Name of legal entity of the subcontractor(s)</b> (Only subcontractors whose share of the contract is above 10 %)	<b>Estimated percentage of share of the contract</b>
<i>insert as many rows as necessary</i>	

For each subcontractor whose share of the contract is above 10%, the tenderer shall submit a letter of intent stating their willingness to provide the foreseen part of the tender and in line with the present tender specifications.

Name(s) and signature(s) of the legal representative(s) of the tenderer\*:

\*in case of joint tender, the form shall be signed by the legal representative of each member of the group as indicated above under "Tenderer".

Stamp, date and place

## **Section 2**

### **Legal entity form**

Please submit a signed Legal Entity Form with its supporting evidence. The form is available at

[https://commission.europa.eu/publications/legal-entities\\_en](https://commission.europa.eu/publications/legal-entities_en)

When the tenderer is a legal person, a legible copy of the notice of appointment of the persons authorised to represent the tenderer in dealings with third parties and in legal proceedings, or a copy of the publication of such appointment if the legislation which applies to the legal entity concerned requires such publication. Any delegation of this authorisation to another representative not indicated in the official appointment must be evidenced. When the tenderer is a natural person, a proof of registration on a professional or trade register or any other official document showing the registration number. The legally constituted consortium must present its own Legal Entity Form which is different from the Legal Entity Form of each individual member of the group;

### **Financial identification form**

Please submit a signed financial identification form and its supporting evidence. The form is available at

[https://commission.europa.eu/publications/financial-identification\\_en](https://commission.europa.eu/publications/financial-identification_en), (bank account file - BAF). Even in case of joint tenders, one form must be submitted;

### Section 3

#### Declaration on honour on exclusion criteria and selection criteria

The undersigned [*insert name of the signatory of this form*], representing:

<i>(only if the candidate is a natural person) himself or herself</i>	<i>(only if the candidate is a legal person) the following legal person:</i>
ID or passport number:  (‘the person’)	Full official name: Official legal form: Statutory registration number: Full official address: VAT registration number:  (‘the person’)

The person is not required to submit the declaration on exclusion criteria if the same declaration has already been submitted for the purposes of another award procedure of the same contracting authority<sup>2</sup>, provided the situation has not changed, and that the time that has elapsed since the issuing date of the declaration does not exceed one year.

In this case, the signatory declares that the person has already provided the same declaration on exclusion criteria for a previous procedure and confirms that there has been no change in its situation:

Date of the declaration	Full reference to previous procedure

#### I – Situation of exclusion concerning the person

(1) declares that the above-mentioned person is in one of the following situations:	YES	NO
(a) it is bankrupt, subject to insolvency or winding-up procedures, its assets are being administered by a liquidator or by a court, it is in an arrangement with creditors, its business activities are suspended or it is in any analogous situation arising from a similar procedure provided for under Union or national law;	<input type="checkbox"/>	<input type="checkbox"/>
(b) it has been established by a final judgement or a final administrative decision that the person is in breach of its obligations relating to the payment of taxes or social security contributions in accordance with the applicable law;	<input type="checkbox"/>	<input type="checkbox"/>
(c) it has been established by a final judgement or a final administrative decision that the person is guilty of grave professional misconduct by having violated applicable laws or regulations or ethical standards of the profession to which the person belongs, or by having engaged in any wrongful conduct which has an		

<sup>2</sup> The same EU institution, agency, body or office.

impact on its professional credibility where such conduct denotes wrongful intent or gross negligence, including, in particular, any of the following:		
(i) fraudulently or negligently misrepresenting information required for the verification of the absence of grounds for exclusion or the fulfilment of eligibility selection criteria or in the performance of a contract or an agreement;	<input type="checkbox"/>	<input type="checkbox"/>
(ii) entering into agreement with other persons with the aim of distorting competition;	<input type="checkbox"/>	<input type="checkbox"/>
(iii) violating intellectual property rights;	<input type="checkbox"/>	<input type="checkbox"/>
(iv) attempting to influence the decision-making process of the contracting authority during the award procedure;	<input type="checkbox"/>	<input type="checkbox"/>
(v) attempting to obtain confidential information that may confer upon it undue advantages in the award procedure;	<input type="checkbox"/>	<input type="checkbox"/>
(d) it has been established by a final judgement that the person is guilty of the following:		
(i) fraud, within the meaning of Article 3 of Directive (EU) 2017/1371 and Article 1 of the Convention on the protection of the European Communities' financial interests, drawn up by the Council Act of 26 July 1995;	<input type="checkbox"/>	<input type="checkbox"/>
(ii) corruption, as defined in Article 4(2) of Directive (EU) 2017/1371 or active corruption within the meaning of Article 3 of the Convention on the fight against corruption involving officials of the European Communities or officials of Member States of the European Union, drawn up by the Council Act of 26 May 1997, or conduct referred to in Article 2(1) of Council Framework Decision 2003/568/JHA, as well as corruption as defined in the other applicable laws;	<input type="checkbox"/>	<input type="checkbox"/>
(iii) conduct related to a criminal organisation, as referred to in Article 2 of Council Framework Decision 2008/841/JHA;	<input type="checkbox"/>	<input type="checkbox"/>
(iv) money laundering or terrorist financing, within the meaning of Article 1(3), (4) and (5) of Directive (EU) 2015/849 of the European Parliament and of the Council;	<input type="checkbox"/>	<input type="checkbox"/>
(v) terrorist offences or offences linked to terrorist activities, as defined in Articles 1 and 3 of Council Framework Decision 2002/475/JHA, respectively, or inciting, aiding, abetting or attempting to commit such offences, as referred to in Article 4 of that Decision;	<input type="checkbox"/>	<input type="checkbox"/>
(vi) child labour or other offences concerning trafficking in human beings as referred to in Article 2 of Directive 2011/36/EU of the European Parliament and of the Council;	<input type="checkbox"/>	<input type="checkbox"/>
(e) it has shown significant deficiencies in complying with the main obligations in the performance of a contract or an agreement financed by the Union's budget, which has led to its early termination or to the application of liquidated damages or other contractual penalties, or which has been discovered following checks, audits or investigations by a contracting authority, the European Anti-Fraud Office (OLAF) or the Court of Auditors;	<input type="checkbox"/>	<input type="checkbox"/>

(f) it has been established by a final judgment or final administrative decision that the person has committed an irregularity within the meaning of Article 1(2) of Council Regulation (EC, Euratom) No 2988/95;	<input type="checkbox"/>	<input type="checkbox"/>
(g) it has been established by a final judgment or final administrative decision that the person has created an entity under a different jurisdiction with the intent to circumvent fiscal, social or any other legal obligations in the jurisdiction of its registered office, central administration or principal place of business.	<input type="checkbox"/>	<input type="checkbox"/>
(h) <i>(only for legal persons)</i> it has been established by a final judgment or final administrative decision that the person has been created with the intent provided for in point (g).	<input type="checkbox"/>	<input type="checkbox"/>
(i) for the situations referred to in points (c) to (h) above the person is subject to: <ul style="list-style-type: none"> <li>i. facts established in the context of audits or investigations carried out by the European Public Prosecutor's Office after its establishment, the Court of Auditors, the European Anti-Fraud Office (OLAF) or the internal auditor, or any other check, audit or control performed under the responsibility of an authorising officer of an EU institution, of a European office or of an EU agency or body;</li> <li>ii. non-final judgements or non-final administrative decisions which may include disciplinary measures taken by the competent supervisory body responsible for the verification of the application of standards of professional ethics;</li> <li>iii. facts referred to in decisions of entities or persons being entrusted with EU budget implementation tasks;</li> <li>iv. information transmitted by Member States implementing Union funds;</li> <li>v. decisions of the Commission relating to the infringement of Union competition law or of a national competent authority relating to the infringement of Union or national competition law; or</li> <li>vi. decisions of exclusion by an authorising officer of an EU institution, of a European office or of an EU agency or body.</li> </ul>	<input type="checkbox"/>	<input type="checkbox"/>

## II – SITUATIONS OF EXCLUSION CONCERNING NATURAL OR LEGAL PERSONS WITH POWER OF REPRESENTATION, DECISION-MAKING OR CONTROL OVER THE LEGAL PERSON AND BENEFICIAL OWNERS

### *Not applicable to natural persons, Member States and local authorities*

(2) declares that a natural or legal person who is a member of the administrative, management or supervisory body of the above-mentioned legal person, or who has powers of representation, decision or control with regard to the above-mentioned legal person (this covers e.g. company directors, members of management or supervisory bodies, and cases where one natural or legal person holds a majority of shares), or a	YES	NO	N/A
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beneficial owner of the person (as referred to in point 6 of article 3 of Directive (EU) No 2015/849) is in one of the following situations:			
Situation (c) above (grave professional misconduct)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Situation (d) above (fraud, corruption or other criminal offence)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Situation (e) above (significant deficiencies in performance of a contract )	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Situation (f) above (irregularity)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Situation (g) above (creation of an entity with the intent to circumvent legal obligations)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Situation (h) above (person created with the intent to circumvent legal obligations)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Situation (i) above	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

### III – SITUATIONS OF EXCLUSION CONCERNING NATURAL OR LEGAL PERSONS ASSUMING UNLIMITED LIABILITY FOR THE DEBTS OF THE LEGAL PERSON

(3) declares that a natural or legal person that assumes unlimited liability for the debts of the above-mentioned legal person is in one of the following situations:	YES	NO	N/A
Situation (a) above (bankruptcy)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Situation (b) above (breach in payment of taxes or social security contributions)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

### IV – GROUNDS FOR REJECTION FROM THIS PROCEDURE

(4) declares that the above-mentioned person:	YES	NO
Was previously involved in the preparation of the procurement documents used in this award procedure, where this entailed a breach of the principle of equality of treatment including distortion of competition that cannot be remedied otherwise.	<input type="checkbox"/>	<input type="checkbox"/>

### V – REMEDIAL MEASURES

If the person declares one of the situations of exclusion listed above, it must indicate measures it has taken to remedy the exclusion situation, thus demonstrating its reliability. This may include e.g. technical, organisational and personnel measures to prevent further occurrence, compensation of damage or payment of fines or of any taxes or social security contributions. The relevant documentary evidence which illustrates the remedial measures taken must be provided in annex to this declaration. This does not apply for situations referred in point (d) of this declaration.

### VI – EVIDENCE UPON REQUEST

Upon request and within the time limit set by the contracting authority the person must provide information on natural or legal persons that are members of the administrative, management or

supervisory body or that have powers of representation, decision or control, including legal and natural persons within the ownership and control structure and beneficial owners.

It must also provide the following evidence concerning the person itself and the natural or legal persons on whose capacity the person intends to rely, or a subcontractor and concerning the natural or legal persons which assume unlimited liability for the debts of the person:

For situations described in (a), (c), (d), (f), (g) and (h), production of a recent extract from the judicial record is required or, failing that, an equivalent document recently issued by a judicial or administrative authority in the country of establishment of the person showing that those requirements are satisfied.

For the situation described in point (b), production of recent certificates issued by the competent authorities of the State concerned are required. These documents must provide evidence covering all taxes and social security contributions for which the person is liable, including for example, VAT, income tax (natural persons only), company tax (legal persons only) and social security contributions. Where any document described above is not issued in the country concerned, it may be replaced by a sworn statement made before a judicial authority or notary or, failing that, a solemn statement made before an administrative authority or a qualified professional body in its country of establishment.

The person is not required to submit the evidence if it has already been submitted for another award procedure of the same contracting authority<sup>3</sup>. The documents must have been issued no more than one year before the date of their request by the contracting authority and must still be valid at that date.

The signatory declares that the person has already provided the documentary evidence for a previous procedure and confirms that there has been no change in its situation:

Document	Full reference to previous procedure
<i>Insert as many lines as necessary.</i>	

## VII – SELECTION CRITERIA

(1) declares that the above-mentioned person complies with the selection criteria applicable to it individually as provided in the tender specifications:	YES	NO	N/A
(a) It has the legal and regulatory capacity to pursue the professional activity needed for performing the contract as required in section 5.2.1 of the tender specifications;	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
(b) It fulfills the applicable economic and financial criteria indicated in section 5.2.2 of the tender specifications;	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
(c) It fulfills the applicable technical and professional criteria indicated in section 5.2.3 of the tender specifications.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

<sup>3</sup> The same institution or agency.

(2) if the above-mentioned person is the <b>sole tenderer</b> or the <b>leader in case of joint tender</b> , declares that:	YES	NO	N/A
(d) the tenderer, including all members of the group in case of joint tender and including subcontractors if applicable, complies with all the selection criteria for which a consolidated assessment will be made as provided in the tender specifications.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

## VIII – EVIDENCE FOR SELECTION

The signatory declares that the above-mentioned person is able to provide the necessary supporting documents listed in the relevant sections of the tender specifications and which are not available electronically upon request and without delay.

The person is not required to submit the evidence if it has already been submitted for another procurement procedure of the same contracting authority<sup>4</sup>. The documents must have been issued no more than one year before the date of their request by the contracting authority and must still be valid at that date.

The signatory declares that the person has already provided the documentary evidence for a previous procedure and confirms that there has been no change in its situation:

Document	Full reference to previous procedure
<i>Insert as many lines as necessary.</i>	

***The above-mentioned person must immediately inform the contracting authority of any changes in the situations as declared.***

***The above-mentioned person may be subject to rejection from this procedure and to administrative sanctions (exclusion or financial penalty) if any of the declarations or information provided as a condition for participating in this procedure prove to be false.***

Full name

Date

Signature

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<sup>4</sup> The same institution of agency.



## Section 4

### Evidence on selection criteria

If the supporting documents on the selection criteria are requested (see point 5.2 of the tender specifications), the tenderers shall complete the forms and/or submit the supporting documents listed here below.

#### *Legal and regulatory capacity criteria*

- a) Evidence on enrolment in a relevant professional or trade register, except for international organisations, proving that it is authorised to perform the contract in Belgium.

#### *Technical and professional capacity criteria*

- a) A completed list of the service contracts

Name of the client	Subject of the contract	Duration		Reference letters attached?
		Start date	End date or ongoing	
				Yes/No
				Yes/No
				Yes/No
[insert as many rows as necessary]				Yes/No

- b) Clients' reference letters in the fields related to the services specifying whether the contract has been carried out in a professional manner in compliance with the contractual terms.

- c) A completed declaration on the manpower employed at the deadline for submission of tenders.

	At the date of deadline for submission of tenders
Manpower employed in the field related to broker services	

- a) CVs of members of tenderer's personnel who will perform broker services.

*The following annexes shall be completed by the tenderer and send as part of its tender. The annexes shall be completed with tenderer's replies. The tenderers shall insert in the form itself the specific references to all the documents included in its tender.*

## **Section 5**

### **Technical tender**

#### **Description of the tender submitted**

**The tenderer will explain in detail their tender including detailing the tasks which will be performed by each member of a joint tender and each subcontractor whose share of the contract is higher than 10%]**

*Insert your reply here and add additional space if necessary*

## Section 6

### Technical tender

#### Technical award criteria

No	Criteria	Max. number points
1	<p><b><u>Organisation for the performance of the services</u></b></p> <p>how the roles of the proposed team (in case of joint tenders, including subcontractors if applicable) are distributed for each task</p>	(XX points – minimum threshold 50%)
	<p><i>Insert your reply or a specific reference to the attached document. You may add additional space if necessary.</i></p>	

No	Criteria	Max. number points
2	<p><b><u>Quality control measures.</u></b></p> <p>This criterion will enable to assess of the quality control system applied to the service foreseen in these tender specifications concerning the quality of and continuity of the service in case of absence of the members of the team.</p> <p>The quality system shall be detailed in the tender and specific to the services at hand; a generic quality system will result in a low score</p>	(XX points – minimum threshold 50%)
	<p><i><b>Insert your reply or a specific reference to the attached document. You may add additional space if necessary.</b></i></p>	

## Section 7

### Financial tender

#### Annex A

##### Price over the duration of the contract in EUR

Item	Description	Type of unit	Number of units over the maximum duration of the contract	Unit price in EUR	Total price in EUR
1	2	3	4	5	6 = 4 x 5
A	<i>[please fill in]</i>	<i>[please fill in]</i>	<i>[please fill in]</i>		
B	<i>[please fill in]</i>	<i>[please fill in]</i>	<i>[please fill in]</i>		
C	<i>[please fill in]</i>	<i>[please fill in]</i>	<i>[please fill in]</i>		
D	<i>[please fill in]</i>	<i>[please fill in]</i>	<i>[please fill in]</i>		
....	<i>[please fill in]</i>	<i>[please fill in]</i>	<i>[please fill in]</i>		
<b>TOTAL</b>					

When filling in this table, tenderers shall fill in in column 5 the unit prices. Tenderers will carefully calculate the total in column 6. They will do so for each item, they will not add, suppress or modify any item.

**Name of tenderer:**

**Name of the legal representative of the tenderer:**

**Date:**

**Signature:**

**Name of tenderer (to be filled in case of a joint tender):**

**Name of the legal representative of the tenderer:**

**Date:**

**Signature:**

## Section 8

### Power of attorney

Public procurement procedure EEAS/2025/XX/00XX]

BROKER SERVICES for MEDICAL INSURANCE FOR EXPATS IN EU DELEGATIONS

#### **POWER OF ATTORNEY FROM GROUP MEMBERS TO THE GROUP LEADER AND ACCEPTANCE OF THE POWERS GRANTED BY THE GROUP LEADER**

The undersigned:

1. *[Insert name and surname of the signatory person of this document]*, with ID number *[complete]* [and VAT number *[complete]]*<sup>5</sup>, *[(group leader).]*<sup>6</sup> [having the legal capacity required to act on behalf of:

Company (**group leader**): *[complete with full official name]*

Official legal form: *[complete]*

Statutory Registration Number: *[complete]*

Registered address: *[complete with full official address]*

VAT Number: *[complete]]*<sup>7</sup>

2.<sup>8</sup> *[Insert name and surname of the signatory of this power of attorney]*, with ID number *[complete]* [and VAT number *[complete]]*<sup>9</sup>, *[(group member).]*<sup>10</sup> [having the legal capacity required to act on behalf of:

Company (**group member**): *[complete with full official name]*

Official legal form: *[complete]*

Statutory Registration Number: *[complete]*

Registered address: *[complete with full official address]*

VAT Number: *[complete]]*<sup>11</sup>

HEREBY AGREE TO THE FOLLOWING:

- 1) To submit a joint request to participate/tender as members of a group (the *Group*), led by the person identified in position 1 above as the *Group leader*, in accordance with the

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<sup>5</sup> For natural persons, if applicable.

<sup>6</sup> For natural persons.

<sup>7</sup> For legal persons.

<sup>8</sup> Add as many lines as members of the group.

<sup>9</sup> For natural persons, if applicable.

<sup>10</sup> For natural persons.

<sup>11</sup> For legal persons.

conditions specified in the procurement documents and the terms specified in the request to participate/tender to which this Power of Attorney is attached.

- 2) The *Group members* grant to the *Group leader* all the necessary powers to act on their behalf in the submission of the request to participate/tender. The *Group leader* shall submit the tender on behalf of all the *Group members* and indicate the name and e-mail address of an individual within the *Group leader* who will act as single point of contact authorised to communicate officially with the *Contracting authority* in connection with the submitted tender on behalf of all *Group members*, including in connection with all relevant questions, clarification requests, notifications, etc., that may be received during the evaluation, award and until the contract signature.
- 3) If the *Contracting authority* awards the contract<sup>12</sup> resulting from this public procurement procedure to the *Group* on the basis of the joint tender, all *Group members* shall be considered parties to the contract in accordance with the following conditions:
  - (a) All *Group members* shall be jointly and severally liable towards the *Contracting authority* for the performance of the contract.
  - (b) All *Group members* shall comply with the terms and conditions of the contract and ensure the proper delivery of the purchases under the contract.
  - (c) The *Group members* grant the *Group leader* all the necessary powers to act on their behalf before the *Contracting authority* for the administration of the contract, including:
    - (i) The *Group leader* shall sign any contractual documents — including the contract, and any amendments thereto — and issue any invoices related to the performance of the contract on behalf of all *Group members*.
    - (ii) The *Group leader* shall act as a single contact point with the *Contracting authority* in relation to the performance of the contract. It shall co-ordinate the delivery of the purchases by the *Group* to the *Contracting authority*, and shall see to a proper administration of the contract.
    - (iii) Payments by the *Contracting authority* related to the contract shall be made to the bank account of the *Group leader*.
- 4) The *Group leader* accepts all the above-mentioned powers granted by the *Group members* to act on their behalf.

Any modification to the present Power of Attorney shall be subject to the *Contracting authority's* express approval. This Power of Attorney shall expire when all the contractual obligations of the *Group* have ceased to exist. The *Group members* cannot terminate it before that date without the *Contracting authority's* consent.

#### 1. Group Leader

Name and surname (in capital letters): ***[of the signatory of this power of attorney power of attorney]***

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<sup>12</sup> When the contract for the procedure is a framework contract, the term “contract” in this document refers to the framework contract and, if relevant, to its specific contracts.

Signature:

2. <sup>13</sup>Group Member

Name and surname (in capital letters): [*of the signatory of this power of attorney power of attorney*]

Signature:

Place and date:

In duplicate in English<sup>14</sup>.

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<sup>13</sup> Add as many lines as members of the Group.

<sup>14</sup> When preparing the contract, one original will be attached to the contracting authority's copy of the contract and the other original to the contractor's copy.



## Commitment letter by an identified subcontractor

### Commitment letter by the identified subcontractor<sup>15</sup>

#### *Letterhead*

EUROPEAN EXTERNAL ACTION SERVICE  
**Public Procurement Procedure Ref.: EEAS/2026/001**  
**BROKER SERVICES FOR MEDICAL INSURANCE**  
**FOR EXPATS IN EU DELEGATIONS**  
Attn: Charles-Michel GEURTS

Place and date:

Ref.: *[insert subcontractor's reference for the letter]*

I, the undersigned, *[insert name and surname of the signatory of this commitment]*, with ID number *[complete]* [and VAT number *[complete]*]<sup>16</sup>, [having the legal capacity required to act on behalf of:

Company: *[complete with full official name]*  
Official legal form: *[complete]*  
Statutory Registration Number: *[complete]*  
Registered address: *[complete with full official address]*  
VAT Number: *[complete]*<sup>17</sup>

hereby confirm that [I][the above-mentioned company] agree[s] to participate as subcontractor in the tender submitted by *[insert name(s) of the candidate(s)/tenderer(s)]* for the above-referred public procurement procedure.

In the event that the tender of the aforementioned candidate(s)/tenderer(s) is successful, [I][the above-mentioned company] commit[s] to make available the resources necessary for the performance of the tasks assigned to [me][our company] in compliance with the terms of the contract<sup>18</sup>.

I further declare that I [am] [or the above-mentioned company are] not subject to conflicting interests which may negatively affect the performance of the contract and that [I][the above-mentioned company] accept[s] the general conditions of the contract, in particular the contractual provisions related to checks and audits.

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<sup>15</sup> One commitment letter per subcontractor.

<sup>16</sup> For natural persons, if applicable.

<sup>17</sup> For legal persons.

<sup>18</sup> When the contract for the procedure is a framework contract, the term “contract” in this letter refers to the framework contract and its specific contracts.

Name (in capital letters): [*complete name and surname of the signatory of this commitment*]

Signature:

In duplicate in English<sup>19</sup>.

Annexes: Declaration on honour on exclusion criteria and selection criteria duly filled in and signed  
Copy of ID Card of signatory person  
[Proof of VAT number]  
[Extract of Registry of Commerce]  
[Proof of power of attorney to represent legally the company]

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<sup>19</sup> When preparing the contract, one original will be attached to the contracting authority's copy of the contract and the other original to the contractor's copy.

## Commitment letter by an entity on whose capacities is being relied

### Letterhead

EUROPEAN EXTERNAL ACTION SERVICE  
**Public Procurement Procedure Ref.: EEAS/2026/001**  
**BROKER SERVICES FOR MEDICAL INSURANCE**  
**FOR EXPATS IN EU DELEGATIONS**  
Attn: Charles-Michel GEURTS

Place and date:

**Ref.:** *[insert entity's reference for the letter]*

I, the undersigned, *[insert name and surname of the signatory of this commitment]*, with ID number *[complete]*, having the legal legal capacity required to act on behalf of:

Company: *[complete with full official name]*  
Official legal form: *[complete]*  
Statutory Registration Number: *[complete]*  
Registered address: *[complete with full official address]*  
VAT Number: *[complete]*

hereby confirm that the above-mentioned company authorises the *[insert name(s) of the candidate(s)/tenderer(s)]* to rely on *[the financial and economic capacity][ and ][the technical and professional capacity]* of the company I represent in order to meet the minimum levels required for the above-referred public procurement procedure.

In the event that the tender of the aforementioned candidate(s)/tenderer(s) is successful, the company I represent commits to make available the resources necessary for the performance of the contract<sup>20</sup>. I further declare that I or the company I represent are not subject to conflicting interests which may negatively affect the performance of the contract and that we accept the general conditions of the contract, in particular the contractual provisions related to checks and audits.

Name (in capital letters): *[complete name and surname of the signatory of this commitment]*  
Signature:

Annexes: Copy of ID Card of signatory person  
Extract of Registry of Commerce  
Proof of power of attorney to represent legally the company

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<sup>20</sup> When the contract for the procedure is a framework contract, the term “contract” in this letter refers to the framework contract and its specific contracts.