

**REQUEST FOR
PROPOSAL TRADE
REPRESENTATIVE**

for the

**ECONOMIC DEVELOPMENT PARTNERSHIP
OF NORTH CAROLINA, GLOBAL BUSINESS
SERVICES DIVISION**

SECTION A - PURPOSE AND INTENT

The Economic Development Partnership of North Carolina's Global Business Services Division is soliciting proposals from experienced entities for the planning and execution of its trade promotion program in Mexico.

SECTION B - DEFINITIONS

EDPNC -	Economic Development Partnership of North Carolina
RFP -	Request for Proposal
Bidder -	A qualified entity experienced in providing trade promotion programs in Mexico.
Contract -	The contractual agreement entered into between the EDPNC and the successful Bidder. The contract constitutes the entire agreement between the EDPNC and the Contractor in connection with this RFP.
Evaluation Committee –	Internal review committee, EDPNC

SECTION C - INFORMATION TO BIDDERS

Closing Date:	Thursday, June 18, 2020 at 5:00 p.m.
Award Date:	Thursday, June 25, 2020
Starting Date of Contract:	July 1, 2020
Completion Date:	June 30, 2021, with options to renew at the EDPNC's discretion for one year on July 1, 2021, and July 1, 2022.
Contract Amount:	The total amount of the contract for FY'20 is estimated to be in the range of \$150,000 to

\$185,000, including domestic and international travel and approved miscellaneous expenses.

SECTION D - PROPOSAL PROCESS

1. **CLOSING DATE:** The closing date for receipt of responses to this RFP is Thursday, June 18, 2020 at 5:00 p.m. (Eastern Daylight Savings Time) by electronic mail. It is anticipated that a final decision on the selection of a contractor will be made by Thursday, June 25, 2020.

Mike Hubbard
Director, International Trade
mike.hubbard@edpnc.com

2. **ELIGIBLE BIDDERS:** All eligible bidders must meet the following minimum eligibility requirements:
 - a) Demonstrate a familiarity with the EDPNC and its Business Development initiatives.
 - b) Have a minimum of 10 years of successful experience providing trade promotion services for goods and services.
 - c) Have an established trade promotion/consulting practice office in Mexico.
 - d) Demonstrate experience assisting US corporations in exporting to Mexico.
 - e) In-depth knowledge of Mexico's business practices including import, distribution, legal and financial systems.
 - f) Fluency in speaking, writing and reading English and Spanish.
 - g) Have excellent references.
3. **SUBMISSION OF PROPOSAL:** The proposal shall consist of the following parts as outlined in this RFP:
 - a) Basic Data on Bidder -- Qualifications and Experience
 - b) Proposal to Implement the Statement of Work
 - c) Budget - Cost of Services

To be considered complete, a signed Assurances, Representations, and Authorization to Release Information form must accompany the response to this RFP.

4. **REJECTION OF PROPOSALS:** Proposals shall be rejected and not reviewed by the EDPNC for any of the following reasons:
 - a) The proposal is not received at the EDPNC on or before **5:00 p.m. (Eastern Daylight Time)** on **Thursday, June 18, 2020** at its offices located at 150 Fayetteville Street, Suite 1200, Raleigh, NC 27601.
 - b) The Bidder fails to respond to any part of this RFP or does not provide information in the format required.
 - c) The proposal is not signed by an authorized representative of the Bidder.
 - d) There is evidence that the Bidder engaged in unfair bidding procedures.
 - e) Financial insolvency of the Bidder.

- f) The Bidder fails to comply with the minimum eligibility requirements of Section D(2) above and is determined to be ineligible.
5. LIMITATION: This RFP does not commit the EDPNC to award a contract or to pay costs incurred by bidder in the preparation of a proposal to this RFP. The EDPNC may accept other than the lowest bid, waive minor informalities, and award a contract based only on the written proposal without any discussions with bidder. Issuance of a contract will be subject to the approval of EDPNC's CEO.
6. REQUESTS FOR CLARIFICATION: Bidders are invited to submit written questions and requests for clarifications regarding the RFP. Bidders may also submit suggestions for changes to the requirements of this RFP. The questions, requests for clarifications, or suggestions must be in writing and received by the EDPNC Contact Person before 5:00 p.m., eastern daylight savings time, prior to Thursday, June 18, 2020. Oral questions will not be permitted. If the questions, requests for clarifications, or suggestions pertain to a specific section of the RFP, the page and section number(s) must be referenced. Written responses to questions, requests for clarifications, or suggestions will be sent to vendors who received RFP's. The EDPNC's written responses will be considered part of the RFP. If the EDPNC decides to adopt a suggestion, the EDPNC will issue an amendment to the RFP.
7. AMENDMENTS TO RFP; DOWNLOADING FROM INTERNET:
- a) The EDPNC reserves the right to amend the RFP at any time. The Bidder shall acknowledge receipt of an amendment in its proposal. If the amendment occurs after the closing date for receipt of bid proposals, the EDPNC may, in its sole discretion, allow Bidders to amend their bid proposals in response to the EDPNC's amendment if necessary. The Bidder may amend its bid proposal. The amendment must be in writing, signed by the Bidder and received by time set for the receipt of proposals. Vendors who submit proposals in advance of the deadline may withdraw, modify, and resubmit proposals at any time prior to the deadline for submitting proposals. Vendors must notify the EDPNC Contact Person in writing if they wish to withdraw their proposals.
- b) All amendments will be posted on the EDPNC's web page at <https://edpnc.com/about-the-edpnc/>. Each Bidder is advised to check this home page periodically for amendments to this RFP, particularly if the Bidder downloaded the RFP from the Internet as the Bidder may not automatically receive amendments. If the Bidder received this RFP as a result of a written request to the EDPNC, the Bidder will automatically receive amendments.
8. COPYRIGHTS: By submitting a bid proposal, the Bidder agrees that the EDPNC may copy the bid proposal for purposes of facilitating the evaluation of the bid proposal or to respond to requests for public records. The Bidder consents to such copying by submitting a bid proposal and warrants that such copying will not violate the rights of any third party. The EDPNC shall

have the right to use ideas or adaptations of ideas that are presented in the bid proposals.

9. CONTRACT:

- a) The EDPNC reserves the right to either award a contract without further negotiation or to negotiate contract terms with the selected Contractor if the best interests of the State of North Carolina and EDPNC would be served.
- b) The successful Bidder must, in a timely manner, enter into a contract with the EDPNC to implement the services contemplated by this RFP. This contract will include, but not be limited to, terms and conditions that clarify the respective roles and responsibilities of the Bidder and EDPNC. Representative subjects that will be included in a final contract include, but are not limited to, the following provisions: payment limitations; work authorization procedures; default and termination terms; indemnification requirements; identification of key personnel; intellectual property rights; non-appropriation or reduction in funding; and clarification that North Carolina law will govern this contract.
- c) It is expected that a contract between the Bidder and EDPNC will be executed within 5 working days of the notification of the award. Failure of the successful Bidder to agree to the terms of a contract within this time period may be grounds for the EDPNC to award the contract to another Bidder.

10. PROPOSAL REVIEW: The EDPNC will initially review all proposals received for completeness. Completed proposals will be evaluated and rated by an internal EDPNC evaluation committee.

The following criteria, not necessarily listed in order of importance, will be used to evaluate proposals:

- Proposer's project approach and methodology;
- Quality of project work plan;
- Description of the proposed deliverables;
- Project management and internal controls;
- Firm's and staff qualifications and experience;
- Business references;
- Administrative capacity to provide the services;
- Financial capability; and
- Candidates with expertise and experience in specific industry/products sectors should so indicate in their proposal and delineate their expertise and experience.

These criteria are general in nature and may be used to develop a more detailed evaluation work sheet. The EDPNC reserves the right to evaluate financial capability of any or all bidders to satisfactorily complete the

requirements of this RFP.

11. PERIOD OF PERFORMANCE: The period of performance will be from July 1, 2020 through June 30, 2021. In the event that the contractor selected through this RFP does not complete the contract, due to termination or any other reason, EDPNC reserves the right to negotiate with the next highest-ranking bidder(s) to complete the contract period without releasing an additional RFP.
12. OPTION TO EXTEND: Based on the availability of funds and at the EDPNC's discretion, effective contract performance, and the needs of the EDPNC, the contract may be extended for up to three (3) years, in one-year increments.
13. PUBLIC RECORDS AND REQUESTS FOR CONFIDENTIAL TREATMENT:
 - a) The EDPNC may treat all information submitted by a Bidder as public information following the conclusion of the selection process unless the Bidder properly requests that information be treated as confidential at the time of submitting the bid proposal.
 - b) The EDPNC's release of information is governed by North Carolina Public Records Laws. Bidders are encouraged to familiarize themselves with this public records laws before submitting a proposal.
 - c) Any request for confidential treatment of information must be included in the transmittal letter with the Bidder's bid proposal. In addition, the Bidder must enumerate the specific grounds in North Carolina Public Records Laws or other applicable laws which support treatment of the material as confidential and explain why disclosure is not in the best interest of the public. The request for confidential treatment of information must also include the name, address, and telephone number of the person authorized by the Bidder to respond to any inquiries by the EDPNC concerning the confidential status of the materials. Any bid proposal submitted which contains confidential information must be conspicuously marked on the outside as containing confidential information, and each page upon which confidential information appears must be conspicuously marked as containing confidential information. Identification of the entire bid proposal as confidential may be deemed non-responsive and disqualify the Bidder.
 - d) If the Bidder designates any portion of the RFP as confidential, the Bidder must also submit one copy of the bid proposal from which the confidential information has been excised. The confidential material must be excised in such a way as to allow the public to determine the general nature of the material removed and to retain as much of the bid proposal as possible. The EDPNC will treat the information marked confidential as confidential information to the extent such information is determined confidential under North Carolina Public Records Laws or other applicable laws by a court of competent jurisdiction. In the event the EDPNC receives a request for information marked confidential, written notice shall be given to the Bidder seven calendar days prior to the release of the information to allow the Bidder to seek injunctive relief pursuant to the North Carolina Public Record

- Laws.
- e) The Bidder's failure to request confidential treatment of material will be deemed by the EDPNC as a waiver of any right to confidentiality, which the Bidder may have had.
14. DISPOSITION OF BID PROPOSALS: At the conclusion of the selection process, the contents of all bid proposals will be in the public domain and be open to inspection by interested parties subject to exceptions provided in North Carolina Public Records Laws or other applicable laws.
15. NONDISCRIMINATION: The EDPNC does not discriminate in the contract award process on the basis of sex, age, race, religion, color, national origin or disability.
16. EDPNC CONTACT PERSON: Any questions concerning this RFP should be directed via email to Mike Hubbard, Director - International Trade mike.hubbard@edpnc.com

SECTION E - BASIC DATA ON BIDDER - Qualifications and Experience

- All proposals must include the following basic data about the bidder:
- Name, telephone number and address, including e-mail address, of bidder.
- Name and title of individual authorized to bind the bidder and submit the proposal.
- Name, e-mail address and telephone number of person EDPNC may contact during the proposal evaluation process.
- Form of business - e.g. sole proprietorship, partnership, corporation, Not-for Profit organization. If a non-North Carolina corporation, indicate state (or country) of incorporation.
- Firm/company background including year established, number of employees and organization chart. Resumes of project managers and any other key staff who will be directly involved in this contract and a description of the role of each.
- Documented experience in performing similar projects by providing EDPNC a list of clients for whom the representative has provided similar services during the past three years. These clients may be contacted as references.
- Bank references for evaluation of financial capability to satisfactorily complete the requirements of this RFP.
- Ability to easily travel to the United States.

- Information concerning terminations, litigation and debarment. Bidder shall provide answers to the following questions:
 - (a) During the last five (5) years, has the Bidder had a contract for services terminated for any reason? If so, provide full details related to the termination.
 - (b) During the last five (5) years, describe any order, judgment or decree of any Federal or State authority barring, suspending or otherwise limiting the right of the Bidder to engage in any business, practice or activity.
 - (c) During the last five (5) years, list and summarize pending or threatened litigation, administrative or regulatory proceedings, or similar matters that could affect the ability of the Bidder to perform the required services. The Bidder must also state whether it or any owners, officers, or primary partners have ever been convicted of a felony. Failure to disclose these matters may result in rejection of the bid proposal or in termination of any subsequent contract. This is a continuing disclosure requirement. Any such matter commencing after submission of a bid proposal, and with respect to the successful Bidder after the execution of a contract, must be disclosed in a timely manner in a written statement to the EDPNC.
 - (d) During the last five (5) years, have any irregularities been discovered in any of the accounts maintained by the Bidder on behalf of others? If so, describe the circumstances of the irregularities.

SECTION F - PROPOSAL TO IMPLEMENT THE STATEMENT OF WORK

Scope of Work

1. The objective to be achieved is the planning and execution of EDPNC's trade promotion program in Mexico.
 - a) Orientation—The successful candidate may need to secure program, sector and industry orientation in North Carolina at or near the outset of the project. Candidates are requested to include a provision for this in their proposal.
 - b) Trade Assistance—the primary mission of the Mexico Representative is to increase North Carolina's exports to Mexico. The majority of North Carolina companies requiring assistance are typically small- to medium-sized companies.
 - c) In the area of Trade Assistance, responsibilities will include, but not be limited to:
 - Providing services outlined by International Trade Promotion Program (See Exhibit A)
 - Providing timely and accurate response to basic market requests;
 - Gathering and reporting market intelligence to the International Trade Division on an on-going basis, identifying market opportunities for North Carolina products and services;
 - Identifying market opportunities (specific leads) for North Carolina

companies;

- Providing regular outreach to local industry associations, business organizations, and media to raise the profile of North Carolina and North Carolina industries. This would include attending appropriate trade shows to gather information on industry developments;
- Supporting the International Trade Division's activities and programs as well as representing the state at selected trade events, including trade shows, seminars and conferences;
- Coordinating North Carolina business development missions to Mexico and North Carolina company presence at trade shows;
- Providing advice, guidance, and assistance on general trade issues for North Carolina companies;
- Maintaining web sites, links, social networks and other web based media developed by the contractor on behalf of EDPNC.

d) Trade Representative to provide assistance in other Latin American countries as agreed upon.

e) Additional Information

- Contractor is permitted to have a virtual office and can work from the location of his/her choice, so long as there are adequate arrangements when it is necessary to meet with companies in a suitable setting.
- Contractor is expected to provide a monthly report to EDPNC outlining Contractor's monthly trade activities, including:
 - Number of trade leads generated from all sources and a description of the leads
 - Number of companies contacted and a summary of communication with each company
 - Number of tradeshow, seminars, and exhibitions participated in and a description of each activity
 - Number of strategic alliance (multiplier) contacts made and a description of the contacts
 - A summary of any assistance provided to EDPNC staff members during the month for lead follow-up, translation of materials, and/or guidance regarding business etiquette, etc.
- Expenses for Contractor will include, but are not limited to:
 - All office related expenses (phone, paper, computer, office rental (optional), internet access).
 - At least two trips to North Carolina during the contract year
 - All domestic travel and related expenses such as lodging and meals
 - Monthly fees for any Association Dues
 - Registration fees for various trade shows and related events
 - Entertainment expenses for networking with prospective companies
 - Shipping, supplies, misc.
- Special Expenses, including but not limited to tradeshow or event sponsorships or costs for marketing displays, may be provided by EDPNC.

2. Mexico Representative to also provide local office support for EDPNC staff and visiting North Carolina companies.

SECTION G - COST OF SERVICES - BUDGET

Price—This is to be a lump-sum (not a time and materials) contract to be paid on a quarterly basis. Proposals should identify a quarterly fee for services for the 12-month period spanning July 2020 through June 2021.

Important note regarding travel expenses: All travel within Mexico, international travel and expenses incurred for the two required trips to North Carolina, shall be included in the proposal price.

Please estimate the approximate number of trips within Mexico and to North Carolina (including the initial orientation trip to North Carolina), number of staff anticipated, and length of stay in North Carolina.

Reimbursement of other travel expenses will be in accordance with EDPNC policies.

SECTION H – ADDITIONAL CONDITIONS

Reporting requirements include:

- Ongoing communication with EDPNC International Trade Managers.
- Provide a monthly report of all activities, interactions, and expenses on behalf of the EDPNC. This report will be due the first week of the new month for the past month's activities.

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Please sign and date the next page prior to submitting bid proposal.

ASSURANCES, REPRESENTATIONS AND AUTHORIZATION TO RELEASE INFORMATION

The bidder, hereby assures and represents with respect to this proposal that:

1. It possesses legal authority to submit this proposal; that a resolution, motion or similar action has been duly adopted or passed as an official act of the Bidder's governing entity authorizing the submittal of this proposal, including all assurances, representations contained herein, and directing and authorizing the person signing below to act in connection with the application and to provide additional information as may be required.
 2. It will comply with all applicable federal and state equal opportunity and affirmative action requirements.
 3. All statements and information made or furnished to the Economic Development Partnership of North Carolina (EDPNC) are true and correct in all material respects. Bidder has not knowingly made any false statements in its proposal. Bidder acknowledges that supplying any information determined to be false, misleading or deceptive will be grounds for disqualification from consideration.
 4. Bidder hereby authorizes the EDPNC to obtain information regarding its performance on other contracts, agreements or other business arrangements, its business reputation, and any other matter pertinent to evaluation and the selection of a successful Bidder in response to this Request for Proposal. It authorizes EDPNC to research the company's history, make credit checks, contact the company's financial institution, contact former and current clients of the company, and perform other related activities necessary for reasonable evaluation of this proposal.
- The Bidder acknowledges that it may not agree with the information and opinions given by such person or entity in response to a reference request. The Bidder acknowledges that the information and opinions given by such person or entity may hurt its chances to receive contract awards from the EDPNC or may otherwise hurt its reputation or operations. The Bidder is willing to take that risk.
 - The Bidder hereby releases, acquits and forever discharges the State of North Carolina, EDPNC, their officers, directors, employees and agents from any and all liability whatsoever, including all claims, demands and causes of action of every nature and kind affecting the undersigned that it may have or ever claim to have relating to information, data, opinions, and references obtained by EDPNC in the evaluation and selection of a successful Bidder in response to this Request for Proposal.
 - The Bidder authorizes representatives of the EDPNC to contact any and all of the persons, entities, and references which are, directly or indirectly, listed, submitted, or referenced in the undersigned's proposal submitted in response to this RFP.

- The Bidder further authorizes any and all persons and entities to provide information, data, and opinions with regard to the undersigned's performance under any contract, agreement, or other business arrangement, the undersigned's ability to perform, the undersigned's business reputation, and any other matter pertinent to the evaluation of the undersigned. The undersigned hereby releases, acquits and forever discharges any such person or entity and their officers, directors, employees and agents from any and all liability whatsoever, including all claims, demands and causes of action of every nature and kind affecting the undersigned that it may have or ever claim to have relating to information, data, opinions, and references supplied to EDPNC in the evaluation and selection of a successful Bidder in response to this Request for Proposal.
- An electronic scan of this signed Authorization is as valid as an original.

Signature

Date

Name and Title of Authorized Person

This form must be signed by an authorized representative of the bidder and submitted to EDPNC along with bidder's proposal.

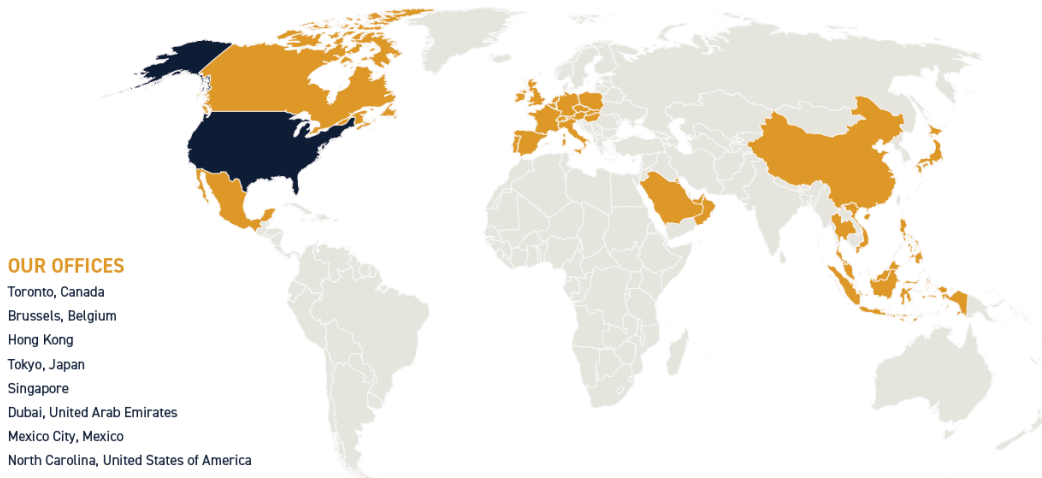
EXHIBIT A: INTERNATIONAL TRADE PROMOTION PROGRAM

GO GLOBAL WITH OUR INTERNATIONAL TRADE DIVISION



LOCATIONS OF OUR FOREIGN AND DOMESTIC OFFICES

The Economic Development Partnership of North Carolina (EDPNC) has experts around the world helping companies in North Carolina prosper by growing internationally. Through two North Carolina and six foreign office locations, the EDPNC's international trade division provides expert assistance to North Carolina firms seeking overseas market opportunities.



OUR OFFICES

Toronto, Canada
Brussels, Belgium
Hong Kong
Tokyo, Japan
Singapore
Dubai, United Arab Emirates
Mexico City, Mexico
North Carolina, United States of America

INTERNATIONAL TRADE MANAGERS

Our experienced multilingual international trade managers offer you their expertise in exporting free of charge. Each specializes in specific industry sectors ranging from automotive to aerospace, textiles to furniture, IT to biotechnology and more. Managers in Raleigh and High Point provide consultations that help you evaluate opportunities and confidently enter new markets.

CONNECT WITH EDPNC:

+1.919.447.7777

NCEconomicDevelopment

150 Fayetteville Street
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@edpnc

company/edpnc



GO GLOBAL

WHAT WE CAN DO FOR YOUR BUSINESS

ADVOCACY

Help you understand and navigate government restrictions and difficult or complex trade regulations, policies and standards.

MARKET INTELLIGENCE

Provide information on the market climate of export destination countries, including economic, social and political data.

PRODUCT REVIEW

Examine the product standards required for entering specific foreign markets and look at existing local and international competitors in those markets.

AGENT/DISTRIBUTOR/BUYER

Have our foreign offices connect you with vetted international distributors, resellers and prospective buyers.

TRADE SHOW ASSISTANCE

Inform you of industry-specific events that can help you enter new markets. Companies, for example, can jointly and affordably exhibit with the EDPNC at key international trade shows around the world.

MARKET RECOMMENDATIONS

Recommend potential markets for your products or services.

PRICING EVALUATION

Help you set the right price to make your product profitable in specific international markets.

EXPORT EDUCATION

Provide expert-led, one-day workshops for your employees, so they know how to comply with U.S. export control laws, understand critical trade topics and more.

EXPORT FINANCE ASSISTANCE

Connect you to export finance and risk-mitigation programs of the Export-Import Bank of the United States, the U.S. Small Business Administration and other trade financing organizations.

MARKET ENTRY STRATEGY

Help you identify distribution channels for your products and the best ways to approach new markets.

CERTIFICATE OF FREE SALE


Provide Certificate(s) of Free Sale for a non-food or non-drug products, which is sometimes required for certain items to enter foreign countries.

CONNECT WITH EDPNC:

+1.919.447.7777

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