****

**Bid Evaluation Report and Recommendation for Award of Contract (BER-G11)**

**Procurement of Goods and Related Services**

**One Stage - One Envelope (1+1)**

***July 2023***

***Preface***

1. *This guide is not part of the report. It should not appear in the report submitted to the Caribbean Development Bank (CDB). Similarly, notes to the Recipient*[[1]](#footnote-1) *in italics throughout this template are also not included in the report.*

***2****. Recipients are expected to use this Bid Evaluation Report – Goods* ***(BER-G11)*** *for the evaluation of Bids of the one stage, one envelope Selection Method resulting from:*

* *International Competitive Bidding (ICB) and Regional Competitive Bidding (RCB).*
* *The* ***BER-G11*** *should also prove useful, with appropriate modifications, for National Competitive Bidding (NCB) and Limited Bidding (LB) at an international/regional or national level****[[2]](#footnote-2)****.*
* *The BER-G11, with some adjustments, can be used for the evaluation of Bids for non-consulting services purchased from Suppliers. Such services include equipment and building maintenance and repair, information technology implementation services, audits, land surveys and communications.*

***3.*** *The following CDB’s Standard Procurement Documents (SPDs), policies, procedures and guidance notes shall govern the evaluation process:*

* *When using ICB or RCB Selection Methods, unless otherwise agreed with CDB, Recipients shall use CDB’s prevailing Standard Procurement Documents (SPDs) for Goods - one stage-one envelope. The SPD includes Instructions to Bidders (ITB) and the contract-specific information in the Bid Data Sheet (BDS). The ITB and BDS requirements must be followed and reflected in the* ***BER-G11.***
* *“Procurement Policy for Projects Financed by CDB,” (****Policy****), dated November 2019.*
* *“Procedures for Projects Financed by CDB”* ***(Procedures),*** *dated January 2021.*
* *“Guidance Note on Bid Evaluation for Goods, Works and Non-Consulting Services,” June 2021* ***(GN)****.*

***4****. The* ***GN*** *contains essential advice for evaluating Bids for Goods and thus should be used in conjunction with the* ***BER-G11****. Rather than duplicate aspects of the* ***GN*** *here, relevant* ***GN*** *sections are cross-referenced. The forms referenced as examples in the* ***GN*** *are included here for use by the Recipient. In the event of a conflict between the GN and the BER-G11, the BER-G11 will govern.*

***5.*** *The evaluation process is designed to select the Most Advantageous Bid(s)* ***(MAB).*** *The evaluation and the resulting* ***BER-G11*** *need not necessarily be lengthy. Well-defined and low-value Goods Contracts without regional preferences can usually be quickly and easily evaluated. The* ***BER-G11*** *should contain any attachments to explain Bid evaluation details, borderline variances in a Bid ruled nonresponsive by the Recipient or an unusual pricing structure. Cross-referencing should be used extensively, as well as references to pertinent SPD clauses.*

***6.*** *Recipients should study the BER-G11, including the guidance notes, during project preparation, to properly assess the managerial and administrative conditions needed for Bid evaluation. CDB staff are available to explain the procedures, including any modifications necessary for evaluation using Bidding documents other than the SPD. CDB encourages the employment of experienced consultants to help in evaluations for complex contracts. Consultant fees can be paid from CDB financing if allowed for in the Financing Agreement.*

***7.*** *The defined terms and acronyms in the Policy and Procedures are, where applicable, the same as those in this BER-G11. Also, cross-referencing to the Procedures and the SPD is used in this BER-G11 to assist users.*

*8. To obtain further information on procurement under CDB-financed projects, contact:*

*Procurement Policy Unit*

*Caribbean Development Bank*

*P.O. Box 408*

*Wildey, St. Michael*

*Barbados*

*Email:* [*procurement@caribank.org*](mailto:procurement@caribank.org)

*Website:* [*www.caribank.org*](http://www.caribank.org)

**Table of Contents**

[Letter of Transmittal 6](#_Toc135925532)

[Section I – Summary Evaluation—Text 7](#_Toc135925533)

[1. Background 7](#_Toc135925534)

[2. The Selection Process 7](#_Toc135925535)

[3. Evaluation 7](#_Toc135925536)

[4. Contract Award 7](#_Toc135925537)

[Table 1: Identification 8](#_Toc135925538)

[Table 2: Bidding Process 9](#_Toc135925539)

[Table 3: Bid Submission and Opening 10](#_Toc135925540)

[Table 4A. Bid Prices (as Readout) and a Record of the Public Opening of Bids 11](#_Toc135925541)

[Table 4B: Attendance Sheet for the Public Opening of Bids 12](#_Toc135925542)

[Table 5. Preliminary Examination 13](#_Toc135925543)

[Table 6. Corrections and Unconditional Discounts 14](#_Toc135925544)

[Table 7. Exchange Rates 15](#_Toc135925545)

[Table 8. Currency Conversion (Single or Multiple Currencies) 16](#_Toc135925546)

[Table 9. Additions, Adjustments, and Priced Deviations 17](#_Toc135925547)

[Table 10. Regional Preference for Goods 18](#_Toc135925548)

[Table 11. Proposed Contract Award 19](#_Toc135925549)

[Annex 1 – Evaluation Guide 21](#_Toc135925550)

[Annex II. Bid Evaluation Summary Checklist 27](#_Toc135925551)

**Standard Cover**

**Bid Evaluation Report**

**and**

**Recommendation for Award of Contract**

**(BER-G11)**

**Goods**

**and**

**Related Services**

**One Stage - One Envelope**

Name of Project:

Project No.:

Contract Name:

Identification Number:

Date of Submission:

# Letter of Transmittal

*Where CDB’s no objection (NO) is required for the evaluation results[[3]](#footnote-3)****,*** *the BER-G11 (consisting of the following documents) should be attached with a Letter of Transmittal from the Recipient ministry, department, or agency responsible for communications with CDB. The letter should highlight conclusions and offer any additional information that would help to expedite review by CDB. In addition, it should highlight any unresolved or potentially contentious issues. The letter should be sent to the CDB Operations Officer responsible for the project.*

|  |  |
| --- | --- |
| Section I | Summary Evaluation – Text |
| Table 1 | Identification |
| Table 2 | Bidding Process |
| Table 3 | Bid Submission and Opening |
| Table 4A | Bid Prices (as Read Out) and a Record of the Public Opening of Bids |
| Table 4B | Attendance Sheet for Public Opening of Bid |
| Table 5 | Preliminary Examination |
| Table 6 | Corrections and Unconditional Discounts |
| Table 7 | Exchange Rates |
| Table 8 | Currency Conversion (Single or Multiple Currencies) |
| Table 9 | Additions, Adjustments, and Priced Deviations |
| Table 10 | Regional Preference for Goods |
| Table 11 | Proposed Contract(s) Award |
| Table 11A | Evaluation of Conditional Discounts, where applicable. |
| Table 12 | Evaluation Certification |

*Where no Bids are responsive, the Recipient shall describe the proposed approaches to address this challenge.*

*Where the results are subject to post review, the BER-G11 and all supporting documentation shall be retained in the Recipient’s project files for future review by CDB.*

Section I – Summary Evaluation—Text[[4]](#footnote-4)

|  |  |
| --- | --- |
| 1. Background | *Include a brief description, context, scope, and objectives of the Goods.* |
| 1. The Selection Process | *Briefly describe the Bidder selection process, beginning with the advertising (if required) or establishing a list of Prequalified Bidders.*  *Describe significant events that may have affected the timing (delays, critical correspondence with CDB, the extension of Bid submission date, Addenda with significant changes to the bidding documents, and so on).* |
| 1. Evaluation | *Briefly describe the meetings and actions taken by the Bid Evaluation Committee, outside evaluation assistance, Bids set aside as nonresponsive and reasons, relevant correspondence with CDB, and compliance of evaluation with ITB.*  *List items (if any) requiring further technical or financial negotiations with recommended Bidder(s) (refer to Procedures, Paragraph 6.60).*  *Include timing and actions to be taken to award the Contract(s) including, if applicable accommodating the standstill period.*  *Where applicable, a detailed technical and performance analysis of the Goods offered by Bidders should be provided[[5]](#footnote-5) addressing the pass/fail conditions of the bidding documents.* |
| 1. Contract Award | *The Recipient shall select Bidder(s) for award of contract(s) that offer the Most Advantageous Bid(s)* ***(MAB)[[6]](#footnote-6).*** *Summarise results from Table 11 or 11A (where applicable).* |

Table 1: Identification

|  |
| --- |
| **Name of Project:** |
| **Project No.:** |
| **Contract Name:** |
| **Contract No:** |

|  |
| --- |
| **Date of Submission:** |

|  |  |
| --- | --- |
| * 1. Name of Recipient |  |
| * 1. Financing Agreement Reference |  |
| * 1. Date of Effectiveness | Click or tap to enter a date. |
| * 1. Terminal Disbursement Date |  |
| (a) original | Click or tap to enter a date. |
| (b) revised | Click or tap to enter a date. |
| * 1. Purchaser: |  |
| (a) name |  |
| (b) address |  |
| * 1. Cost Estimate/Budget (1) |  |
| * 1. Method of Procurement | Choose an item. |
| * 1. CDB Prior Review Required/NO (2) | Choose an item. |
| * 1. Regional Preference Allowed | Choose an item. |
| * 1. Contract type: |  |
| (a) Lump Sum | Choose an item. |
| (b) Ad Measurement | Choose an item. |
| (c) Price Subject to adjustment | Choose an item. |
| 1.11 Co-financing, if any: |  |
| Agency name |  |
| Percent financed by agency |  |

*(1) Use amount stated in the Procurement Plan.*

*(2) If the response is “no,” items 2.2(b), 2.4(b), and 2.6(b) in Table 2 and in Table 3 item 3.5(c) state “Not Applicable”, unless the CDB’s prior review was explicitly requested.*

# Table 2: Bidding Process

|  |  |  |
| --- | --- | --- |
| 2.1 General Procurement Notice |  | |
| * + 1. first issue date | Click or tap to enter a date. | |
| * + 1. latest update | Click or tap to enter a date. | |
| 2.2 Prequalification |  | |
| * + 1. Number of firms prequalified | Choose an item. | |
| * + 1. CDB NO, if required | Choose an item. | |
| * 1. Specific Procurement Notice – Names of publication media and duration | **Name** | **Duration** |
| * + 1. National |  |  |
| * + 1. International/regional |  |  |
| * + 1. Gazette |  |  |
| * + 1. Website(s) |  |  |
| * 1. Standard Procurement Document |  | |
| * + 1. title, publication date | Click or tap to enter a date. | |
| * + 1. date of CDB’s NO | Click or tap to enter a date. | |
| * + 1. date of issue to Bidders | Click or tap to enter a date. | |
| 2.5 Number of Bidders issued documents |  | |
| * 1. Addenda to Bid documents, if any |  | |
| * + 1. list all issue dates | Click or tap to enter a date. | |
| * + 1. date(s) of CDB’s no objection | Click or tap to enter a date. | |
| 2.7 Date of pre-Bid conference, if any | Click or tap to enter a date. | |
| 2.8 Date minutes of conference sent to Bidders and CDB | Click or tap to enter a date. | |

# Table 3: Bid Submission and Opening

|  |  |
| --- | --- |
| * 1. Bid Submission Deadline |  |
| * + 1. original date, time | Click or tap to enter a date.  Time: |
| * + 1. extensions, if any | Click or tap to enter a date. |
| * 1. Bid opening time, date | Click or tap to enter a date.  Time: |
| * 1. Record of Bid opening, date sent to CDB *(1)* | Click or tap to enter a date. |
| * 1. Number of Bids submitted |  |
| * 1. Bid validity period |  |
| * + 1. originally specified (Days) | No. of days:  Click or tap to enter a date. |
| * + 1. extension(s) if any | No. of days:  Click or tap to enter a date. |
| * + 1. date of CDB’s NO, if required | Click or tap to enter a date. |

*(1). Tables 4A and 4B are to be used for this purpose.*

# Table 4A. Bid Prices (as Readout) and a Record of the Public Opening of Bids

The following Bids were submitted by the Bid submission deadline of *(tim*e) on *(date).* They were opened and read out at a public Bid opening starting at *(time)* and closing at *(time)* on *(date)* at *(full address, including room number, of the location of public opening* ***[1])*.**

|  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **Name and Country of Registration of Bidder *[2]***  **(a)** | **Read-Out Bid Price and Currency(ies) *[3]***  **(b)** | | **Read-Out Discount**  **[Unconditional]**  **(c)** | | **Total Bid Price**  **and**  **Currency(ies)**  **(d)** | **Bid Security Amount and**  **Currency**  **(e)** | | **Bid Securing Declaration**  **(Y/N)**  **(f)** | **Signature**  **of**  **Bidder’s**  **Representative *[4]***  **(g)** |
|  |  |  | **Amount** | **%** |  | **%** |  | Choose an item. |  | |
|  |  |  |  | |  |  |  |  |  | |

The following Bids were modified, or substitutes offered: *(Name and country of Bidder)* ***[5]***

The following Bids were withdrawn: *(Name and country of Bidder)* ***[6].***

*\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_*

Name, Designation and Signature Name, Designation and Signature Name, Designation and Signature*.*

***All members of the Bid Opening Committee to sign the Record.***

***[1]*** *This information should be the same as specified in the Instruction to Bidders section of the bidding documents. Where electronic bidding is to be used, the system must be approved by CDB.*

***[2]*** *For Bidders that are a JV, the names, and countries of all the parties to the JV should be read out and recorded.*

***[3]*** *Additional columns to be added to record the readout information in the event Bidders is allowed to offer: (i) Alternative Bids (ii) Prices for Lots – record each Lot separately (iii) Conditional Discounts - refer* ***Annex I item 3(k)*** *herein. (iv) Bid prices composed of several currencies - each currency and amount shall be entered on a separate line for the Bidder involved.*

***[4]*** *In the case of a Bidder that is a JV, the duly empowered representative of the JV, if present, should sign.*

***[5]*** *Record the nature of the modification or substitution in the applicable part of the Table or add a text paragraph to this Record.*

***[6]*** *A withdrawn Bid should not be opened but recorded here. The attendees are only advised of the withdrawal, with no other information readout.*

***For additional guidance, refer to GN Annex III Table 4***

# Table 4B: Attendance Sheet for the Public Opening of Bids

|  |  |  |  |
| --- | --- | --- | --- |
| **Name and Country of**  **Registration of Bidder** | **Name of Representative**  **(Printed)** | **Designation** | **Signature of Representative of**  **Bidder** |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |

# Table 5. Preliminary Examination

***Adjust Table to reflect Bids on a Lot basis, where applicable***

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| **Bidder** | **Verification** | **Eligibility** | **Bid Security/**  **Declaration** | **Completeness of Bid** | **Substantial Responsiveness** | **Acceptance for Detailed Examination** |
| ***(a)*** | ***(b)*** | ***(c)*** | ***(d)*** | ***(e)*** | ***(f)*** | ***(g)*** |
|  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |
| *Notes:*   1. *For explanations of headings and checklist for compliance – refer to GN Section – Preliminary Examination pages 8-13 and Annex III, Table 5 and Annex I paragraph 2, herein.* 2. *Technical Completeness and Responsiveness should also be considered at this time [refer Annex I paragraph 3(b) herein] before detailed evaluation of Bids starts.* | | | | | | |

***If required, use a separate sheet to detail reasons of Bids that pass or fail the Preliminary Examination. Bids*** *that are found to be responsive from the Preliminary Examination proceed to the Detailed Evaluation where the* ***quality and compliance*** *of the technical offer**are evaluated in detail against the specifications and technical requirements in the bidding document, with such analysis covered under point 3 of section I. If the detailed technical evaluation finds a Bid to not be substantively responsive it shall not be further considered but otherwise the detailed financial evaluation will commence under Table 6.*

# Table 6. Corrections and Unconditional Discounts

|  |
| --- |
| ***Adjust Table to reflect Bids on a Lot basis, where applicable*** |

|  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **Bidder *(1)*** | **Read-out Bid Price(s) *(2)*** | | **Corrections *(3)*** | | **Corrected Bid Price(s)** | **Unconditional Discounts *(4)*** | | **Corrected/Discounted Bid Price(s)** |
|  | **Currency(ies)** | **Amount(s)** | **Computational Errors** | **Provisional Sums** |  | **Percent** | **Amount(s)** |  |
| ***(a)*** | ***(b)*** | ***(c)*** | ***(d)*** | ***(e)*** | ***(f) = (c) + (d) - (e)*** | ***(g)*** | ***(h)*** | ***(i) = (f) – (h)*** |
|  |  |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |  |
| ***Notes****:*  *(****1)*** *Only Bids accepted for detailed examination – refer* ***Table 5, column (g)*** *should be included in this and subsequent tables.*  ***(2)*** *Columns (****a), (b), (c)*** *and (****h)*** *are from* ***Table 4A (columns a, b, and c, respectively).***  ***(3)*** *Corrections in* ***column (d)*** *may be positive or negative.*  ***(4)*** *If the discount is offered as a percent,* ***column (h)*** *is usually the product of the amounts in* ***columns (f) and (g)****. If the discount is provided as an amount, it is entered directly in* ***column (h)****. A price increase is a negative discount. Where Conditional Discounts are offered and comply with the terms of ITB 14 they shall be considered in the award selection once all aspects of the evaluation are completed –* ***refer to Table 11/11A and Annex I paragraph 3(k****) herein.* | | | | | | | | |

***For additional guidance, refer to GN Annex III Table 6***

# Table 7. Exchange Rates

|  |  |
| --- | --- |
| 1. Currency Used for Bid Evaluation: |  |
|  |  |
| 1. Effective Date of Exchange Rate (day/month/year): |  |
|  |  |
| 1. Authority or Publication Specified for Exchange Rate category to be used: |  |
|  |  |

***Note:*** *Attach a copy of exchange rates provided by a specified authority or publication*.

# Table 8. Currency Conversion (Single or Multiple Currencies)

**Specify Evaluation Currency:**

|  |
| --- |
| ***Adjust Table to reflect Bids on a Lot basis, where applicable*** |

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Bidder** | **Currency(ies) of Bid** | **Corrected/Discounted** | **Applicable** | **Evaluation Currency** | |
|  |  | **Bid Price(s)** | **Exchange Rate(s)** | **Bid Price(s)** | **Total Bid Price** |
| ***(a)*** | ***(b)*** | ***(c)*** | ***(d)*** | ***(e) = (c) x (d)*** | ***(f)*** |
|  |  |  |  |  |  |
|  |  |  |  |  |  |
|  |  |  |  |  |  |
|  |  |  |  |  |  |

***Note****:*

*[1] Columns a, b and c are from Table 6,* ***columns (a), (b) and (i) respectively.***

*[2]* ***Column (d) is from Table 7.***

*[3]* ***Column (f) is the sum of Bid prices in column (e) for each Bidder.***

***For additional guidance, refer to GN Page 14 - Conversion of Bid Prices to a Single Currency***

# Table 9. Additions, Adjustments, and Priced Deviations

**Specify Evaluation Currency:**

|  |
| --- |
| ***Adjust Table to reflect Bids on a Lot basis, where applicable*** |

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Bidder** | **Total Bid Price** | **Additions** | **Adjustments** | **Priced Deviations** | **Total Price** |
| ***(a)*** | ***(b)*** | ***(c)*** | ***(d)*** | ***(e)*** | ***(f) = (b) + (c) + (d) + (e)*** |
|  |  |  |  |  |  |
|  |  |  |  |  |  |
|  |  |  |  |  |  |

*(1)* ***Columns (a) and (b)*** *are from* ***Table 8, columns (a) and (f)*** *respectively*

*(2) Each insertion in* ***columns (c), (d), or (e)*** *should be footnoted and explained in adequate detail, accompanied by calculations, including the conversion of monetary items to the evaluation currency. For definitions/examples of the three considerations in* ***columns (c) through (e)*** *– refer* ***Annex I paragraphs 3(f), (g) and (h) herein.***

*For additional guidance, refer to GN Annex III Table 6*

# Table 10. Regional Preference for Goods

**For Goods Manufactured in Borrowing Member Countries of CDB**

**Specify Evaluation Currency:**

|  |
| --- |
| ***Adjust Table to reflect Bids on a Lot basis, where applicable*** |

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
| **Bidder** | **Regional Preference Group** | **Total Price** | **Exclusions for Preference** | **Revised Total** | **Regional Preference (15 %).** | **Preference Price** | **Total Comparison Price** |
| ***(a)*** | ***(b)*** | ***(c)*** | ***(d)*** | ***(e) = (c) – (d)*** | ***(f)*** | ***(g)*** | ***(h) = (c) + (h)*** |
|  |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |

***[1] Full details of the procedures can be found in Section III ITB 33*** *of the bidding documents* ***and Procedures Annex 4.***

***[2]******Column (b****) Bidders are categorised in Group A or B – preference only applied to Group B Bidders*

***[3] Column (c)*** *is the sum of costs in* ***column (f) Table 9***

***[4] Column (d)*** *is the sum of* ***columns (c), (d) and (e)*** *from* ***Table 9,*** *plus other costs incurred within the Recipient's country. Footnotes should be provided to explain the significant components of* ***column (d)***

***[5] Column (g)*** *will be the Preference Amount that is the product of* ***column (f) to column (e)*** *for* ***Group B Bidders.***

***(6) The results of the calculations from item (3) should then determine the MAB(s) either in Group A or B.***

# Table 11. Proposed Contract Award

|  |
| --- |
| ***Adjust Table to reflect Bids on a Lot basis, where applicable*** |

|  |  |  |
| --- | --- | --- |
| 1. Bidder(s) offering MAB(s)  * Name(s) * Address(es) |  | |
| 1. If Bid(s) submitted by an agent, list actual Supplier(s)  * Name(s) * Address(es) |  | |
| 1. If Bid(s) from a JV, list all partners, nationalities, and estimated share of the Contract(s) |  | |
| 1. Principal countries of origin of Goods/materials |  | |
| 1. Estimated date (month/year) of Contract signing. |  | |
| 1. Estimated delivery to project site |  | |
|  | **Currency** | **Amount** |
| 1. Bid Price (Read-out) - ***Table 4A*** |  |  |
| 1. Correction of Errors - ***Table 6 column (d)*** |  |  |
| 1. Deduct Discounts - ***Table 6, column (h)***[[7]](#footnote-7) |  |  |
| 1. Additions - ***Table 9 column (c)*** |  |  |
| 1. Adjustments -***Table 9 column (d)*** |  |  |
| 1. Priced Deviations –***Table 9 column (e)*** |  |  |
| **Total Evaluated Sum (s)** |  |  |
| 1. Deduct Additions, Adjustments, Priced Deviations from Evaluated Sum |  |  |
| **Proposed Contract(s) Award Amount(s)[[8]](#footnote-8)** |  |  |
| 1. Budget |  |  |

***For additional guidance, refer to GN Page 17 - Proposed Contract Award and Annex I herein***

*If (a) none of the Bids are found to be responsive, or (b) Bids are unreasonably high in price compared with earlier estimates/budgets (line 14), or (c) none of the Bidders are qualified, the Recipient may consider the rejection of all Bids (CDB’s concurrence is required before rejecting where there is prior review - Procedures Section 6.60). The Recipient should include with the BER-G11 the proposed subsequent actions to address the causes for the failed procurement.*

**Table 12 – Evaluation Certification**

**Respectfully Submitted by the Evaluation Committee**

|  |  |  |  |
| --- | --- | --- | --- |
| **Name** | **Organisation/Position** | **Date** | **Signature** |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
| I confirm that the evaluation was conducted in full compliance with the CDB’s Procurement Procedures. All members of the Evaluation Committee have certified no conflict of interest in accordance with Procedures, Section 6.37.  Chairperson’s Name: Signature Date | | | |

# Annex 1 – Evaluation Guide

|  |  |
| --- | --- |
| 1. **Principles of Evaluation** | *The Bid evaluation process seeks to determine the Bidder(s) offering the Recipient the MAB(s) based on the evaluation criteria in the SPDs and:*   * *“Procurement Policy for Projects Financed by CDB,”* ***(Policy)*** *dated November 2019.* * *“Procedures for Projects Financed by CDB”* ***(Procedures),*** *dated January 2021.* * *“Guidance Note on Bid Evaluation for Goods, Works and Non-Consulting Services,” June 2021* ***(GN).***   *This Annex I and Annex II attached here also provide evaluation guidance.*  *After the public opening of Bids, information relating to the clarification and evaluation of Bids shall not be disclosed to Bidders or other persons not officially concerned with this process until the successful Bidder is notified of the contract award[[9]](#footnote-9).*   * + 1. ***Bid Evaluation Committee:*** *In accordance with Procedures Paragraph 6.37, CDB requires the appointment by the Recipient of an evaluation committee consisting of a minimum of three qualified members.*   *There might be a considerable advantage if the same members participated in the preparation of the bidding documents.*  *All committee members shall make a written declaration prior to commencing their work to keep Bid-related information confidential and that they do not have any conflicts of interest.*  *Where Bids are hard copies, members conduct the evaluation in a secure office where all Bid documents can be kept. Electronic Bids must be adequately protected from unauthorised access and can be remotely worked on by members[[10]](#footnote-10).*   * + 1. ***Request of clarifications from Bidders:*** *On occasion, the Recipient may request clarifications of Bidders concerning ambiguities or inconsistencies in the Bid. As required in the Procedures Paragraphs 6.05 and 6.45 and the bidding documents, such requests shall be in writing. No change in the price or scope of the originally offered Works shall be sought or accepted, except for correcting any arithmetic errors. The responses from Bidders shall also be in writing. Refer to GN Annex II that provides a sample of a Bid clarification request letter.*   ***No circumstances shall justify meetings or conversations between the Recipient (or its consultants) and Bidders during the Bid evaluation process.***  *Bidders frequently attempt to contact the Recipient during Bid evaluation, directly or indirectly, to query the progress of evaluation, offer unsolicited clarifications, or provide criticisms of their competition. Receipt of such information should be acknowledged as to receipt only. Recipients must evaluate Bids based on the information provided in the respective Bids. On occasion, Bidders approach CDB with information. CDB’s policy is to acknowledge the correspondence and pass it on to the Recipient for its consideration.* |
| 1. **Preliminary examination of Bids** | *Preliminary Examination is the first step in the evaluation process determining the compliance of each Bidder and its Bid by examining the following categories:*   * *Verification* * *Eligibility* * *Bid Security or Bid Securing Declaration* * *Completeness of Bid* * *Substantial Responsiveness; and* * *Acceptance for Detailed Evaluation.*   *The duration of the validity of each Bid should be the one specified in the ITB and should be confirmed by the Bidder in the signed Letter of Bid. If exceptional circumstances occur in which award cannot be made within the validity period, extensions in writing should be requested of Bidders, in accordance with the ITB and Procedures, Section 6.89. Extensions to the validity of Bid security should also be requested of Bidders, if necessary. Note any extensions in Table 3.* |
| 1. **Demand Evaluation of Bids** | *Details of these categories and the examination process can be found in*   * *GN Pages 8 through 13 and Annex III; and* * *Procedures, Sections 4 and 5.*   *Only those Bids surviving the Preliminary Examination should be evaluated in this phase.*   1. ***Modifications****: In accordance with the ITB, Bidders can submit Modifications prior to the opening of the Bid. The modifications will be read out at the Bid opening. The modifications may include evidence of performance, or other improvements, and the impact of such should be fully reflected in the examination and evaluation of the Bids.* 2. ***Technical Evaluation****: A brief review of the technical aspects of the Bids should be conducted under the Preliminary Examination (Table 5). A major deficiency such as a Bidder failing to provide required drawings and specifications could set the Bid aside as nonresponsive. Bids that pass the examination then proceed to detailed technical evaluation and the results included in Section I Summary. In addition, where technical issues have financial impacts such as some listed below, e.g., Alternative Bids, there must be consistency in the applicable price Tables.* 3. ***Unconditional Discounts:*** *The original Bid or a subsequent Modification (reflecting changes to the original Bid prior to the Bid submission deadline) may offer unconditional discounts. These are to be read out at the Bid opening and reflected in the Bid price in Table 6 Column (h). The effect of unconditional discounts (or increases) must be applied to the appropriate base specified in the Bid.* 4. ***Corrections for computational Errors****: The methodology for correcting computational errors is described in ITB 31. The readout Bid prices and their corrections should be noted in* ***Table 6, column (d)****. The sums are to be included both in the evaluated prices and contract award. The corrections are considered binding on the Bidder.* 5. ***Evaluation Currency****: The Bids, as corrected for computational errors and adjusted for discounts, should be converted to a common evaluation currency, as described in the ITB. The exchange rates to be used in the calculations are to be listed in Table 7. If multiple exchange rates exist for a particular currency (for commercial, government transactions, etc.), indicate which applies with reasons for the choice. The ITB may permit the use of the multiple currency options, where the Bid price can be expressed in several currencies, but usually not more than three plus the Recipient's currency. Table 8 is to be adjusted in this case.* 6. ***Additions****: Any resulting costs developed by the Recipient for Additions (e.g., for nonmaterial non-compliances - refer ITB 30) – shall be expressed in the evaluation currency and included in* ***Table 9, column (c)*** *for Bid comparison purposes. Should Bidder(s) offering the MAB(s) including the estimated costs of Additions, then such costs will be the subject of pre-award negotiations.* 7. ***Adjustments:*** *ITB 34.6 and Section III of the bidding documents will define what Adjustments can be made and the formula to develop the cost impact to be considered in the Bid evaluation. Some examples include life cycle costs – [Procedures, Annex 5, Paragraph 4] and performance and productivity of the goods offered. The value of the Adjustments will be expressed in terms of cost in the evaluation currency and shown in* ***Table 9, column (d).*** 8. ***Priced Deviations****: ITB 34.6 and Section III of the bidding documents will specify where applicable acceptable deviations together with the formula to develop the cost impact to be considered in the Bid evaluation. Some examples include alternate terms of payment or delivery dates. The value of the Deviations will be expressed in terms of cost in the evaluation currency and shown in* ***Table 9, column (e).*** 9. ***Additional Evaluation Considerations****:* ***Table 9 column (f)*** *reflects the results of all the financial prices and changes and additions and establishes the Total Price for each Bidder, including prices for Lots. Prices will then have to be adjusted for application of:*  * *Regional preference* ***(Table 10)*** *if any is allowed – refer to item****(j)*** *below.* * *Conditional Discounts –* ***(Table 11A)*** *and refer to* ***item (k)*** *below.*  1. ***Regional Preference:*** *If a regional preference is allowed, the ITB will so state and provide detailed procedures to be used in determining the eligibility for preference and the financial impact on Bids -* ***refer to Table 10*** *herein, Procedures, Paragraphs 6.52 and 6.53, and Annex 4. The price change will be reflected in* ***Table 10 Column (h).*** 2. ***Conditional Discounts:*** *These are discounts offered by Bidders conditional upon being awarded certain Lots within the current Contract or combined with other Contracts (Packages). However, such discounts must comply with ITB 14 in the bidding documents. Bid evaluation in such cases can be somewhat complicated, particularly for Contracts where regional preference may apply. The amounts of Conditional Discounts offered by each Bidder may vary with the potential number of Lots or Packages awarded. The ITB may also limit the number or total value of awards of Lots or Packages to a Bidder(s) based on the financial and technical capacity of Bidder(s) (refer to* ***item (l****) below). Thus, a Bidder offering the MAB on a particular Package, may be denied an award because of such a restriction.*   *The Recipient shall select the optimum combination of awards based on the MAB(s), consistent with the qualification criteria. Presentations of the calculations should be made on an attachment to the BER-G11* ***(Table 11/11A)*** *and summarised in Section 1, which should include the Bid evaluation(s) for the other Contracts if they have been evaluated separately.*   1. ***Qualification****: Prior to finalising the selection of the Bidder(s) offering the MAB(s), the Recipient must assess or reassess (where prequalification was conducted by the Recipient) the current qualifications of the Bidder(s) on a pass/fail basis. This is based on information submitted with the Bid(s) to meet financial, technical, experience criteria required by Section III of the bidding documents.* 2. ***Alternative Bids****: The bidding documents may request or allow the Recipient to accept Bids for Alternatives*[[11]](#footnote-11)*. The condition for an Alternative is to be defined in ITB 13.1 and Section III of the bidding documents. The Recipient, if it is willing to accept the Bid for the Alternatives, should provide justification for doing so. Calculations for the evaluation of Alternatives should be provided in an attachment to the BER-G11 and the price change reflected in* ***Table 11****.* |
| 1. **Award of Contract** | 1. ***Contract award:*** *For contracts subject to CDB's No Objection (NO), the BER-G11 should be submitted to CDB preferably no later than three (3) weeks before the expiration of the validity of the Bid(s). Once CDB’s NO is received, the Recipient can negotiate with the selected Bidder(s*[[12]](#footnote-12)*). Where negotiations take place, a draft Contract initialled by the Contractor(s) is then submitted by the Recipient to CDB for NO and, upon CDB’s NO, the Contract(s) can then be awarded.*   *If there are not to be negotiations, then once NO received for the BER-G11 then Contract(s) can be awarded.*  *Once the Contract(s) has been awarded, and CDB is advised, if the Contract is subject to prior review, CDB will publish a description of the Contract(s), the name and nationality of the Contractor(s), and the Contract price(s) (Procedures Paragraph 6.97). In addition, the Recipient will publish Contract Award Notices in accordance with Procedures Paragraphs 6.96 and 6.97.*   1. ***Standstill Period:*** *For some Contracts, there is a 10-working day "standstill period" (Procedures, Paragraph 6.90). In this case, the BER-G11 receives NO from the CDB, where applicable, and the Recipient issues a Notification of Intention to Award (NOIA) to the selected Bidder(s). Thus, the "standstill period" starts. Copies of the NOIA are also sent to all other responsive Bidders with the evaluated conclusions for their Bids as well as that for the selected Bidder(s). This notification and standstill period allows time for the Recipient to provide debriefing to unsuccessful Bidders and for challenges from unsuccessful Bidders about the Recipient's selection. A contract cannot be awarded before the end of the standstill period and the resolution of any complaints. Complaints should be dealt with in accordance with Annex III of CDB’s Procurement Procedures.* 2. ***Document Retention:*** *In anticipation of debriefing or challenges or any post reviews by CDB, the Recipient should ensure that bidding documents and evaluations are securely stored.* 3. ***Bid Securities****: Bid securities of unsuccessful Bidders should be promptly returned after the award has been made. However, if Contract(s) effectiveness is contingent on the receipt of a performance security or other condition, the Recipient may consider seeking an appropriate extension of time for the Bid validity and the accompanying Bid security of the next lowest evaluated Bidder(s).*[[13]](#footnote-13) 4. ***Post Review:*** *For Contracts subject to post review, the Recipient may award the Contract upon completion of the evaluation. However, any doubts about the justification for the award should be raised by the Recipient with CDB before award signing. In addition, complete records shall be retained by the Recipient to be examined should CDB conduct a post review.* |

# Annex II. Bid Evaluation Summary Checklist

* Attach Bid opening record (refer to Tables 4A and B herein), if not previously submitted to CDB
* Provide details on eliminating any Bids during preliminary examination (Table 5). Copy selected pages from Bids, as required, as examples of objectionable features.
* Explain any substantial corrections for computational errors (refer to Table 6) that may affect the selection of Bidder(s).
* The additions, adjustments, and priced deviations in Table 9 require detailed explanations that may affect the selection of Bidder(s).
* Eligibility for a regional preference, as indicated in Table 10, must be double-checked if the selection of Bidder(s) is affected. Provide details in an attachment. Exclusions to the calculations for preference should be explained, if similarly significant.
* Explain any Conditional Discounts (Annex I, paragraph 3(k) herein) readout and recorded at the Bid opening. Also, attach copies of any BERs for the other related Contracts to be awarded to the same Bidder(s).
* Provide detailed reasons for ruling any Bid(s) nonresponsive.
* If Bid(s) for an Alternative(s) is accepted, provide a detailed explanation of the reasons for acceptance, addressing issues of timeliness, performance, and cost implications (Annex I, paragraph 3(m) herein).
* Attach copies of any correspondence from Bidders that raise complaints to the Bidding and evaluation process, together with the Recipient’s detailed responses.
* Attach copies of letters to Bidders requesting clarifications and copies of responses.
* Ensure that the BER-G11 is double-checked, paginated, and complete with a Letter of Transmittal. CDB will only review reports that are sent to it by the proper authorities.

1. *“Recipient” refers here to the entity which signed the Financing Agreement with CDB who may be represented by an implementing or executing agency, and which may also be called the “Purchaser”.*  [↑](#footnote-ref-1)
2. *For Goods subject to only national level advertising, national SPDs, acceptable to CDB, can also be used.*  [↑](#footnote-ref-2)
3. *See Procedures, Paragraphs 5.04 -5.07.* [↑](#footnote-ref-3)
4. *In the drafting of this Section, Annex II Bid Evaluation Summary Checklist herein should be considered.* [↑](#footnote-ref-4)
5. *Alternatively, a summary here and the full analysis in an Annex attached.* [↑](#footnote-ref-5)
6. *MAB = Bid that is substantially responsive to the Bidding Document, and the lowest evaluated cost.* [↑](#footnote-ref-6)
7. *Where Conditional Discounts are quoted by Bidder(s) an additional Table should be inserted here (11A) detailing the comparisons of discounted prices between Bidders. Conditional Discounts are further explained in Annex I Paragraph 3(k) herein.* [↑](#footnote-ref-7)
8. *Where Amount consists of more than one currency. footnote to define % in each currency.* [↑](#footnote-ref-8)
9. *Earlier disclosure of the evaluation outcomes will occur if the award is subject to a Standstill Period - Refer to paragraph 4(b) Standstill Period, below*. [↑](#footnote-ref-9)
10. *Electronic systems used by the Recipient for procurement require CDB NO before use.* [↑](#footnote-ref-10)
11. *For example, different materials or specifications.* [↑](#footnote-ref-11)
12. *The scope of the negotiations must be clearly defined in Section I of BER-G11.* [↑](#footnote-ref-12)
13. *Where applicable, this must be done before the Notice of Intention to Award (Procedures Section 6.91) is published.* [↑](#footnote-ref-13)