

**Bid Evaluation Report and Recommendation for Award of Contract (BER – G12)**

**Procurement of Goods and Related Services**

**One Stage – Two Envelopes (1+2)**

**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-2) *in italics throughout this template are also not included in the report.*
2. *With CDB's agreement, one-stage two envelopes (1+2) approach may be used when rated and monetary*[[2]](#footnote-3) *criteria are used to select Bidder(s) offering the Most Advantageous Bid(s)* ***(MAB/s)*[[3]](#footnote-4)***for the Goods[[4]](#footnote-5). The relative weight to be assigned to the rated criteria should generally not exceed thirty (30) percent of the total, with the price representing the balance of seventy (70) percent.*

*This**approach can be used with the Selection Methods* ***(SMs)*** *of International Competitive Bidding* ***(ICB)*** *and Regional Competitive Bidding* ***(RCB).*** *With appropriate modifications, it can be used for National Competitive Bidding* ***(NCB****) and Limited Bidding* ***(LB)*** *at an international/regional or national level for Goods****[[5]](#footnote-6)*** *including those involving:*

* + *Discrete Contracts and/or for Lots where an associated number of Contracts (Packages) may be awarded[[6]](#footnote-7)*
  + *A range of Contract types (unit price, lump sum, etc.)[[7]](#footnote-8)*
  + *Post-qualification of Bidders[[8]](#footnote-9)*

1. *Recipients are expected to use this Bid Evaluation Report (termed here* ***BER-G12)*** *for the situations described in point 2 above, and detailed as follows:*

* ***BER-G12-T (Technical)****: Both* ***Technical Bids (TBs)*** *and* ***Financial Bids (FBs)*** *are simultaneously submitted, under a one-stage process, but opened and evaluated sequentially. After establishing from the Preliminary Examination that the* ***TBs*** *are substantively responsive, the* ***TBs*** *are evaluated against selected technical evaluation criteria using a scoring matrix. Only those* ***TBs*** *that are `substantively responsive and meet/exceed a minimum technical score, where such is used, will be considered responsive.* ***BER-G12-T*** *is submitted for NO, where applicable.*
* ***BER-G12 – F (Financial)****: Upon NO of* ***BER-G12-T****, where applicable, the* ***FBs*** *of responsive Bidders, per* ***BER-G12-T****, are opened. The FBs are subject to Preliminary Examination and the Bid prices of financially responsive Bids are evaluated and then scored inversely to price. The scores of both the* ***TBs*** *and* ***FBs*** *are weighted, using the formula detailed in the bidding document, to provide a combined score, resulting in the selection,* *after qualifications checks, of Bidder(s) offering* ***MAB(s****).* ***BER-G12 - FT*** *is submitted for NO, where applicable.*

1. *The following CDB's Standard Procurement Documents* ***(SPDs****), policies, procedures and guidance notes shall govern the evaluation process:*
2. *When using* ***ICB*** *or* ***RCB*** *SMs, unless otherwise agreed with CDB, Recipients shall use CDB's prevailing Standard Procurement Documents* ***(SPDs****) for Goods - one stage-two envelopes. 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-G12****.*
3. *"Procurement Policy for Projects Financed by CDB," (****Policy****), dated November 2019.*
4. *"Procedures for Projects Financed by CDB"* ***(Procedures),*** *dated January 2021.*
5. *"Guidance Note on Bid Evaluation for Goods, Goods and Non-Consulting Services," June 2021* ***(GN)****.*
6. *"Guidance Note on Evaluation Criteria for the Procurement of Goods, Works and Non-Consulting Services"* ***December 2021(GN.1).***
7. *The* ***GN*** *and* ***GN.1*** *contain essential advice for evaluating Bids for Goods and thus should be used in conjunction with the* ***BER-G12****. Rather than duplicate aspects of* ***GN*** *and* ***GN.1*** *here, relevant* ***GN/GN.1*** *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* ***GN.1*** *with the* ***BER-G12****, the* ***BER-G12*** *will govern.*

***6.*** *The qualifications of Bidder(s) offering* ***MAB(****s) for the specific scope of Goods are to be evaluated, in accordance with* ***Section II,******Table 10 and Annex I, paragraph 3(l)*** *herein.*

***7****. Two* ***BER-G12s*** *are required to be completed.* ***BER-G12-T*** *for the Technical and* ***BER-G12-FT*** *for the Financial and combined with the Technical. The evaluation and each resulting* ***BER-G12*** *need not necessarily be lengthy. Contracts with a simple scope and low-value Contracts for Goods without regional preferences can usually be quickly and easily evaluated. The* ***BER-G12s*** *may be adapted to suit the specific requirements of the* ***SPD.*** *The* ***BER-G12s*** *should consist of any attachments to explain Bid evaluation details, borderline variances in a Bid ruled non-responsive by the Recipient or an unusual pricing structure. Cross-referencing should be used extensively, as well as references to pertinent* ***SPD*** *clauses.*

***8.*** *Recipients should study the* ***BER-G12****, including* ***GN*** *and* ***GN.1*** *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.*

***9.*** *The defined terms and acronyms in the* ***Policy*** *and* ***Procedures*** *are, where applicable, the same as those in this* ***BER-G12****. Also, cross-referencing to the* ***Policy and Procedures*** *and the* ***SPD*** *is used in this* ***BER-G12*** *to assist users.*

***10.*** *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)

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**Standard Cover**

**Bid Evaluation Report and Recommendation for Award of Contract**

**(BER-G12)**

**Goods**

**and**

**Related Services**

**One Stage – Two Envelopes**

Name of Project:

Project No.:

Contract Name:

Identification Number:

Date of Submission:

# Section I - Technical Evaluation Report

## Letter of Transmittal – Technical

*Where CDB's no objection (NO) is required for the evaluation results****[[9]](#footnote-10),*** *the* ***BER-G12-T*** *(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 bid evaluation 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. | Technical Evaluation Report - Text |
| Table 1. | Identification |
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*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-G12–T*** *and all supporting documentation shall be retained in the Recipient's project files for future review by CDB.*

## Technical Evaluation Report—Text[[10]](#footnote-11)

|  |  |
| --- | --- |
| 1. **Background** | *Include a brief description, context, scope, and objectives of the Goods.* |
| 1. **The Selection Process** | *Briefly describe the selection process, beginning with the advertising (if required) or establishing a limited list of Bidders.*  *Describe significant events that may have affected the timing (delays, key correspondence with CDB, the extension of Bid submission date, Addenda with significant changes to the bidding documents, etc.).* |
| 1. **Evaluation** | *Briefly describe the meetings and actions taken by the Bid Evaluation Committee* ***(BEC),*** *note any outside evaluation assistance, relevant correspondence with CDB; and compliance of evaluation with* ***ITB.***  *Summarise key results for Technical Bids* ***(TBs)*** *from* ***Tables 1-6A*** *including:*   * *Number of* ***TBs*** *and* ***FBs*** *received on time.* * *Provide specific reasons for* ***TBs*** *deemed non-responsive at Preliminary Examination -* ***Table 5*** *and those that are subsequently deemed non-responsive e.g., contains material deviation(s) or failing to meet scoring threshold, where applicable –* ***Table 6.*** * *Brief justification of technical criteria and sub-criteria and associated scoring as indicated in the* ***SPD.*** * *Observations to support scores including any key strengths and weaknesses of responsive Bidders.* * *Address impact, if any, of* ***TBs*** *with alternatives -* ***Option (b)******– Refer Table 5B.*** * *List items (if any) requiring further clarification or consideration in* ***FBs****’ evaluation****.*** * ***TB*** *evaluation results - complete the following table with* ***Table 6*** *scores for all Bidder(s). Include scores of Bidder(s)below the score threshold, if there is one, and whose* ***FBs*** *will not be opened.*  |  | | --- | | ***Adjust Table to reflect Bids on a Lot basis, where applicable*** |  |  |  | | --- | --- | | **Names of Bidders** | **Technical Score** | |  |  | |  |  | |
| 1. **Next steps[[11]](#footnote-12)** | *Develop schedules for the next stages in the evaluation process, i.e., CDB NO (where required), the time required to open* ***FBs,*** *evaluate and be ready to award Contract(s).* |

**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) Unit Price | Choose an item. |
| (c) Reimbursable – cost plus fees | Choose an item. |
| (d) Combinations of above |  |
| 1. Price Subject to adjustment |  |
| 1.11 Co-financing, if any: |  |
| * + 1. Agency name |  |
| * + 1. 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 (a) Prequalification [1] |  | |
| * + 1. Number of firms prequalified | Choose an item. | |
| * + 1. CDB NO of AER - G, 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 [2], if any |  | |
| * + 1. List all issue dates | Click or tap to enter a date. | |
| 2.7 Responses to Bidders’ requests for clarification on Bid documents [2] if any. List all dates | Click or tap to enter a date. | |
| 2.8 Date of pre-Bid conference, if any | Click or tap to enter a date. | |
| 2.9 Date minutes of conference sent to Bidders and CDB | Click or tap to enter a date. | |

***[1]*** *The selection of Bidders for most Contracts for Goods will be based on post-qualification. However, if prequalification is a condition, then this item and other aspects of* ***BER-G12–T*** *and will need appropriate adjustments – for an example refer to* ***BER-W12-T****.*

***[2]*** *Addenda and requests for clarification and responses should be attached to evaluation report.*

**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. Technical 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: Record of the Public Opening of Technical Bids and Readout

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

The following Technical and Financial Bids were submitted by the Bid submission deadline of *(tim*e) on *(date).* The Technical Bids 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][3][4]*** | **Bid Security Amount and Currency**  **(Y/N)** | **Bid Securing Declaration**  **(Y/N)** | **Financial Bid Received and suitably sealed/protected against early opening**  **(Y/N)** | **Signature of Bidder’s Representative *[5]*** |
|  | Choose an item. | Choose an item. | Choose an item. |  |
|  |  |  |  |  |

The following Bids were modified, or substitutes offered: *(Name and country of Bidder)* ***[6]***

The following Bids were withdrawn: *(Name and country of Bidder(s)* ***[7].***

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

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 ITB. Where electronic bidding is used, the system must be approved by CDB.*

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

***[3]*** *Where alternative Bids are permitted and Bids received, the relevant information should be read out and recorded in a new column – refer to comments in* ***Table 5B.***

***[4]*** *Add columns for Bids with multiple Lots. Where required, read out and record the information for each Lot separately.*

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

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

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

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

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

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

## Table 5: Summary of Preliminary Examination – Technical

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

|  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| |  |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | --- | | **Bidder**  ***(a)*** | **Verification**  ***(b)*** | **Eligibility**  ***(c)*** | **Bid Security/**  **Declaration**  ***(d)*** | **Completeness of Bid**  ***(e)*** | **Substantial Responsiveness**  ***(f)*** | **Acceptance for Detailed Evaluation**  ***(g)*** | |  |  |  |  |  |  |  | | *Notes:*   1. *For explanations of above headings and checklist for the technical and commercial Preliminary Examination of TBs – refer to:* 2. *Bidding documents defining conditions for responsiveness of Bids including those detailed in* ***Table 6.*** 3. *GN Section* ***– Preliminary Examination pages 8-13 and Annex III,******Table 5.*** 4. ***Table 5A herein.*** 5. ***Annex I paragraph 2, herein.*** 6. *Pertinent details from each evaluators’ examination are to be attached to this Table supporting the above consensus summary* ***[column (g)]****. A full explanation should be attached here of the ruling of any Bidder non-responsive.* 7. ***Alternatives*** *– refer* ***Table 5B.*** 8. ***TBs*** *that fail the preliminary examination are ruled non-responsive and do not proceed further in the evaluation process.* | | | | | | | |  | | | | | | | |  |

## Table 5A: Checklist for Technical Preliminary Examination and Evaluation

1. *This Checklist, using criteria for such in the* ***Sections III and IV*** *of the bidding documents, is the basis to conduct the Preliminary Examination of the* ***Completeness and Substantial Responsiveness*** *of the technical and commercial documentation of the* ***TBs*** *– this is generally a pass-fail assessment. The results are to be combined with the examination results in* ***Table 5.***
2. ***TBs*** *that are found to be responsive* *from the Preliminary Examination proceed to the Detailed Evaluation where the* ***quality and compliance*** *of* ***TBs*** *are evaluated in detail against the specifications and technical requirements in the bidding document, with such analysis attached to the evaluation report before table 6, and, assuming Bids are substantively technically responsive, they will then be* ***scored against the rated criteria*** *in the bidding documents. The evaluation results for the rated criteria are summarised in* ***Table 6.***
3. ***TBs*** *that are not responsive, either from the Preliminary Examination or Detailed Evaluation, are set aside and proceed no further.*

## Table 5B: Alternatives

*Normally, the selection of* ***MAB(s****) Bidder(s) will be on the base case requirements. However, Alternative case Bid(s) can be requested by the Recipient from Bidders and detailed in the bidding documents, using one of the following options:*

***Option (a) Bidders must bid on base case****. Alternative case Bids are only considered if from Bidder(s) whose Bid(s) for the base case was evaluated to offer the* ***MAB(s****). Therefore, only upon completion of the evaluation of the base case Bids* ***[Section II, Table 11]*** *is/are the Bidder(s) offering MAB(s) identified. If such Bidder(s) also Bid for Alternative case(s), the* ***TB(****s) is/are to be evaluated in the same way as the base case* ***TB(s****) through the process of* ***Section I Tables 5 through 6.*** *If the Alternative case* ***TB(s)*** *is/are technically acceptable, then the* ***FBs*** *will be evaluated in* ***Section II, Tables 4 through 11.*** *If the Alternative case Bid(s) offer(s) MAB(s) or fail(s) to offer MAB(s), the result will be added to* ***Section II Text and Table 11, if applicable.***

***Option (b)******A Bidder may submit a Bid for an Alternative case with or without a Bid for the base case.*** *All* ***TBs*** *received, including those for Alternative cases, shall be evaluated simultaneously on their own merits and the results reflected in* ***Section I (Tables 5 through 7).*** *All* ***TBs*** *that are evaluated as technically responsive proceed through the evaluation of* ***FBs*** *and results are reflected in* ***Section II Tables 1 through 11,*** *as applicable. Option (b) is the exception and a suitable justification would need to be made to and accepted by CDB.*

**Table 6: Summary of Technical Evaluation – Rated Criteria –Scores**

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

|  |  |  |  |
| --- | --- | --- | --- |
| **Criteria** | **Points per criterion** | **Bidder A**  **[Score]** | **Bidder B**  **[Score]** |
| **1.** |  |  |  | |
|  |  |  |  | |
| 2. |  |  |  | |
|  |  |  |  | |
| 3. |  |  |  | |
|  |  |  |  | |
|  |  |  |  | |
| **Total Scores** | **100** |  |  | |

1. *Only Bids accepted for detailed evaluation* ***[Table 5, column (g)]*** *should be included in this and subsequent Tables.*
2. *The above criteria and allocated points are to be those stated in the bidding documents.*
3. *Where a minimum score is stipulated in the bidding documents, Bids not achieving the minimum will be disqualified, and Financial Bids not opened.*
4. *Adjust Table to accommodate for Lots.*
5. *Score assigned to each Bidder are the Consensus/Averaged scores of all evaluators from* ***Table 6A.***

**Table 6A: Summary of Evaluators’ Scores - Rated Criteria**

***Scores/Ranking for each Bidder by each Evaluator***

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

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Name of Bidder** | | **Evaluator A** | **Evaluator B** | **Evaluator C** | **Consensus or Averaged Score** |
| **Criteria** | **Total Score** | **Scores** | **Scores** | **Scores** |  |
| **1.** |  |  |  |  |  |
|  |  |  |  |  |  |
| **2.** |  |  |  |  |  |
|  |  |  |  |  |  |
| **3.** |  |  |  |  |  |
|  | |  |  |  |  |
| **Total Technical Score** | |  |  |  |  |
|  | |  |  |  |  |
| **Rank** | |  |  |  |  |

1. *The above rateable criteria and allocated points are to be those stated in the bidding documents.*
2. *Each Evaluator is to complete a similar Table for each Bidder. Notes to be made on these Tables to support scoring, noted strengths and weakness, etc. These notes are to be attached to this Table.*
3. *The Consensus/Averaged scores are transferred to* ***Table 6.***
4. *Adjust Table to accommodate for Lots.*

## Table 7: Evaluation Certification

**Respectfully Submitted by the Evaluation Committee**

|  |  |  |  |
| --- | --- | --- | --- |
| **Name** | **Organisation/Position** | **Date** | **Signature** |
|  |  |  |  |
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|  |  |  |  |
|  |  |  |  |
| I confirm that the evaluation of the Technical Bids 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, Paragraph 6.37.    Chairperson's Name: Signature Date | | | |

*If (a) none of the Bids are found to be responsive, or (b) 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-G12*** *the proposed subsequent actions to address causes for the failed procurement.*

# Section II. Technical and Financial Evaluation and Award Recommendation—Text

## Letter of Transmittal – Financial and Award

|  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
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| *Where* ***BER-G12-T*** *is subject to CDB's prior no-objection* ***(NO),*** *the scheduling and opening of the Financial Bids* ***(FBs)*** *must not occur before the Recipient has received a* ***NO*** *to the* ***BER-G12-T*** *from CDB****.***  *The Technical evaluation (technical scores in particular) cannot be changed following the opening of the* ***FBs****.*  *Following the opening and evaluation of the* ***FBs*** *the composite* ***BER-W12-TF*** *is completed by the Recipient and where required submitted to CDB for* ***NO. Section I, Table 6 Technical,*** *complete with CDB's comments, shall be attached to* ***BER-W12-TF*** *as* ***Appendix I*** *and the other attachments**listed in the table below****.*** *The total package, plus this**Letter of Transmittal seeking* ***NO,*** *is sent from the Recipient (ministry, department, or agency) responsible for communications with CDB to the Operations Officer responsible for the Project.*  *Attachments to the Letter:*   |  |  |  |  | | --- | --- | --- | --- | | **Title** | **Description** | **Title** | **Description** | | Section II | Financial evaluation and Award Recommendation | Table 7 | [Additions, Adjustments, Priced Deviations](#_Toc68433679) and Conditional Discounts | | Table 1 | Identification and Financial Bid Opening | Table 8 | Regional Preference for Goods | | Table 2A | Record of Public Opening of Financial Bids and Prices Readout | Table 9 | Calculation of Technical and Financial Scores | | Table 2B | Attendance Sheet for the Public Opening of Bids | [Table 10](#_Toc68433680) | Qualification of Bidder(s) offering MAB(s) | | Table 3 | Preliminary Examination Financial | Table 11 | Proposed Award of Contract | | Table 4 | Corrections and Unconditional Discounts | Table 12 | Evaluation Certification | | Table 5 | [Exchange Rates](#_Toc68433677) | Appendix I | Table 6 Technical | | Table 6 | [Currency Conversion (Single or Multiple Currencies)](#_Toc68433678) |  |  |   *When the Contract is subject to post review, the same documentation as noted above, and all supporting documentation, shall be retained in the Recipient's project files for future review by CDB.* |

**Financial Evaluation Report and Award Recommendation—Text[[12]](#footnote-13)**

|  |  |
| --- | --- |
| 1. **Background** | *Include a brief description, context, scope, and objectives of the Goods.* |
| 1. **Financial Evaluation** | *Briefly describe (i) the meetings and actions taken by the Bid Evaluation Committee, (ii) any outside evaluation assistance, (iii) relevant correspondence with CDB, and (iv) compliance of evaluation with ITB.*  *Summarise key results from the financial evaluation [refer to* ***Tables 2 through 11]*** *including* ***(i)*** *reasons for any* ***FBs*** *found non-responsive at the Preliminary Examination or Detailed Evaluation stages thus ending the evaluation process for such Bidders* ***(ii****) Identify scope of Lots represented by Total Evaluated Prices* ***(TEPs) (iii)*** *Provide comments on the impact of Alternative Bids, Conditional Discounts[[13]](#footnote-14) and/or regional preference, if any, on the* ***TEPs,*** *Present the results of the evaluation of the* ***FB****s in the following Table*   |  |  |  | | --- | --- | --- | | **NAMES OF BIDDERS** | **TOTAL EVALUATED PRICES*[[14]](#footnote-15)*** | **SCORE** | |  |  |  | |  |  |  | |
| 1. **Combine Evaluation TBs and FBs** | *Address the award recommendations, cross-reference to* ***Table 10*** *(Qualification of Bidder(s) offering MAB(s) and* ***Table 11*** *(Proposed Award of Contract(s). List items (if any) requiring further financial negotiations with selected Bidder(s) (****refer to Procedures, Paragraph 6.60****). Present the results of the evaluation in the following table.*  **Combined Technical and Financial Evaluation[[15]](#footnote-16)**   |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | | **BIDDER** | **TECHNICAL** | | **FINANCIAL** | | **TOTAL SCORE** | |  | **Score** | **Weighted** | **Score** | **Weighted** |  | |  |  |  |  |  |  | |  |  |  |  |  |  | |
| 1. **Award of Contract** | *Include timing and actions to be taken to award the Contract(s) including, if applicable, accommodating the Standstill Period –* ***refer to Annex I paragraph 4(c)*** *herein.* |

**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 (a) Prequalification [1] |  | |
| * + 1. Number of firms prequalified | Choose an item. | |
| * + 1. CDB NO of AER - G, if required | Choose an item. | |
|  | Click or tap to enter a date. | |
| * 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 [2], if any |  | |
| * + 1. List all issue dates | Click or tap to enter a date. | |
| 2.7 Responses to Bidders’ requests for clarification on Bid documents [2] if any. List all dates | Click or tap to enter a date. | |
| 2.8 Date of pre-Bid conference, if any |  | |
| 2.9 Date minutes of conference sent to Bidders and CDB | Click or tap to enter a date. | |

***[1]*** *The selection of Bidders for most Contracts for Goods will be based on post-qualification. However, if prequalification is a condition, then this item and other aspects of* ***BER-G12–T*** *and will need appropriate adjustments – for an example refer to* ***BER-W12-T****.*

***[2]*** *Addenda and requests for clarification and responses should be attached to the evaluation report.*

**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. Technical 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 2A: Record of Public Opening of Financial Bids and Prices Readout

The following Financial 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)*** | ***Total Technical Score* *[3]***  ***(b)*** | **Read-Out Bid Price and Currency(ies) *[4]***  ***(c)*** | | **Read-Out Discount**  **[Unconditional] *[5]***  ***(d)*** | | **Total Bid Price**  **and**  **Currency(ies*) [4]***  ***(e)*** | **Signature of Bidder’s Representative *[6]***  ***(f)*** |
|  |  |  |  | **%** | **Amount** |  |  |
|  |  |  |  |  |  |  |  |

The following Bids were modified, or substitutes offered: *(Name and country of Bidder)* ***[7]***

The following Bids were withdrawn: *(Name and country of Bidder)* ***[8].***

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

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 ITB. Where electronic bidding is to be used, the system must be approved by CDB.*

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

***[3]*** *Scores for each Bidder per criterion [use attachments to detail] and the total score to be read out and recorded here, refer to* ***Section I*** *and* ***Table 6*** *of the Technical Evaluation Report.*

***[4]******(i)*** *Where an alternative Bid is permitted, and Bids received, the relevant information should be read out and recorded in a new column.* ***(ii)*** *Add columns for Bids with multiple Lots. Readout and record the information for each Lot separately* ***(iii)*** *Bid prices composed of several currencies. Each currency and amount shall be entered on a separate line for the Bidder.*

***[5]*** *Where Conditional Discounts* ***[CDs****] (refer* ***Annex I item 3(j)*** *herein) are offered, they shall be read out and recorded (in column added) but not included in* ***column (d).*** *These discounts shall be considered at* ***Table 7*** *stage.*

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

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

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

## Table 2B: 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** |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
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**Table 3: Preliminary Examination – Financial**

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

|  |  |  |  |
| --- | --- | --- | --- |
| **Bidder** | **Completeness of Bid** | **Substantial Responsiveness** | **Acceptance of FBs for Detailed Evaluation** |
| ***(a)*** | ***(b)*** | ***(c)*** | ***(d)*** |
|  |  |  |  |
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| --- |
| *Notes:*   1. *From the Preliminary Examination and Detailed Evaluation of* ***TBs******(Section I, Tables 5 and 6),*** *some commercial aspects (e.g. Bidder’s eligibility) were included for those Bidders reaching the evaluation of* ***FBs.*** *Nevertheless, the Preliminary Examination of* ***FBs*** *should reexamine these aspects and those under the above headings. The above includes for example: Letter of Bid signed by Authorised Signatory,* *Price Schedules included,* *Bid validity – duration as per the ITB.* 2. *Detailed Evaluation of* ***FBs*** *will only be conducted for those Bidders identified in* ***column (d)*** *above and reflected in* ***Tables 4 through 11.*** *If during any stage of the evaluation Bidders are found non-responsive, details shall be included as attachments to the applicable Table and summarised in* ***Section II, Financial Evaluation Report and Award Recommendation—Text.*** |
|  |

***If required, use a separate sheet to detail reasons for Bids passing or failing the Preliminary Examination.***

## Table 4: 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)*** |
|  |  |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |  |
| 1. *Only Bids accepted for detailed examination – refer to* ***Table 3, column (d)*** *should be included in this and subsequent Tables.* 2. *Columns (****a), (b), (c)*** *and (****h)*** *are from* ***Table 2A (columns a, c, and d, respectively).*** 3. ***(i)*** *Corrections in* ***column (d)*** *may be positive or negative. (ii)* ***Column (e) Provisional Sums*** *– generally not required for Goods. But where such are to be included in Bid Prices, then are to be deducted in* ***column (e).*** 4. ***(i)*** *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.* ***(ii)*** *Where Conditional Discounts are recorded in* ***Table 2A*** *[refer* ***Annex I paragraph 3(j) herein****], and where applicable****, they are to be addressed i****n* ***Table 7.***   ***For additional guidance, refer to GN Annex III Table 6*** | | | | | | | | |

**Table 5: Exchange Rates**[[16]](#footnote-17)

|  |  |
| --- | --- |
| 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 6: 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)*** |
|  |  |  |  |  |  |
|  |  |  |  |  |  |
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|  |  |  |  |  |  |

***Note****: (1)* ***Columns (a), (b) and (c)*** *are from* ***Table 4 - columns (a), (b) and (i) respectively.***

*(2****) Column (d) is from Table 5.***

*(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 7: Additions, Adjustments, Priced Deviations and Conditional Discounts[[17]](#footnote-18)

**Specify Evaluation Currency:**

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

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
| **Bidder** | **Total Bid Price** | **Additions** | **Adjustments** | **Priced Deviations** | **Total Evaluated Price (TEP)** | **Conditional Discounts** | **Revised TEP** |
| ***(a)*** | ***(b)*** | ***(c)*** | ***(d)*** | ***(e)*** | ***(f) = (b) + (c) + (d) + (e)*** | ***(g)*** | ***(h) = (f)-(g)*** |
|  |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |

1. ***Columns (a) and (b)*** *are from* ***Table 6, 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 to* ***Annex I paragraphs 3(f), (g) and (h) herein.***
3. *Where the bidding documents permit* ***Conditional Discounts*** *(****CDs****), and some or all Bidders have offered complying* ***CD****s, the impact on the Total Evaluated Prices* ***(TEP)******column (f))*** *is to be calculated. The results are to be recorded in* ***column (h).***
4. *Where the* ***CDs*** *involve the Contract/Lots under Contracts separately evaluated under other* ***BER-G12s,*** *this* ***Table 7*** *and the other applicable* ***Table(s) 7*** *are to be consolidated.*

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

## Table 8: Regional Preference for Goods

**Specify Evaluation Currency:**

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

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

***[1] Full details of the procedures can be found in Section III of*** *the bidding documents****.***

***[2] Column (b****) Bidders are categorised in one of* ***Groups A, B or C*** *– preference only applies to* ***Groups A and B Bidders.***

***[3] Column (c)*** *is the sum of costs in* ***column (h) Table 7.***

***[4] Column (d) per ITB 33*** *“Exclusions” should be supported with footnotes to explain.*

***[5]******Column (f)*** *is the applicable preference percentage not to exceed* ***15%,*** *per the bidding documents, to be applied to* ***Revised Total column (e)*** *for* ***Group C*** *Bidders;* ***Group A and B*** *Bidders addition is zero.*

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

***[7] Column (h)*** *determines the Bidder(s) offering* ***MAB(s).*** *Such Bidder(s****)*** *move(s) forward to post-qualification – refer* ***Table 10*** *[as described in* ***Annex 1 paragraph 3(l)*** *herein] and where Bidder(s) is/are qualified become the subject of* ***Table 11.***

*For additional guidance, refer to:* ***(i)******Annex I paragraph 3(i)*** *herein. (****ii)******Procedures. Paragraphs 6.52 and 6.53 and Annex 4;*** *and* ***(iii)******GN Page 17 -*** *Regional Preference for Goods Manufactured in the Borrowing Member Countries of CDB and Regional Preference for Works for Contractors from the Borrowing Member Countries of CDB.*

**Table 9: Calculation of Technical and Financial Scores**

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

**Table A: Technical Evaluation**

|  |  |
| --- | --- |
| **NAMES OF BIDDERS** | **SCORE*[[18]](#footnote-19)*** |
|  |  |
|  |  |
|  |  |
|  |  |

**Table B: Financial Evaluation**

|  |  |  |
| --- | --- | --- |
| **NAMES OF BIDDERS** | **TOTAL EVALUATED PRICE*[[19]](#footnote-20)*** | **SCORE** |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |

**Table C: Final Evaluation**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **BIDDER** | **TECHNICAL** | | **FINANCIAL** | | **TOTAL SCORE** |
|  | **SCORE** | **WEIGHTED** | **SCORE** | **WEIGHTED** |  |
|  |  |  |  |  |  |
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*Refer to* ***paragraph 8 and related Tables 2 to 5 of GN.1*** *to develop the required results***.** *The precise formula to be used for establishing the combined total score* ***(Table C above)*** *shall reflect that in the bidding documents.*

**Table 10: Qualification of Bidder(s) offering MAB(s)[[20]](#footnote-21)**

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

Using the post qualification criteria of the bidding documents, a brief narrative should be provided here of the results of the assessment of the Qualifications of the Bidder(s) offering MAB(s).

**Table 11: Proposed Award of Contract(s)**

*Where required, a separate Table is to be developed for each Lot*

|  |  |  |
| --- | --- | --- |
| 1. Bidder offering **MAB** |  | |
| 1. If Bid submitted by an agent, list actual Supplier(s). |  | |
| 1. If Bid from a JV, list all partners, nationalities, and estimated share of the Contract |  | |
| 1. Principal countries of origin of Goods/materials |  | |
| 1. Estimated date (month/year) of Contract signing. |  | |
| 1. Estimated completion period(s). |  | |
|  | **Currency** | **Amount** |
| A. Bid Price (Read-out) - ***Table 2A*** |  |  |
| B. Add Correction of Errors - ***Table 4 column (d)*** |  |  |
| C. Deduct Unconditional Discounts - ***Table 4, column (h)*** |  |  |
| D. Deduct Provisional Sums ***– Table 4, column (e)*** |  |  |
| **Corrected Bid Prices** ***– Table 4, column (i)*** |  |  |
| E. Add Additions - ***Table 7 column (c)*** |  |  |
| F. Add Adjustments -***Table 7 column (d)*** |  |  |
| G. Add Priced Deviations -***Table 7 column (e)*** |  |  |
| H. Deduct Conditional Discounts ***Table 7 column (g)*** |  |  |
| **Total Evaluated Price *-Table 7 column (h*)** |  |  |
| I. Deduct - ***items E[[21]](#footnote-22), F, G above*** |  |  |
| J. Add back any Provisional Sum(s) – ***item D above*** |  |  |
| **Proposed Contract(s) Award Amount(s)*[[22]](#footnote-23)*** |  |  |
| K. Budget |  |  |

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

***(1)******Alternatives (refer to Section I, Table 5B)*** *- Where* ***Option (a)*** *governs [i.e., Bidder now offering* ***MAB*** *against the base case and if quoted Alternative case(s)] such can be considered by the Recipient. The Alternative case Bid(s) are to be technically and financially evaluated at this time. Results to be added to applicable* ***Tables*** *in* ***Sections I and II****. If the Bid for Alternative, offers* ***MAB,*** *the results are to be shown in this* ***Table 11****.*

***(2)*** *Summarise here the results of the Qualification assessment of the* ***MAB*** *Bidder: ref* ***Table 10*** *and* ***Annex I para 3(l)*** *herein.*

***(3)*** *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 K),*** *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 NO). The Recipient should include with the* ***BER-G12******– TF*** *the proposed subsequent actions to address the causes for the failed procurement.*

## 

## Table 12: Evaluation Certification

**Respectfully Submitted by the Bid Evaluation Committee**

|  |  |  |  |
| --- | --- | --- | --- |
| **Name** | **Organisation/Position** | **Date** | **Signature** |
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|  |  |  |  |
| I confirm that the financial and the combined technical and financial Bid evaluations were conducted in full compliance with the CDB's Procurement Policy and 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 I: Evaluation Guide*

(This Guide applies both **Technical** **[TB]** and **Financial** **[FB]** Bids unless

expressly noted as applicable to only one)

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| ***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),*** * *Guidance Note on Evaluation Criteria for the Procurement of Goods, Works and Non-Consulting Services" December 2021(****GN.1)****, and* * *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[[23]](#footnote-24).*  ***(a) Bid Evaluation Committee (BEC)****: In accordance with* ***Procedures Paragraph 6.37,*** *CDB requires the appointment by the Recipient of a* ***BEC*** *consisting of a minimum of three qualified members.*  *There might be a considerable advantage if the* ***BEC*** *members participated in the preparation of the bidding documents.*  *All* ***BEC*** *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[[24]](#footnote-25).*  ***(b) 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.* |
| ***2. Preliminary Examination of Bids*** | *Preliminary Examination is the first step in the evaluation process of both the* ***TB*** *and* ***FB*** *from each Bidder. This determines the compliance of a Bidder and its Bid by examining the following categories[[25]](#footnote-26): and the results are to be reflected in* ***TB -******Tables 5 and 5A,******FB - Table 3.***   * *Verification* * *Eligibility* * *Bid Security or Bid Securing Declaration (TB)* * *Completeness of Bid* * *Substantial Responsiveness; and* * *Acceptance for Detailed Evaluation.*   *Major deficiencies such as a Bidder bidding for part quantities of Goods, where such is not allowed, would set the Bid aside as non-responsive.*  *The duration of the validity of each Bid should be the one specified in the ITB and should be confirmed by the Bidders in the signed Letter of Bid. If exceptional circumstances occur in which a contract 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* ***Sections I and II,*** *as applicable.* |
| ***3. Detailed Evaluation of Bids*** | *Only those* ***TBs*** *and* ***FBs t****hat pass the Preliminary Examination then proceed to Detailed Evaluation, against the specifications and other conditions in the bidding documents. The following are provided to assist in both the evaluation of* ***TBs*** *and* ***FBs*** *and noted accordingly.*   * + 1. ***Modifications [TB and FB]:*** *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 Preliminary Examination and Detailed Evaluation of the Bids.*     2. ***Technical Evaluation (TB):*** *The details of the technical evaluation and the results are to be included in* ***Section I****,* ***Table 6, and Text****. In addition, where technical issues have financial impacts such as some listed below, e.g., Alternative Bids, there must be consistency in the applicable financial Tables.*     3. ***Unconditional Discounts (FB):*** *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* ***FB*** *opening and reflected in the Bid price in* ***Section II,******Table 4 Column (h).*** *The effect of unconditional discounts (or increases) must be applied to the appropriate base specified in the bidding documents.*     4. ***Corrections for computational Errors (FB and TB)****: The methodology for correcting computational errors is described in the* ***ITB.*** *The readout Bid prices and their corrections should be noted in* ***Section II,******Table 4****,* ***column (d).*** *The sums are to be included both in the evaluated prices and contract award price. The corrections are considered binding on the Bidder.*     5. ***Evaluation Currency (FB):*** *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* ***Section II****,* ***Table 5.*** *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.* ***Section II,******Table 6*** *is to be adjusted in this case.*     6. ***Additions (TB and FB):*** *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* ***Section II,******Table 7, column (c)*** *for Bid comparison purposes. Should Bidder(s) offering the* ***MAB(s)*** *be subject to the estimated costs of Additions, then such costs will be the subject of pre-award negotiations – refer* ***Section II, Table 11.***     7. ***Adjustments (FB):*** *The bidding documents will define what Adjustments, if any, can be made and the formula to develop the cost impact to be considered in the Bid evaluation. Some examples include life cycle cost –* ***[refer GN.1 and 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 Section II,******Table 7, column (d).***     8. ***Priced Deviations [TB and FB]****: Deviations can be noted in* ***TBs*** *or* ***FBs*** *or both. The bidding documents will define what Deviations can be made and the formula to develop the cost impact to be considered in the Bid evaluation* ***(refer GN.1****). 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 Section II, Table 7, column (e).***     9. ***Regional Preference (FB)****: 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* ***Section II,******Table 8*** *herein,* ***Procedures, Paragraphs 6.52 and 6.53, and Annex 4.*** *The impact of the preference will be reflected in* ***Section II, Table 8 Column (h).***     10. ***Conditional Discounts (FB):*** *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 the ITB conditions. 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 in* ***Section II, Tables 7, 9, 10 and 11*** *with applicable attachments to provide details of calculations and decisions and all summarised in* ***Section II Text,*** *which should include the Bid evaluation(s) for the other Contracts if they have been evaluated separately.*   * + 1. ***Bids for Alternatives (TB and FB)****: The bidding documents may request or allow the Recipient to accept Bids for Alternatives*[[26]](#footnote-27)*. The conditions for the two options for Alternatives are stated in Section I* ***Table 5B and Section II Table 11.*** *The results of the evaluation and acceptance or rejection of Alternatives will be reflected in the applicable* ***Tables of Sections I and II.***     2. ***Qualification (TB and FB):*** *Prior to finalising the selection of the Bidder(s) offering the MAB(s), the Recipient must assess the current qualifications of the Bidder(s) on a pass/fail basis (****refer GN.1).*** *This is based on Bidders' information submitted with the Bid(s) to meet financial, technical, experience criteria required by the bidding documents. The results are to be added to* ***Table 10 and Section II Text.*** *If Qualifications are acceptable, Bidder proceeds to Contract Award* ***(Table 11)*** *if not, Bid set aside as non-responsive.* |
| ***4. Contract Award*** | * + 1. ***Contract award****: For contracts subject to CDB's No Objection (NO), the* ***BER-G12-FT*** *should be submitted to CDB preferably no later than* ***three (3) weeks*** *before the expiration of the validity of the Bid(s).*     2. ***Negotiations [TB &FB]****: Once CDB's NO is received of* ***BER-G12 - FT****, the Recipient can negotiate with the selected Bidder****[[27]](#footnote-28).*** *Where negotiations take place, a draft Contract initialled by the Supplier 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 is received for the* ***BER-G12 - FT*** *then the Contract can be awarded.* * *Once the Contract awarded, and CDB is advised, and the Contract is subject to prior review, then CDB will publish a* ***Contract Award Notice (CAN)*** *with a description of the Contract(s), the name and nationality of the Contractor(s), and the Contract price(s)****.*** *Where NO is not required, then the Recipient will publish a similar* ***CAN******(****refer -* ***Procedures Paragraph 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-G12 -TF*** *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 time 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* ***[see (f) below****], the Recipient should ensure that bidding documents and evaluations are securely stored.*     3. ***Bid Securities [FB]****: Bid securities of unsuccessful Bidders should be promptly returned after the award has been made. However, if the effectiveness of the Contract(s) 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 Bidder(s)*[[28]](#footnote-29)*.*     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* ***Section I Tables 4A and 4B and Section II, Tables 2A and 2B, herein),*** *if not previously submitted to CDB.*
* *Provide details on eliminating any* ***TBs*** *or* ***FBs*** *during Preliminary Examinations* ***(Section I TB- Table 5 and Section II, FB -Table 3).*** *Copy selected pages from Bids, as required, as examples of objectionable features.*
* *Explain any substantial corrections for computational errors (refer to* ***Section II,******Table 4)*** *that may affect the selection of Bidder(s).*
* *The Additions, Adjustments, and Priced Deviations in* ***Section II,******Table 7*** *require detailed explanations that may affect the selection of Bidder(s).*
* *Eligibility for a regional preference, as indicated in* ***Section II,******Table 8****, must be double-checked if the selection of Bidder(s) offering MAB(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(j) herein and Section II, Table 7)*** *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) non-responsive during Detailed Evaluation of* ***TBs*** *or* ***FBs.***
* *If Bid(s) for an Alternative(s) is/are accepted, provide a detailed explanation of the reasons for acceptance, addressing issues of timeliness, performance, and cost implications* ***(Refer Section I, Table 5B and Section II, Table 11 and Annex I, paragraph 3(k) 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-G12- T and FT*** *are 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-2)
2. *Further details of the application of non-price criteria can be found in* ***GN.1*** [↑](#footnote-ref-3)
3. ***MAB(s)*** *- Most Advantageous Bid(s) – Bid(s) substantially responsive to the Bidding Documents, and at the lowest evaluated cost.* [↑](#footnote-ref-4)
4. *The term Goods throughout this* ***BER-G12*** *includes “Related Services” for example, transportation, insurance, installation, commissioning, training, or initial maintenance*. [↑](#footnote-ref-5)
5. *For Goods subject to only national-level advertising, national* ***SPD****s, acceptable to CDB, can also be used.*  [↑](#footnote-ref-6)
6. *Refer* ***Table 7*** *and* ***Annex I herein, paragraph 3(j).*** [↑](#footnote-ref-7)
7. *Refer* ***Table 1*** *herein and* ***Procedures Paragraph 7.33*** [↑](#footnote-ref-8)
8. *Refer* ***Section II, Table 10,******Procedures****, Paragraphs* ***7.12-7.14, and*** ***Annex I paragraph 3(l)*** *herein.* [↑](#footnote-ref-9)
9. *See* ***Procedures, Paragraphs 5.04 -5.07.*** [↑](#footnote-ref-10)
10. *In the drafting of this Section,* ***Annex II Bi****d Evaluation Summary Checklist herein should be considered.* [↑](#footnote-ref-11)
11. *Refer to* ***Table 7*** *for guidance if no Bidders are responsive. Add plans here to address, where required.* [↑](#footnote-ref-12)
12. *In the drafting of this Section,* ***Annex II Bid Evaluation Summary Checklist*** *herein should be considered.* [↑](#footnote-ref-13)
13. *Include the Bid evaluation(s) for the other Contracts to be awarded to the same Contractor(s) if they have been evaluated separately.* [↑](#footnote-ref-14)
14. *From* ***column (f) of Table 7 and Table 9.*** [↑](#footnote-ref-15)
15. ***From Table 9.*** [↑](#footnote-ref-16)
16. *Refer to* ***Annex I, Paragraph 3(e)*** *herein.*  [↑](#footnote-ref-17)
17. ***CDs*** *are to be calculated in accordance with* ***ITB 14.6, ITB 34.4, and Section III “Multiple Contracts” of the bidding documents.*** [↑](#footnote-ref-18)
18. *From Technical Evaluation,* ***Section I Table 6*** [↑](#footnote-ref-19)
19. *From* ***column (f) or (h),*** *depending on the applicability of* ***CD****s, of* ***Table 7*** [↑](#footnote-ref-20)
20. *Refer* ***Annex I paragraph 3(l)*** [↑](#footnote-ref-21)
21. *Add estimate of costs to be negotiated with Bidder(s) – to be added to price of Contracts, where applicable.* [↑](#footnote-ref-22)
22. *Where Amount consists of more than one currency, provide a footnote to define % in each currency.* [↑](#footnote-ref-23)
23. *Earlier disclosure of the evaluation outcomes will occur if the award is subject to a Standstill Period - Refer to paragraph* ***4(c) Standstill Period,*** *below.* [↑](#footnote-ref-24)
24. *Electronic systems used by the Recipient for procurement require CDB NO before use.* [↑](#footnote-ref-25)
25. *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.*** [↑](#footnote-ref-26)
26. *For example, different materials or specifications.* [↑](#footnote-ref-27)
27. *The scope of the negotiations must be clearly defined in* ***Section II Text of the******BER-G12- TF and Table 11.*** [↑](#footnote-ref-28)
28. *Where applicable, this must be done before the* ***Notice of Intention to Award******(Procedures Section 6.91****) is published.* [↑](#footnote-ref-29)