A picture containing text, gambling house, room

Description automatically generated

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

**(BER – G22)**

**Two Stages – Two Envelopes (2+2)**

**Procurement of Goods**

**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, a two stages two envelopes (2+2) approach may be used for some particular procurement circumstances, including: (i) the purchase of complex or innovative Goods for which the Recipient is seeking customised design and/or innovative solutions from Bidders; (ii) when the need for innovation in technical offering or solution is paramount (iii) it is impractical or not efficient to prepare complete technical specifications in advances, due to the particular nature of the procurement, such as information communications technology subject to rapid technological change, or (iv) competition among prequalified Bidders for the technical offering or solution is desirable due to the benefits in availing of better technological solutions and lower life cycle costs.*
3. *Under a two stages two envelopes process, Qualified Bidders are requested to Bid, and the Recipient, using pass/fail, rated and monetary*[[2]](#footnote-3) *criteria, selects the Bidder(s) offering the Most Advantageous Bid(s)* ***[MAB(s)]*[[3]](#footnote-4)***for the Goods. The relative weight 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****.*
4. *This**approach****[[4]](#footnote-5)*** *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.*
5. *Generally, under this approach, Bidders will be prequalified by the Recipient, and the resulting list of prequalified Bidders is the basis for this* ***BER-G22****. The prequalification results are summarised in the Applicants’ Evaluation Report for Goods* ***(AER-G****) completed by the Recipient. However, at* ***Stage I******(Table 6B****) and at* ***Stage II******(Table 10)*** *for Bidder(s) offering* ***MAB(s)******,*** *some of these Qualifications [defined in the bidding documents] will need to be reassessed - refer to* ***Procedures, Paragraphs 7.12-7.13 and Annex I paragraph 3(j) herein.*** *In case post-qualification of Bidders is used instead – refer to Procedures, Paragraph 7.14, then this report will require adjustments.*
6. *Recipients are expected to use this Bid Evaluation Report (termed here* ***BER-G22****) for situations described in point 2 above, in the following sequence:*

* ***BER-G22-PTB:*** *for* ***Stage I*** *– Evaluation of Preliminary Technical Bids* ***[PTBs]*** *- Prequalified Bidders submit* ***PTBs*** *without any financial offer included****.*** *The Recipient conducts the following steps, against criteria stated in the bidding documents:*
  + *Preliminary Examination* ***(PE)*** *of all* ***PTBs****. Responsive* ***PTBs*** *proceed to next step.*
  + *Detailed Evaluation* ***(DE)*** *of responsive* ***PTBs*** *from* ***PE.*** *Bidders found responsive are invited to submit Final Technical Bids* ***(FTBs)*** *and Financial Bids* ***(FBs****) for* ***Stage II.***
* ***BER-G22-FTB:*** *for* ***Stage IIA, Final Technical Bids [FTBs] and Financial Bids [FBs]*** *are simultaneously submitted by Bidders (selected from* ***Stage I****) but opened and evaluated sequentially.* ***FTBs*** *are opened first, and the Recipient conducts the following steps, against criteria stated in the bidding documents:*
  + ***PE -****substantially responsive* ***FTBs*** *are identified.*
  + ***DE -*** *of all responsive* ***FTBs*** *covering any pass/fail criteria and scores against ratable criteria.*
  + ***FTBs*** *- that meet/exceed a minimum score, where applicable, proceed to open* ***FBs.***
* ***BER-G22-FT: Stage IIB:*** *award of Contract(s) recommendation(s). The* ***FBs*** *of responsive Bidders, per* ***BER-G22-FTB****, are opened, and the Recipient conducts the following steps, against criteria stated in the bidding documents:*
  + ***PE –*** *identification ofthose* ***FBs*** *that are substantially responsive.*
  + ***DE*** *- all responsive* ***FBs*** *including* ***FTB*** *scores are inversely scored to the price.*
  + *Identification of Bidder(s) offering* ***MAB(s)*** *and finalisation of assessment of Qualifications*
  + *Recommendation for award of Contract(s).*

***Where CDB’s NO is required, each of the three BER-G22s will be submitted to CDB for prior review. The Recipient will not proceed to the next activity until NO is received.***

1. *The following CDB’s Standard Procurement Documents (****SPDs),*** *policies, procedures, guidance notes and other documents shall govern* *and/or guide the evaluation process:*
2. *When using* ***ICB*** *or* ***RCB SMs,*** *unless otherwise agreed with CDB, Recipients shall use CDB’s prevailing* ***SPDs*** *for Goods - two stage-two envelopes. The* ***SPD i****ncludes 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-G22****.*
3. *For Goods subject to only national-level advertising, national SPDs, acceptable to CDB, can also be used.*
4. *The “Procurement Policy for Projects Financed by CDB” (****Policy****), dated November 2019.*
5. *The “Procedures for Projects Financed by CDB”* ***(Procedures),*** *dated January 2021.*
6. *The “Guidance Note on Bid Evaluation for Goods, Works and Non-Consulting Services”* ***(GN)****, dated June 2021****.***
7. *The “Guidance Note on Evaluation Criteria for the Procurement of Goods, Works and Non-Consulting Services”* ***(GN.1)****, dated December 2021.*
8. *The* ***BER-B22*** *and* ***Annexes I and II.***
9. *Where applicable, the results of the Bidders’ Applications to Prequalify, summarised in the Applicants’ Evaluation Report for Goods* ***(AER-G****), shall be considered – see item 3 above.*
10. ***GN*** *and* ***GN.1*** *contain essential advice for evaluating Bids for Goods and can be used with the* ***BER-G22s****. Rather than duplicate aspects of* ***GN*** *and* ***GN1*** *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* ***GN*** *or* ***GN.1*** *with the* ***BER-G22,*** *the* ***BER-G22*** *will govern.*
11. *Three* ***BER-G22s*** *are required to be completed, namely* ***BER-G22-PTB, BER-G22-FTB*** *and* ***BER-G22-FT.*** *Each* ***BER-G22*** *need not necessarily be lengthy. The* ***BER-G22s*** *can be adapted to suit the specific requirements of the* ***SPDs.*** *They can include 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.*
12. *Recipients should study the* ***BER-G22****, including* ***GN and GN.1*** *during project preparation, to properly assess the managerial and administrative conditions needed for the 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 in the Financing Agreement.*
13. *The defined terms and acronyms in the Procedures are, where applicable, the same as those in this* ***BER-G22****. Also, cross-referencing to the Procedures and the* ***SPD*** *is used in this* ***BER-G22*** *to assist users.*
14. *To obtain further information on procurement under CDB-financed projects, contact:*

*Procurement Policy Unit*

*Caribbean Development Bank*

*PO 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 – G22)**

**Two Stages – Two Envelopes (2+2)**

**Procurement of Goods**

Name of Project:

Project No.:

Contract Name:

Identification Number:

Date of Submission:

# **Stage I: Preliminary Technical Bid (PTB)**

## **Letter of Transmittal–PTB**

*If the Contract is subject to prior review[[5]](#footnote-6), the* ***BER-G22-PTB*** *should be attached to 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. Also, any unresolved or potentially contentious issues should be highlighted. The letter should be sent to the CDB Operations Officer responsible for the Project.*

*Note: Attachments to this letter should include:*

|  |  |
| --- | --- |
| Stage I | Preliminary Technical Bid (PTB) Evaluation Report—Text |
| Table 1. | Identification - PTB |
| Table 2. | Bidding Process - PTB |
| Table 3. | PTB Submission and Opening |
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| Table 6 | Detailed Evaluation – Summary Results |
| Table 6A | DE PTB – Evaluators’ Results |
| Table 6B | Evaluation of Qualifications by Evaluators |
| Table 7 | Evaluation Certification |

*Where the Contract is subject to post review, the* ***BER-G22 - PTB*** *and all supporting documentation shall be retained in the Recipient’s project files for possible future review by CDB.*

## **Stage I: Preliminary Technical Bid (PTB) - Evaluation Report—Text[[6]](#footnote-7)**

|  |  |
| --- | --- |
| 1. **Background** | *Include a brief description, context, scope, and objectives of the Goods. Explain the rationale for the use of the 2-stage 2-envelope approach.* |
| 1. **The Selection Process** | *Briefly describe the selection process, beginning with the establishment of the list of prequalified Bidders, if appropriate.*  *Include details of 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. **Technical Evaluation** | *Summarise the meetings and actions taken by the Bid Evaluation Committee* ***(BEC)****; note any outside assistance employed in the evaluation; refer to relevant correspondence with CDB, and compliance of evaluation with bidding documents****.***  *Detail the key evaluation results for Preliminary Technical Bids* ***(PTBs)*** *from Tables 1-6, including:*   * *Number of PTBs invited, and number received.* * *Outline and justify any technical criteria and sub-criteria, consistent with the bidding documents, developed by the* ***BEC*** *to assist in Preliminary Examination* ***(PE)*** *and Detailed Evaluation* ***(DE).*** * *Provide specific reasons for* ***PTBs*** *deemed non-responsive at* ***PE*** *-* ***Table 5*** *and* ***DE - Table 6.*** * *Observations on any key strengths and weaknesses of responsive Bids.* * *Address impact, if any, of Alternatives**offered in* ***PTBs.*** * *Summarise the results of the meetings with responsive Bidders (to be invited to submit* ***Final Technical and Financial Bids******(FTBs*** *and* ***FBs)*** *for* ***Stage II****) that will result in the issue at* ***Stage II*** *of a memorandum “Changes Required Pursuant to First Stage Evaluation” (hereinafter the* ***Memorandum).*** * ***PTB*** *evaluation results - complete the following table from* ***Table 6.***  |  |  |  | | --- | --- | --- | | **Names of Bidder** | | **Responsive [yes/no]** | |  |  | | |  |  | | |
| 1. **Stage 2[[7]](#footnote-8)** | *Develop a schedule for* ***Stage II,*** *including the Opening of Final Technical Bids* ***(FTBs)*** *and Financial Bids (****FBs****) and complete evaluation of* ***Stage II.*** |

## 

## **Table 1: Identification –** **Preliminary Technical**

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

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

|  |  |
| --- | --- |
| 1.1 Name of Recipient |  |
| 1.2 Financing Agreement reference |  |
| 1.3 Date of Effectiveness | Click or tap to enter a date. |
| 1.4 Terminal Disbursement Date  (a) original  (b) revised | Click or tap to enter a date.  Choose an item.  Click or tap to enter a date. |
| 1.5 Purchasing Entity  (a) Name  (b) Address |  |
| 1.6 Cost Estimate/Budget *(1)* |  |
| 1.7 Selection Method | Choose an item. |
| 1.8 CDB Prior Review Required/NO *(2)* | Choose an item. |
| 1.9 Regional preferences allowed | Choose an item. |
| 1.10 Contract Type  (a) Lump Sum | Choose an item. |
| (b) Other: quantity supplied/work done (3) | Choose an item. |
| (c) Price subject to adjustment | Choose an item. |
| 1.11 Co-financing, if any:  (a) agency name  (b) percent financed by agency |  |
| *(1)**Use amount stated in the Procurement Plan.*  *(2) If response is “No” all items below which reference CDB NO shall be “Not applicable”*  *(3) Refer ITB 30.1* | |

## **Table 2: Bidding Process – Preliminary Technical**

|  |  |  |
| --- | --- | --- |
| 2.1 General Procurement Notice  (a) first issue date  (b) latest update | Click or tap to enter a date.  Click or tap to enter a date. | |
| 2.2 (a) Prequalification |  | |
| (b) number of firms prequalified | Choose an item. | |
| (c) CDB NO of AER-G, if required | Choose an item. | |
| 2.3 Specific Procurement Notice – Names[[8]](#footnote-9), of publication media and duration | **NAME** | **DURATION** |
| (a) National |  |  |
| (b) International/regional |  |  |
| (c) Gazette |  |  |
| (d) Website(s) |  |  |
| 2.4 Standard Procurement Document  (a) title, publication date  (b) date of CDB’s no-objection  (c) date of issue to Bidders | Click or tap to enter a date.  Click or tap to enter a date.  Click or tap to enter a date. | |
| 2.5 Number of Bidders issued documents |  | |
| 2.6 Addenda[[9]](#footnote-10) to documents, if any  (a) list all issue dates  (b) date(s) of CDB’s no-objection | Click or tap to enter a date.  Click or tap to enter a date. | |
| 2.7 Responses to Bidders’ requests for clarification on Bid documents if any.  (a) list all issue dates  (b) date(s) of CDB’s no-objection | Click or tap to enter a date.  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. | |

## **Table 3: Preliminary Technical Bid Submission and Opening**

|  |  |
| --- | --- |
| 3.1 Bid submission deadline |  |
| (a) original date and time | Click or tap to enter a date. Time: |
| (b) extensions, if any | Click or tap to enter a date. Time: |
| 3.2 Bid opening date and time | Click or tap to enter a date. Time: |
| 3.3 Record of Bid opening - date of submission to CDB *(1)* | Click or tap to enter a date. |
| 3.4 Number of PTBs submitted/opened |  |
| *(1)* *Tables* ***4A*** *and* ***4B*** *are to be used for this purpose.* | |

## **Table 4A: Stage 1 – Record of the Public Opening of PTBs and Read-out**

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 location of public Bid opening* ***[1])*.**

|  |  |  |  |
| --- | --- | --- | --- |
| **Name and Country of Registration of**  **Bidder *[2]*** | **Base PTB**  **Yes/No** | **Alternative PTB *[3]***  **Yes/No** | **Signature of Bidder’s**  **Representative *[4]*** |
|  | Choose an item. | 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 ***[7]*** Name, Designation and Signature Name, Designation and Signature*.*

***[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]*** *For Bidders that are a Joint Venture, the names, and countries of all the parties to the joint venture should be read out and recorded.*

***[3]*** *Where PTBs for Alternatives are permitted, and Bids received, the relevant information should be read out and recorded in a new column.*

***[4]*** *In the case of a Bidder that is a joint venture, 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 only advised of the withdrawal, with no other information.*

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

***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: Summary of Preliminary Examination [PE]– PTB**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| ***Bidder***  ***(a)*** | ***Verification***  ***(b)*** | ***Eligibility***  ***(c)*** | ***Completeness of Bid***  ***(d)*** | ***Substantial Responsiveness***  ***(e)*** | ***Acceptance for Detailed Evaluation***  ***(f)*** |
|  |  |  |  |  |  |

1. *For explanations of the above headings and checklist for the technical and commercial Preliminary Examination* ***(PE)*** *of* ***PTBs*** *– 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. ***Qualifications*** *– compliance of documentation –* ***refer Table 6B*** *and* ***Annex I paragraph 3(j) herein].***

***(2)*** *Additional headings/columns may be needed, such as for responsiveness to technical conditions or sustainable procurement.*

***(3) Alternatives*** *– where such are included in* ***PTB(s),*** *either instead of or in addition to the base case, the* ***PE*** *should cover both cases and the results addressed in* ***Tables 5 and 5A.***

***(4)*** *Pertinent details from each evaluators’* ***PE******(Table 5B)*** *are to be attached to this* ***Tabl****e supporting the above consensus summary* ***[column (f)]****. A full explanation should be attached here of the ruling of any Bidder as non-responsive.*

***(5) PTBs*** *that fail the* ***PE*** *are ruled non-responsive and do not proceed further in the evaluation process.*

**Table 5A: Checklist for Technical Preliminary Examination**

|  |  |  |
| --- | --- | --- |
| **Category of Documentation (Example)** | **Bidder’s Name** | **Bidder’s Name** |
| 1. Base case - conformity of the Goods with specified functions/performance. | Documents adequate Y/N | Documents adequate Y/N |
| 1. Alternative Bids (in lieu of, or in addition to, Base Case) and conformity, as above. | Documents adequate Y/N | Documents adequate Y/N |
| 1. Design and production approach/methodology and quality assurance. | Documents adequate Y/N | Documents adequate Y/N |
| 1. Supplier’s organisation and Key Personnel. | Documents adequate Y/N | Documents adequate Y/N |
| 1. Subsuppliers and subcontractors added or changed from prequalification time. | Documents adequate Y/N | Documents adequate Y/N |
| 1. Manufacturer’s Authorisation[s] | Documents adequate Y/N | Documents adequate Y/N |
| 1. Commitments from key Subcontractors and Subsuppliers | Documents adequate Y/N | Documents adequate Y/N |
| 1. Schedule | Documents adequate Y/N | Documents adequate Y/N |
| 1. Departures concerning the contractual terms and conditions | Documents adequate Y/N | Documents adequate Y/N |
| 1. Other evaluation criteria in bidding documents (e.g., Sustainable Procurement, innovation, update on qualifications, etc.) | Documents adequate Y/N | Documents adequate Y/N |
| **Overall results of Preliminary Examination** | **Pass/Fail** | **Pass/Fail** |

1. *This Checklist is used to conduct the* ***Verification*** *and examine the* ***Completeness, and Substantial Responsiveness*** *of the documentation in* ***PTBs*** *– a pass/fail assessment. The results are to be combined with the other* ***PE*** *results in* ***Table 5 and Table 6B.***
2. ***PTBs*** *that are found to be responsive proceed to the Technical Detailed Evaluation* ***(DE)*** *that will consider the qualitative nature**against these documents based on the criteria in the bidding documents. The* ***DE*** *results are summarised in* ***Table 6.***
3. *The above* ***Category of Documentation*** *shall be adjusted, as necessary, to be consistent with the technical requirements defined in the bidding documents.*

## **Table 5B: Preliminary Examination – Evaluators’ Results**

**Name of Evaluator:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Bidder**  ***(a)*** | **Verification**  ***(b)*** | **Eligibility**  ***(c)*** | **Completeness of Bid**  ***(d)*** | **Substantial Responsiveness**  ***(e)*** | **Acceptance for Detailed Evaluation**  ***(f)*** |
|  | Pass/Fail | Pass/Fail | Pass/Fail | Pass/Fail | Pass/Fail |
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|  |  |  |  |  |  |
| *Details of* ***PE*** *results, especially for non-compliances, should be provided here or in additional sheets* | | | | | |

1. *Each Evaluator (of the Bid Evaluation Committee) completes this Table for all Bidders. The consensus* ***PE*** *results are to be entered in* ***Table 5.*** *The notes of each Evaluator are attached to their* ***Table 5As,*** *and in turn, these are attached to* ***Table 5.***

## **Table 6: Detailed Evaluation – Summary Results*[[10]](#footnote-11)***

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Name of Bidder:** | **Evaluator A** | **Evaluator B** | **Evaluator C** | **Evaluator D** |
| **Example Criteria** | **Meets specification** | **Meets specification** | **Meets specification** | **Meets specification** |
| 1. Proposed Goods | Yes/No | Yes/No | Yes/No | Yes/No |
|  |  |  |  |  |
| 2. Performance | Yes/No | Yes/No | Yes/No | Yes/No |
|  |  |  |  |  |
| 3. Approach and Methodology | Yes/No | Yes/No | Yes/No | Yes/No |
|  |  |  |  |  |
| 4. Any other criteria, as appropriate. | Yes/No | Yes/No | Yes/No | Yes/No |
|  |  |  |  |  |
| **Results of Qualification Assessment (***from* ***Table 6B)*** | Pass/Fail | Pass/Fail | Pass/Fail | Pass/Fail |

***(1)*** *Only Bids accepted for* ***DE [Table 5, column (f)]*** *should be included in* ***Tables 6, 6A and 6B.***

***(2)*** *The* ***DE*** *of the* ***PTBs*** *is expected to be on a* ***pass/fail basis****. Scored criteria and/or criteria addressed in monetary terms will more likely apply at* ***Stage II.*** *However, should scored or monetary criteria be applicable at* ***Stage I,*** *then Tables* ***6 and 6A*** *to be accordingly adjusted.*

***(3)*** *The results for this* ***Table*** *are summarised from* ***Tables 6A and 6B*** *and reflect the* ***DE*** *consensus of all Evaluators.*

***(4)******PTBs*** *for* ***Alternatives,*** *the evaluation of such to be included in* ***Tables 6, 6A and 6B.***

## **Table 6A: DE of PTB – Evaluators’ Results*[[11]](#footnote-12)***

**Name of Bidder:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Name of Bidder: | Evaluator A | Evaluator B | Evaluator C | Evaluator D |
| Example Criteria | **Meets specification** | **Meets specification** | **Meets specification** | **Meets specification** |
| 1. Proposed Goods | Yes/No | Yes/No | Yes/No | Yes/No |
|  |  |  |  |  |
| 1. Performance | Yes/No | Yes/No | Yes/No | Yes/No |
|  |  |  |  |  |
| 1. Approach and Methodology | Yes/No | Yes/No | Yes/No | Yes/No |
|  |  |  |  |  |
| 1. Any other criteria, as appropriate | Yes/No | Yes/No | Yes/No | Yes/No |
|  |  |  |  |  |
| Results of Qualification Assessment (from Table 6B) | Pass/fail | Pass/fail | Pass/fail | Pass/fail |

***(1)*** *Each Evaluator will independently conduct the* ***DE*** *of each Bidders’* ***PTB****. Evaluators must add here, or in an attachment, details of the* ***DE*** *results, including any noted strengths/weaknesses and, where applicable, reasons for the failure of Bidders to proceed to* ***Stage II.***

***(2)*** *The consensus results of the Evaluator for each Bidder are to be added to* ***Table 6.***

## **Table 6B: Evaluation of Qualifications by Evaluators**

**Name of Evaluator:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

|  |  |  |
| --- | --- | --- |
| **Example Criteria** | **Bidder:** | **Bidder:** |
| **1.1 Country Eligibility** | **Pass/Fail** | **Pass/Fail** |
|  |  |  |
| **1.2 Conflict of Interest** | **Pass/Fail** | **Pass/Fail** |
|  |  |  |
| **1.3 Bank Ineligibility** | **Pass/Fail** | **Pass/Fail** |
|  |  |  |
| **1.4 State Owned Entity** | **Pass/Fail** | **Pass/Fail** |
|  |  |  |
| **1.5 UN resolution or Recipient’s country law** | **Pass/Fail** | **Pass/Fail** |
|  |  |  |
| **2.1 History of Non-Performing Contracts** | **Pass/Fail** | **Pass/Fail** |
|  |  |  |
| **2.2 Suspension Based on Execution of Bid Securing Declaration by the Purchaser** | **Pass/Fail** | **Pass/Fail** |
|  |  |  |
| **2.3 Pending Litigation** | **Pass/Fail** | **Pass/Fail** |
|  |  |  |
| **2.4 Litigation History** | **Pass/Fail** | **Pass/Fail** |
|  |  |  |
| **3.1 Financial Performance** | **Pass/Fail** | **Pass/Fail** |
|  |  |  |
| **3.2 Average Annual Sales Turnover** | **Pass/Fail** | **Pass/Fail** |
|  |  |  |
| **4.1 Current Workload** | **Pass/Fail** | **Pass/Fail** |
|  |  |  |
| **Overall Reassessment of Qualifications** | **Pass/Fail** | **Pass/Fail** |

***[1]*** *This is a summary (to be adjusted to reflect bidding documents) of the criteria for required Qualifications. Under* ***DE*** *the prequalified Bidders’ continued compliance against the* ***AER-G*** *is to be evaluated. Guidance in paragraph* ***3(j) Annex I*** *herein should be noted. Where required* ***AER-G*** *is to be attached to support.*

***[2]*** *Each Evaluator will independently conduct the reassessment of each Bidder. The results are to be recorded in this Table/as attachments, and the consensus results are reflected in* ***Table 6.*** *Where applicable, reasons for the failure of Bidders to proceed to* ***Stage II*** *are to be detailed.*

## **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 Preliminary 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* ***PTBs*** *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-G22-PTB Stage 1 Text*** *the proposed subsequent actions to address the causes for the failed procurement.*

# **Stage IIA – Final Technical Bid (FTB)**

**Letter of Transmittal**

*Where CDB’s no objection (NO) is required for the evaluation results****[[12]](#footnote-13),*** *the* ***BER-G22-FTB*** *(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.*

*Note: Attachments to this* ***must*** *include:*

|  |  |
| --- | --- |
| Stage IIA. | Evaluation of the Final Technical Bids (FTBs) —Text |
| Table 1. | Identification, Bid Submission and FTB Opening |
| Table 2A. | Record of Public Opening of FTBs |
| Table 2B. | Attendance Sheet for the Public Opening of FTBs |
| Table 3. | Preliminary Examination [PE] - FTB |
| Table 3A. | Preliminary Examination – Evaluators’ Results |
| Table 3B. | Checklist – FTB PE and Detailed Evaluation [DE.] |
| Table 4. | Results of Detailed Evaluation - FTB |
| Table 4A. | Summary Results of FTB DE by each Evaluator |
| Table 4B. | Results of DE of FTB by each Evaluator |
| Table 5. | Evaluation Certification |

*Where the results are subject to post review, the* ***BER-G22 – FTB*** *and all supporting documentation shall be retained in the Recipient’s project files for future review by CDB.*

**Evaluation of the Final Technical Bids (FTBs)—Text**

|  |  |
| --- | --- |
| 1. **Background** | *Include a brief description, context, scope, and objectives of the Goods.* |
| 1. **The Selection Process** | *Briefly describe the evaluation process from* ***Stage I*** *resulting in a list of Bidders meeting the requirements to continue to* ***Stage IIA.****Provide summaries, where applicable, of the “Changes Required Pursuant to First Stage Evaluation” (hereinafter the* ***Memorandum).***  *Describe major events that may have affected the timing (delays, key correspondence with the CDB, extension of Bid submission date, etc.).* |
| 1. **Technical Evaluation** | *Summarise the meetings and actions taken by the Bid Evaluation Committee* ***(BEC)****; note any outside assistance employed in the evaluation; refer to relevant correspondence with CDB, and compliance of the evaluation with bidding documents****.***  *Summarise key results from evaluation of Final Technical Bids* ***(FTBs)*** *from* ***Tables 1-4,*** *including:*   * *Number of* ***FTBs*** *and* ***Financial Bids (FBs)*** *received on time.* * *Brief justification of technical criteria and sub-criteria and associated scoring, or other criteria, all as indicated in the bidding documents.* * ***P****rovide details of any requests for clarification sought by Bidders during the period to prepare Bids and responses issued or addenda issued and these should be attached to the evaluation report.* * *Observations to support the evaluated scores, including any key strengths and weaknesses of responsive Bids.* * *Provide specific reasons and names of Bidders whose* ***FTBs*** *are**deemed non-responsive at* ***PE*** *-* ***Table 3*** *and* ***DE - Table 4,*** *including those that fail to meet the scoring threshold, where applicable.* * *List items (if any) requiring further clarification or consideration in the evaluation of the* ***FBs.***   *Complete the following table with scores from* ***Table 4*** *for all Bidder(s). Include scores of Bidder(s) below the technical score threshold, if there is one, and whose* ***FBs*** *will not be opened.*   |  |  | | --- | --- | | **Names of Bidders** | **Technical Score** | |  |  | |  |  | |
| 1. **Next Steps** | *Develop schedules for the next stages in the evaluation process, i.e., CDB NO (where required), estimated date to open FBs, date for completion of financial evaluation, award of Contract(s), etc.*  *Note: In the drafting of this Section,* ***Annex II Bid*** *Evaluation Summary Checklist herein should be considered.*  *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-G22-FTB*** *the proposed subsequent actions to address the causes for the failed procurement.* |

## **Table 1: Identification, Bid Submission and FTB Opening**

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

|  |  |
| --- | --- |
| * 1. Date of CDB’s NO **to Stage I** PTB evaluation report. | Click or tap to enter a date. |
| * 1. Date unsuccessful Bidders informed of outcome of evaluation of Stage I PTB evaluation. | Click or tap to enter a date. |
| * 1. Date **successful Bidders requested to submit Stage II** Bids. | Click or tap to enter a date. |
| * 1. **Stage II** Bid Submission Deadline      1. original date, time      2. extensions, if any | Click or tap to enter a date. Time:  Click or tap to enter a date. Time: |
| * 1. Final Technical Bid **[FTB]** opening time and date. | Click or tap to enter a date. Time: |
| * 1. Record of **FTB** opening date sent to CDB *(1)* | Click or tap to enter a date. |
| * 1. Number of Bids submitted. | **FTB**: Financial (**FB**): |
| * 1. Bid validity period:      1. originally specified.      2. extension(s) if any      3. date of CDB’s NO, if required | No. of days: Click or tap to enter a date. |
| No. of days: Click or tap to enter a date. |
| Click or tap to enter a date. |

1. ***Tables 2A and 2B*** *are to be used for this purpose. If required, refer to* ***PTB*** *evaluation* ***Tables 1-3*** *for any additional information.*

**Table 2A: Record of the Public Opening of FTBs[[13]](#footnote-14)**

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

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Name and Country of Registration of Bidder *[2]*** | **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 *[3]*** |
|  | Choose an item. | Choose an item. | Choose an item. |  |

The following Bids were modified, or substitutes offered: *(Name and country of Bidder)* ***[4].***

The following Bids were withdrawn: *(Name and country of Bidder)* ***[5].***

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

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

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

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

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

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

## **Table 2B: Attendance Sheet for the Public Opening FTBs**

|  |  |  |  |
| --- | --- | --- | --- |
| **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 [PE] – FTB**

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| **Bidder**  ***(a)*** | **Verification**  ***(b)*** | **Eligibility**  ***(c)*** | **Bid Security/**  **Declaration**  ***(d)*** | **Completeness of Bid**  ***(e)*** | **Substantial Responsiveness**  ***(f)*** | **Acceptance for Detailed Evaluation**  ***(g)*** |
|  | Pass/Fail | Pass/Fail | Pass/Fail | Pass/Fail | Pass/Fail | Pass/Fail |
|  |  |  |  |  |  |  |

***Notes:***

1. *A* ***Preliminary Examination******(PE)*** *and* ***Detailed Evaluation******(DE)*** *was conducted against* ***PTBs*** *at* ***Stage I.*** *Bidders accepted for* ***Stage IIA*** *bidding were considered responsive, including the assessment of Qualifications. Consequently, all* ***Stage II*** *Bidders are “prequalified.” However, the* ***FTBs*** *are now subject to the* ***PE*** *and* ***DE*** *against the conditions stated in the bidding documents, including the* ***Memorandum.*** *Qualification assessment will be conducted once the Bidder(s) offering* ***MAB(s)*** *are identified from the evaluation of* ***FBs******(BER-G22 – FT - Stage IIB Table 11).***
2. *For explanations of the above headings and checklist for the technical and commercial* ***PE*** *of* ***FTBs*** *– refer to:*
3. *Bidding documents defining conditions for responsiveness of Bids including those detailed in* ***Table 4.***
4. *GN Section* ***– Preliminary Examination pages 8-13 and Annex III,******Table 5.***
5. ***Table 3A and Annex I paragraph 2, herein.***
6. *Pertinent details from each Evaluator’s* ***PE i****n* ***Table 3A*** *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. ***FTBs t****hat fail the* ***PE*** *are ruled non-responsive and do not proceed further in the evaluation process.*

## **Table 3A: Preliminary Examination – Evaluators’ Results**

**Name of Evaluator:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| **Bidder**  ***(a)*** | **Verification**  ***(b)*** | **Eligibility**  ***(c)*** | **Bid Security/**  **Declaration**  ***(d)*** | **Completeness of Bid**  ***(e)*** | **Substantial Responsiveness**  ***(f)*** | **Acceptance for Detailed Evaluation**  ***(g)*** |
|  | Pass/Fail | Pass/Fail | Pass/Fail | Pass/Fail | Pass/Fail | Pass/Fail |
|  |  |  |  |  |  |  |
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|  |  |  |  |  |  |  |
| *Details of* ***PE*** *and results, especially non-compliances, should be provided here or in additional sheets.* | | | | | | |

1. *Each Evaluator (of the Bid Evaluation Committee) completes this Table for all Bidders. The consensus* ***PE*** *results are to be entered in* ***Table 3.*** *The notes of each Evaluator are attached to their* ***Table 3As,*** *and in turn, these are attached to* ***Table 3.***

**Table 3B**: **Checklist – FTB PE and Detailed Evaluation (DE)**

|  |  |  |
| --- | --- | --- |
| **Example Category of Documentation** | **Bidder’s Name** | **Bidder’s Name** |
| 1. Conformity of the Goods with specified functions/performance. | Documents adequate Y/N | Documents adequate Y/N |
| 1. Design and production approach/methodology and quality assurance. | Documents adequate Y/N | Documents adequate Y/N |
| 1. Delivery program. | Documents adequate Y/N | Documents adequate Y/N |
| 1. Supplier’s organisation and Key Personnel. | Documents adequate Y/N | Documents adequate Y/N |
| 1. Changes to Specialised Subcontractors and Subsuppliers. | Documents adequate Y/N | Documents adequate Y/N |
| 1. Updates on Manufacturer’s Authorisation[s]. | Documents adequate Y/N | Documents adequate Y/N |
| 1. Updates of commitments from key Subcontractors and Subsuppliers. | Documents adequate Y/N | Documents adequate Y/N |
| 1. Current Contract Commitments/ Goods in Progress. | Documents adequate Y/N | Documents adequate Y/N |
| 1. Other evaluation criteria in bidding documents (e.g., Sustainable Procurement, innovation, etc.). | Documents adequate Y/N | Documents adequate Y/N |
| 1. Overall results of Preliminary Examination. | Responsive/Non-responsive | Responsive/Non-responsive |

***[1]*** *This Checklist, but using criteria for such in the bidding documents, is the basis to conduct the* ***PE*** *of the* ***Completeness and Substantial Responsiveness*** *of the technical and commercial documentation of the* ***FTBs*** *– this generally is a pass-fail assessment. The results are to be combined with the* ***PE*** *results in* ***Table 3.***

***[2] FTBs*** *that are found to be responsive from the* ***PE*** *proceed to the* ***DE,*** *where the quality and compliance of* ***FTBs*** *are scored/evaluated against the criteria in the bidding documents. The* ***DE r****esults are summarised in* ***Table 4.***

***[3] FTBs*** *that are not responsive, either from the* ***PE*** *or* ***DE,*** *are set aside and proceed no further.*

**Table 4: Results of Detailed Evaluation - FTB**

|  |  |  |  |
| --- | --- | --- | --- |
| **Example Criteria** | **Points** | **Bidder A**  **[Score]** | **Bidder B**  **[Score]** |
| **A.** **Proposed Goods:** To what extent the Proposed Goods meet the Employer’s Requirement. |  |  |  |
| **B**. **Value Addition:** To what extent the Bid adds value in terms of innovation, performance, functionality and/or operation and maintenance costs. |  |  |  |
| **C. Approach and Methodology** |  |  |  |
| 1. Design Methodology |  |  |  |
| 1. Organisational arrangements   (Team structures, roles, and responsibilities) |  |  |  |
| 1. Key Personnel qualifications; |  |  |  |
| 1. Quality assurance |  |  |  |
| 1. Risk mitigation |  |  |  |
| 1. Sustainability |  |  |  |
| 1. Schedule |  |  |  |
|  |  |  |  |
| ***D. Any other factors, as appropriate*** |  |  |  |
| **Total Scores** | **100** |  |  |

1. *Only* ***FTBs*** *accepted for* ***DE (Table 3, column g)*** *should be included in this* ***Table.***
2. *The above criteria and allocated points are to be those stated in the bidding documents.*
3. *The* ***DE r****esults of any* ***pass/fail*** *criteria should be summarised in this* ***Table.***
4. *Where a minimum score is stipulated in the bidding documents****, FTBs*** *not achieving the threshold will be disqualified, and Financial Bids not opened.*
5. *Score assigned to each Bidder is the Consensus/Averaged score from* ***Table 4A.***

## **Table 4A: Summary Results of FTB DE by each Evaluator**

**Name of Bidder:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Example Criteria** | **Points** | **Evaluator A**  **[Score]** | **Evaluator A**  **[Score]** | **Consensus/Averaged Scores** |
| 1. **Proposed Goods:** To what extent the Proposed Goods meet the Employer’s Requirement. |  |  |  |  |
| 1. **Value Addition:** To what extent the Bid adds value in terms of innovation, performance, functionality and/or operation and maintenance costs. |  |  |  |  |
| 1. **Approach and Methodology** |  |  |  |  |
| 1. Design Methodology |  |  |  |  |
| 1. Organisational arrangements   (Team structures, roles, and responsibilities) |  |  |  |  |
| 1. Key Personnel qualifications; |  |  |  |  |
| 1. Quality assurance |  |  |  |  |
| 1. Risk mitigation |  |  |  |  |
| 1. Sustainability |  |  |  |  |
| 1. Schedule |  |  |  |  |
| 1. ***[Any other factor as appropriate]*** |  |  |  |  |
|  |  |  |  |  |
| **Total Scores** | **100** |  |  |  |

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

1. *The results here are from* ***Table 4B*** *completed by each Evaluator. The* ***DE*** *results are brought to a consensus point and transferred to* ***Table 4.***
2. *Notes are to be made on this* ***Table 4A*** *or by attaching the* ***Table 4B*** *to support scoring and identify any strengths and weaknesses and reasons for finding* ***FTBs*** *non-responsive.*
3. ***Refer to notes in Table 4 that apply to Tables 4A and B.***

## **Table 4B: Results of DE of FTB by each Evaluator**

**Name of Evaluator:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Example Criteria** | **Total**  **Points** | **Bidder A**  **[Score]** | **Bidder B**  **[Score]** | **Bidder C**  **[Score]** |
| 1. **Proposed Goods:** To what extent the Proposed Goods meet the Employer’s Requirement. |  |  |  |  |
| 1. **Value Addition:** To what extent the Bid adds value in terms of innovation, performance, functionality and/or operation and maintenance costs. |  |  |  |  |
| 1. **Approach and Methodology** |  |  |  |  |
| 1. Design Methodology |  |  |  |  |
| 1. Organisational arrangements   (Team structures, roles, and responsibilities) |  |  |  |  |
| 1. Key Personnel qualifications |  |  |  |  |
| 1. Quality assurance |  |  |  |  |
| 1. Risk mitigation |  |  |  |  |
| 1. Sustainability |  |  |  |  |
| 1. Schedule |  |  |  |  |
|  |  |  |  |  |
| 1. ***[Any other factor as appropriate]*** |  |  |  |  |
| **Total Scores** | **100** |  |  |  |

## **Table 5: Evaluation Certification**

**Respectfully Submitted by the Evaluation Committee**

|  |  |  |  |
| --- | --- | --- | --- |
| **Name** | **Organisation/Position** | **Date** | **Signature** |
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|  |  |  |  |
| I confirm that the evaluation of the Final Technical Bid 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 none of the FTBs are found to be responsive, the Recipient shall recommend 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-G22*** *the proposed subsequent actions to address the causes of the failed procurement.*

# **Stage IIB – Financial Evaluation and Award-FT**

**Letter of Transmittal – Financial and Award**

*Where contracts are subject to CDB’s prior review, Financial Bids* ***(FBs)*** *must not be opened before the Recipient has received a no-objection to the* ***BER-G22 FTB*** *and the recommendation to open the* ***FBs****. 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-G22-FT*** *is completed by the Recipient and where required submitted to CDB for* ***NO. Stage IIA, Table 4,*** *complete with CDB’s**comments shall be attached to* ***BER-G22-FT*** *as* ***Appendix I. The complete BER-G22 -FT,*** *and the other attachments**listed in the table below under cover of 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.*

*The following must be attached to the letter:*

|  |  |  |  |
| --- | --- | --- | --- |
| **Title** | **Description** | **Title** | **Description** |
| Stage IIB | 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 Opening of Financial Bids and Price Read-out | 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 Contract Award |
| Table 3A | Preliminary Examination – Evaluators’ Results | Table 12 | Evaluation Certification |
| Table 4 | Corrections and Unconditional Discounts | Appendix I | Table 4 Stage IIA - FTB |
| Table 5 | [Exchange Rates](#_Toc68433677) |  |  |
| Table 6 | [Currency Conversion (Single or Multiple Currencies)](#_Toc68433678) |  |  |

*Where the Contract is subject to post review, the* ***BER-G22 - Award*** *and all supporting documentation shall be retained in the Recipient’s project files for possible future review by CDB.*

**Report Financial Evaluation and Award Recommendation—Text[[14]](#footnote-15)**

|  |  |
| --- | --- |
| **1.** **Background** | *Include a brief description, context, scope, and purpose for the procurement.* |
| **2. Financial Evaluation** | *Briefly describe (i) the meetings and actions taken by the Bid Evaluation Committee, (ii) any outside evaluation assistance, and (iii) relevant correspondence with CDB.*  *Summarise key results from the financial evaluation [refer to* ***Tables 2 through 11]*** *including* ***(i)*** *reasons for any* ***FBs*** *found non-responsive at the* ***PE*** *or* ***DE*** *stages thus ending the evaluation process for such Bidders* ***(ii)*** *Provide comments on the impact of Optional Discounts[[15]](#footnote-16) and/or regional preferences, if any, on the* ***TEPs*.**  *Present the results of the evaluation of the* ***FB****s in the following Table.*  **Evaluation of Financial Bids**   |  |  |  | | --- | --- | --- | | **NAMES OF BIDDERS** | **TEPs*[[16]](#footnote-17)*** | **SCORE** | |  |  |  | |  |  |  | |
| **3. Combined Evaluation TBs and FBs** | *Address the award recommendations to Bidder(s) offering* ***MAB(s),*** *cross-reference to* ***Table 10*** *[Qualification of Bidder(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[[17]](#footnote-18)**   |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | | **BIDDER** | **TECHNICAL** | | **FINANCIAL** | | **TOTAL SCORE** | |  | **SCORE** | **WEIGHTED** | **SCORE** | **WEIGHTED** |  | | 1) |  |  |  |  |  | | 2) |  |  |  |  |  | |
| **4. Contract Award** | Include timing and actions to be taken to award the Contract(s) considering, if applicable, the Standstill Period – refer to **Annex I paragraph 4(c).** |

## **Table 1: Identification and Financial Bid Opening**

|  |
| --- |
| **Name of Project:** |
| **Project No.:** |
| **Contract Name:** |
| **Contract No:** |
| **Purchasing Entity: (name)\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_(address)** |

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

|  |  |
| --- | --- |
| * 1. Date of CDB’s NO to Stage II FTB Evaluation Report | Click or tap to enter a date. |
| * 1. Date unsuccessful Bidders informed of outcome of evaluation of FTBs. | Click or tap to enter a date. |
| * 1. Date successful Bidders informed of outcome of evaluation of FTBs and invited to opening of FBs. | Click or tap to enter a date. |
| * 1. *Financial Bid* ***[FB]*** *opening* ***[1]*** | Click or tap to enter a date. Time: |
| * 1. Date record of **FB o**pening, sent to CDB ***[2]*** | Click or tap to enter a date. |
| * 1. Number of FB received and opened. | Received: \_\_\_\_\_\_\_\_\_Opened: \_\_\_\_\_\_\_\_\_\_\_\_ |
| * 1. Bid validity period.      1. originally specified.      2. extension(s) if any      3. date of CDB’s NO, if required | No. of days: Click or tap to enter a date. |
| No. of days: Click or tap to enter a date. |
| Click or tap to enter a date. |

***[1]***Where a probity auditor is utilised in accordance with 6.64 of the Procurement Procedures there will not be a public opening of the financial offer and the report should be amended accordingly.

***[2]*** *Tables* ***2A and 2B*** *are to be used for this purpose.*

*If required, refer to* ***Stage I******PTB*** *evaluation Tables* ***1-3 for*** *and* ***Stage IIA FTB [Table 1]*** *for additional information.*

**Table 2A: Record of Public Opening of Financial Bids and Prices Read-out**

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)*** | **Total Technical Scores**  ***[3]***  ***(b)*** | **Read-Out Bid Price and Currency(ies*) [4]***  ***(c)*** | **Read-Out Discount**  **[Unconditional] *[5]***  ***(d)*** | | **Total Bid Price**  **and**  **Currency(ies)**  ***(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 -* ***Stage IIA******Table 4*** *of the* ***BER-G22- FTB.***

***[4]*** *Bid prices composed of several currencies. Each currency and amount shall be entered on a separate line for the Bidder.*

***[5]*** *Where Optional Discounts (refer* ***Annex I paragraph 3(h)*** *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* ***Stage IIB,******Table 7.***

***[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** |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |

## **Table 3: Preliminary Examination - Financial**

|  |  |  |  |
| --- | --- | --- | --- |
| **Bidder** | **Completeness of Bid** | **Substantial Responsiveness** | **Acceptance for Detailed Evaluation** |
| ***(a)*** | ***(b)*** | ***(c)*** | ***(d)*** |
|  | Pass/Fail | Pass/Fail | Pass/Fail |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |

***[1]*** *From the Preliminary Examination* ***(PE)*** *and Detailed Evaluation* ***(DE)*** *of the* ***PTB*** *and then the* ***FTB,*** *some commercial aspects (e.g., Bidder’s eligibility) were concluded for those Bidders reaching this* ***Stage.*** *Nevertheless, the* ***PE*** *of* ***FBs*** *should reexamine the adequacy and completeness of all aspects under the above headings. The above includes for example: Letter of Bid signed by Authorised Signatory, Price Schedules included, and Bid validity – duration as per the ITB.*

***[2]*** *For the* ***PE*** *each Evaluator should complete a copy of* ***Table 3A*** *for each Bidder with notes regarding the* ***pass/fail*** *results. These Tables are to be attached to* ***Table 3*** *supporting the above consensus summary* ***[column (d)]****. A full explanation should be attached here of the non-responsive ruling of any Bidder.*

***[3]*** *For explanations of the above headings and checklist for the* ***PE*** *of* ***FBs*** *– refer to:*

1. *Bidding documents defining conditions for responsiveness of Bids including those detailed in* ***Table 10.***
2. ***GN Section******– Preliminary Examination pages 8-13 and Annex III,******Table 5.***
3. ***Table 3A herein.***
4. ***Annex I paragraph 2, herein.***

***[4] DEs*** *of* ***FBs*** *will only be conducted for those Bidders identified in* ***column (d)*** *above and reflected in* ***Tables 4 through 11.***

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

## **Table 3A: Preliminary Examination – Evaluators’ Results**

**Name of Evaluator:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

|  |  |  |  |
| --- | --- | --- | --- |
| **Bidder** | **Completeness of Bid** | **Substantial Responsiveness** | **Acceptance for Detailed Evaluation** |
| ***(a)*** | ***(b)*** | ***(c)*** | ***(d)*** |
|  | Pass/Fail | Pass/Fail | Pass/Fail |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |

1. *Each Evaluator (of the Bid Evaluation Committee) completes this* ***Table*** *for all Bidders. The consensus* ***PE*** *results are to be entered in* ***Table 3.*** *The notes of each Evaluator are attached to each* ***Table 3A,*** *and in turn, these are attached to* ***Table 3.***

**Table 4: Corrections and Unconditional Discounts**

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
| **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** |  | **Percent** | **Amount(s)** |  |
| ***(a)*** | ***(b)*** | ***(c)*** | ***(d)*** | ***(e) = (c) + (d)*** | ***(f)*** | ***(g)*** | ***(h) = (e) – (g)*** |
|  |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |

***Notes****:*

*(****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 (g****)*** *are from* ***Table 2A (columns a, c, and d, respectively).***

***(3)*** *Corrections in* ***column (d)*** *may be positive or negative.*

***(4)******(i)*** *If the Discount is offered as a percent,* ***column (f)*** *is usually the product of the amounts in* ***columns (e)****. If the Discount is provided as an amount, it is entered directly in* ***column g)****. A price increase is a negative discount.* ***(ii)*** *Where Optional Discounts are recorded in* ***Table 2A*** *[refer* ***Annex I paragraph 3(h) herein],*** *and where applicable****,*** *they are to be addressed in* ***Table 7.***

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

**Table 5: Exchange Rates**[[18]](#footnote-19)

|  |  |
| --- | --- |
| 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:**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **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)*** |
|  |  |  |  |  |  |
|  |  |  |  |  |  |
|  |  |  |  |  |  |
|  |  |  |  |  |  |

***(1) Columns (a), (b) and (c) are from Table 4 - columns (a), (b) and (h) 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, and Priced Deviations**

**Specify Evaluation Currency:**

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

***(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* ***Optional******Discounts (ODs)****, and some or all Bidders have offered complying* ***ODs,*** *the impact is to be reflected in column (e).*

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

**Table 8: Regional Preferences for Goods**

**Specify Evaluation Currency:**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Bidder** | **Regional Preference Group** | **Total Evaluated Price** | **Regional Preference (%)** | **Preference Amount** | **Total Comparison Price** |
|  |  |  |  |  |  |
| ***(a)*** | ***(b)*** | ***(c)*** | ***(d)*** | ***(e)*** | ***(f) = (c) + (g)*** |
|  |  |  |  |  |  |

***(1)******Procedures Annex 4*** *restricts the use* ofregional preference for “***single responsibility or Turn-key Contracts for the supply of several discrete items of equipment, as well as major installation and/or construction services.”*** *Thus, for those types of Goods this Table is not needed. Where it is applicable, full details of the application can be found in* ***Section III ITB*** *of the bidding documents and recapped, as follows against the above Table.*

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

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

***(4) Column (d)*** *is the applicable preference percentage not to exceed* ***15%*** *per the bidding documents, to be applied to* ***column (c)*** *for* ***Group A and B******Bidders;******Group C******Bidder****s addition is zero.*

***(5)******Column (e)*** *will be the Preference Amount that is the product of* ***column (d) to column (c).***

***(6) Column (f)*** *determines the Bidder(s) offering* ***MAB(s).*** *Such Bidder(s****)*** *move(s) forward to pre-qualification reassessment – refer* ***Table 10*** *[as described in* ***Annex 1 paragraph 3(j)*** *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 Goods for Contractors from the Borrowing Member Countries of CDB.*

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

**Table A: Technical Evaluation**

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

**Table B: Financial Evaluation**

|  |  |  |
| --- | --- | --- |
| **NAMES OF BIDDERS** | **TOTAL EVALUATED PRICE*[[20]](#footnote-21)*** | **SCORE** |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |

**Table C: Final Evaluation**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **NAMES OF BIDDERS** | **TECHNICAL** | | **FINANCIAL** | | **TOTAL SCORE** |
|  | **SCORE** | **WEIGHTED** | **SCORE** | **WEIGHTED** |  |
| 1) |  |  |  |  |  |
| 2) |  |  |  |  |  |
| 3) |  |  |  |  |  |
| 4) |  |  |  |  |  |
| 5) |  |  |  |  |  |

* *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)**

|  |  |  |
| --- | --- | --- |
| **Example Criteria** | **Name of Bidder** | **Name of Bidder** |
| * 1. Country Eligibility | Pass/Fail/Comments | Pass/Fail/Comments |
| * 1. Conflict of Interest | Pass/Fail/Comments | Pass/Fail/Comments |
| * 1. Bank Ineligibility | Pass/Fail/Comments | Pass/Fail/Comments |
| * 1. State-Owned Entity | Pass/Fail/Comments | Pass/Fail/Comments |
| * 1. UN resolution or Recipient’s country law | Pass/Fail/Comments | Pass/Fail/Comments |
| **2.1** History of Non-Performing Contracts | Pass/Fail/Comments | Pass/Fail/Comments |
| **2.2** Suspension Based on Execution of Bid Securing Declaration by the Purchaser | Pass/Fail/Comments | Pass/Fail/Comments |
| **2.3** Pending Litigation | Pass/Fail/Comments | Pass/Fail/Comments |
| **2.4** Litigation History | Pass/Fail/Comments | Pass/Fail/Comments |
| **3.1** Financial Performance | Pass/Fail/Comments | Pass/Fail/Comments |
| **3.2** Average Annual Sales Turnover | Pass/Fail/Comments | Pass/Fail/Comments |
| **4.** Details of current workload | Pass/Fail/Comments | Pass/Fail/Comments |
| **Overall Reassessment of Qualifications.** | Pass/Fail/Comments | Pass/Fail/Comments |

***[1]*** *The precise criteria of Qualifications to be used for Bidder(s) offering MAB(s) will be that detailed in the bidding documents. The reassessment of the prequalified Bidder(s) offering* ***MAB(s)*** *will be conducted and findings added to this Table or as attachments – refer* ***Annex I paragraph 3(j).***

***[2]*** *All Evaluators will independently conduct the reassessment and document the individual results. These results will be attached to this Table that will reflect the consensus results. Where applicable the key results from* ***AER-G*** *will also be attached to this* ***Table****.*

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

|  |  |  |
| --- | --- | --- |
| 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(s) |  | |
| 1. Principal countries of origin of materials and services |  | |
| 1. Estimated date (month/year) of Contract signing |  | |
| 1. Estimated delivery/completion period(s) |  | |
|  | **Currency** | **Amount** |
| 1. Bid Price (Read-out) ***Table 2A****[[21]](#footnote-22)* |  |  |
| 1. Add Correction of Errors - ***Table 4 column (d)*** |  |  |
| 1. Deduct Unconditional Discounts - ***Table 4, column (g)*** |  |  |
| **Corrected Bid Prices** ***– Table 4, column (h)*** |  |  |
| 1. Add Additions - ***Table 7 column (c)*** |  |  |
| 1. Add Adjustments -***Table 7 column (d)*** |  |  |
| 1. Add Priced Deviations -***Table 7 column (e)*** |  |  |
| **Total Evaluated Price *-Table 7 column (f*)** |  |  |
| 1. Deduct items ***D, E, and F above[[22]](#footnote-23)*** |  |  |
| **Proposed Contract Award Amount*[[23]](#footnote-24)*** |  |  |
| 1. Budget |  |  |

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

1. *Summarise here the results of the Qualification assessment of the* ***MAB*** *Bidder: ref* ***Table 10*** *and* ***Annex I paragraph 3(j)*** *herein.*
2. *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 I),*** *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-G22*** *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** |
|  |  |  |  |
|  |  |  |  |
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|  |  |  |  |
|  |  |  |  |
| I confirm that the evaluations of the Financial Bids and the combined Technical and Financial scores 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 to Bids Preliminary Technical* ***[PTB].*** *Final Technical* ***[FTB]*** *and Financial* ***[FB]*** *unless expressly noted differently)*

|  |  |
| --- | --- |
| 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)*** * *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[[24]](#footnote-25).*  ***(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,* ***BEC*** *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* ***BEC*** *members[[25]](#footnote-26).*  ***(b) Request of clarifications from Bidders:*** *On occasion, the Recipient may request clarifications from Bidders concerning ambiguities or inconsistencies in the Bids. 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 Goods 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; with the exception of the bid clarification meetings after the first stage.***  *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* ***(PE)*** *of* ***PTBs, FTBs and FBs*** *is the first step in the evaluation process determining the compliance of each Bidder and its Bid to proceed to Detailed Evaluation* ***(DE)*** *by examining the following categories[[26]](#footnote-27):*   * *Verification* * *Eligibility* * *Bid Security or Bid Securing Declaration (****FTB****s only)* * *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.*  ***(FTB and FB.****) 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 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 Stages* ***IIA and IIB Texts****, as applicable.* |
| 1. ***Detailed Evaluation of Bids*** | *Only those* ***PTBs****,* ***FTBs*** *and* ***FBs*** *that pass the* ***PE*** *then proceed to Detailed Evaluation* ***(DE)****, against the specifications and other conditions in the bidding documents. The following are provided to assist in the* ***DEs*** *for all* ***three Bid stages****.*  ***(a) Modifications:*** *In accordance with the ITB, Bidders can submit Modifications prior to the opening of the Bids. The modifications will be read out at the Bid openings. The modifications may include evidence of performance, or other improvements, and the impact of such should be fully reflected in the* ***PE*** *and* ***DE*** *of the Bids.*  ***(b) Technical Evaluation PTB and FTB:*** *The technical* ***DEs*** *will be conducted against both pass/fail and rated criteria, as detailed in the bidding documents. In some instances, variations in performance of the Goods for example, can be converted to monetary costs for evaluation purposes.*  ***(c) 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* ***Stage IIB Table 4.*** *The effect of unconditional discounts (or increases) must be applied to the appropriate base specified in the bidding documents.*  ***(d) Corrections for computational Errors (FB)****: The methodology for correcting computational errors is described in the bidding documents****.*** *The read-out Bid prices and their corrections should be noted in* ***Stage IIB Table 4****. The sums are to be included both in the evaluated prices and contract award. The corrections are considered binding on the Bidder.*  ***(e) 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* ***Stage IIB 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 multiple currency options, where the Bid price can be expressed in several currencies, but usually not more than three plus the Recipient’s currency.* ***Stage IIB Table 6*** *is to be adjusted in this case.*  ***(f) Additions (FTB and FB):*** *Any resulting costs developed by the Recipient for Additions (e.g., for nonmaterial non-compliances as defined in the ITB) – shall be expressed in the evaluation currency and included in* ***Stage IIB******Table 7*** *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 Stage IIB, Table 11****.*  ***(g) Adjustments (FTB and FB):*** *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, including performance and productivity –* ***[refer GN.1 and Procedures, Annex 5, Paragraph 4]*** *of the Goods offered. The value of the Adjustments will be expressed in terms of cost in the evaluation currency and shown in* ***Stage IIB Table 7.***  ***(h) Priced Deviations (FTB and FB):*** *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 together with any optional discounts or alternate delivery dates. The value of the Deviations will be expressed in terms of cost in the evaluation currency and shown in* ***Stage IIB Table 7.***  ***(i) 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* ***Table 8*** *herein,* ***Procedures, Paragraphs 6.52 and 6.53, and Annex 4.*** *The impact of the preference will be reflected in* ***Table 8.***  ***(j) Qualifications (PTB and FB)[[27]](#footnote-28):*** *As noted in the* ***Preface,*** *the* ***BER-G22*** *is based on a shortlist of only prequalified Bidders being invited to submit* ***PTBs.*** *This shortlist was achieved by Bidders providing Qualification data that was assessed by the Recipient and the results summarised in the “Applications Evaluation Report – Goods”* ***(AER-G).***  *Bidders are required under the* ***ITB*** *to confirm continued compliance of Qualifications provided for the* ***AER-G****[[28]](#footnote-29)****.*** *Where changes have occurred, Bidders must provide the details, and such for all Bidders are assessed by the Recipient during the* ***DE*** *of the* ***PTB*** *and then again at* ***Stage IIB – FT*** *but then only for Bidder(s) that offer* ***MAB(s).*** *The* ***FT*** *assessment**will include current workload information provided by Bidder(s)****.*** *Where Qualification changes are not acceptable to the Recipient then the related Bid(s) are set aside as non-responsive. In the case of a* ***MAB*** *Bidder, the Bidder offering the next best* ***MAB*** *is to be assessed.*  *In some instance Bidder(s) can be “conditionally prequalified” under the* ***AER-G.*** *In this case, the Bidder(s) are required to provide with* ***Stage I PTB*** *details or data on how the conditions will be addressed. This information will be assessed by the Recipient.* |
| 1. ***Contract Award*** | ***(a) Contract award****: For Contracts subject to CDB’s No Objection* ***(NO),*** *the* ***BER-G22-FT*** *should be submitted to CDB preferably no later than* ***three (3) weeks*** *before the expiration of the validity of the Bid(s).*  ***(b)******Negotiations [FTB &FB]****: Once CDB’s* ***NO*** *is received for* ***BER-G22 - FT****, the Recipient can negotiate with the selected Bidder(s)[[29]](#footnote-30). Where negotiations take place, a draft Contract initialled by the Contractor 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-G22****-FT,*** *then Contract(s) can be awarded.* * *Once the Contract is awarded, 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, the name and nationality of the Contractor, and the Contract price****.*** *Where NO is not required, then the Recipient will publish a similar* ***CAN******(****refer -* ***Procedures Paragraph 6.97).***   ***(c) Standstill Period:*** *For some Contracts, there is a 10-working day “standstill period” (****Procedures, Paragraph 6.90****). In this case, after the* ***BER-G22-FT*** *receives NO from the CDB, where applicable, 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. 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.*   1. ***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.*   ***(e) Bid Securities:*** *Bid securities of unsuccessful Bidders should be promptly returned after the Contract award has been made. However, if the effectiveness of the Contract 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 Bidders[[30]](#footnote-31).*  ***(f) Post Review****: For Contracts subject to CDB 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* ***Stage I [Tables 4A and 4B] and Stage IIA and IIB [Tables 2A and 2B, herein],*** *if not previously submitted to CDB*
* *Provide details on eliminating any* ***PTBs, FTBs*** *and* ***FBs*** *during Preliminary Examinations****.*** *Attach to the applicable Tables copies of selected pages from Bids, as required, as examples of objectionable features.*
* *Explain any substantial corrections for computational errors (refer to* ***Stage IIB,******Table 4)*** *that may affect the selection of Bidder(s).*
* *The Additions, Adjustments, and Priced Deviations in* ***Stage IIB Table 7*** *require detailed explanations where they may affect the selection of Bidder(s).*
* *Eligibility for a regional preference (when permitted), as indicated in* ***Stage IIB******Table 8****, 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 Unconditional Discounts* ***(Annex I, paragraph 3(c***
* ***), and Stage IIB, Table 4)*** *read out and recorded at the Bid opening.*
* *Provide detailed reasons for ruling any* ***PTBs, FTBs and FBs*** *non-responsive during Detailed Evaluation.*
* *Attach copies of any correspondence from Bidders that raise objections to the Bidding and evaluation process, together with the Recipient’s detailed responses.*
* *Attach copies of any correspondence from Bidders that raise objections 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 all* ***BER-G22s*** *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 “Employer” or Purchaser* ***(GN).*** [↑](#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. *Refer to* ***Procedures, Paragraphs 6.42, 7.15 and 7.16*** *and "Guidance Note on Evaluation Criteria for the Procurement of Goods, Works and Non-Consulting Services****" December 2021(GN.1) and Annex I*** *herein.* [↑](#footnote-ref-5)
5. *See Paragraphs 5.04-5.07 of the Procedures*. [↑](#footnote-ref-6)
6. *In the drafting of this Section,* ***Annex II*** *herein should be considered.* [↑](#footnote-ref-7)
7. *Refer to* ***Table 7*** *for guidance if no Bidders are responsive. Add plans here to address, where required.* [↑](#footnote-ref-8)
8. *This item is not applicable and can be deleted where the selection method is limited bidding.* [↑](#footnote-ref-9)
9. Addenda and requests for clarification and responses should be attached to evaluation report. [↑](#footnote-ref-10)
10. *The criteria shown here are examples only. The actual criteria from the bidding documents should be used.* [↑](#footnote-ref-11)
11. *The criteria shown here are examples only. The actual criteria from the bidding documents shall be used.* [↑](#footnote-ref-12)
12. *See Procedures, Paragraphs 5.04 -5.07.* [↑](#footnote-ref-13)
13. *Given the nature of the 2+2 approach, it is considered unlikely that Bidders would be invited to submit* ***FTBs*** *for Alternatives. This should be addressed, if applicable, at* ***Stage I****. The* ***BER-G22 -FTB*** *reflects the “no Alternative” expectation. However, should there be conditions where Alternatives are invited, then adjustments should be made to the* ***Tables of Stages IIA and IIB*** *to accommodate applicable information and evaluations.* [↑](#footnote-ref-14)
14. *In the drafting of this Section,* ***Annex II*** *Bid Evaluation Summary Checklist herein should be considered.* [↑](#footnote-ref-15)
15. ***Refer Annex paragraph 3(h)*** [↑](#footnote-ref-16)
16. *From* ***Stage IIB, Tables 7*** *and* ***9*** [↑](#footnote-ref-17)
17. *From* ***Stage IIA, Table 4 and Stage IIB, IIB,******Table 9****.* [↑](#footnote-ref-18)
18. *Refer to Annex I, Paragraph 3(e) herein.*  [↑](#footnote-ref-19)
19. *From* ***FTB BER -G22, Section I*** [↑](#footnote-ref-20)
20. *From* ***column (f)*** *of* ***Table 7*** [↑](#footnote-ref-21)
21. *All Tables listed below are those from* ***Stage IIB.*** [↑](#footnote-ref-22)
22. *Add/subtract estimate of costs to be negotiated with Bidder(s), for example Optional Discounts – to be subtracted from price of Contract, where applicable.* [↑](#footnote-ref-23)
23. *Where Amount consists of more than one currency, provide a footnote to define % in each currency.* [↑](#footnote-ref-24)
24. *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-25)
25. *Electronic systems used by the Recipient for procurement require* ***CDB NO*** *before use.* [↑](#footnote-ref-26)
26. *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-27)
27. *Refer to* ***GN.1*** *for further guidance.* [↑](#footnote-ref-28)
28. *To prequalify Bidders are required to provided details of experience on any previous contracts that qualifies the Bidders for the current Contract. As the Bidders’ experience was accepted by the Recipient to prequalify, it does not have to be reassessed.* [↑](#footnote-ref-29)
29. *The scope of the negotiations must be clearly defined in* ***BER-G22-FT, Table 11.*** [↑](#footnote-ref-30)
30. *Where applicable, this must be done before the Notice of Intention to Award* ***(Procedures Section 6.91)*** *is published.* [↑](#footnote-ref-31)