**Borrower/Beneficiary’s**

**Logo**



**Economic Evaluation Report and Selection of the Most Convenient Offer**

**Process of *Private/Public – National/International Bid/Contest***

**With Resources of the Central American Bank for Economic Integration (CABEI)**

**(Modality: *Co-Qualification*)**

***(Indicate the name of the bid/contest process)***

***Nº ------ (process number)***

***(Indicate the name of the project or program in the framework on which this***

***bid/contest is carried out)***

**May 2018**

**INTRODUCTION FOR BORROWER/BENEFICIARY IN CHARGE OF THE BID/CONTEST PROCESS**

***(This instructions page should not be part of the evaluation report for the prequalification of bidders of a bid/contest process, the same as for texts marked in red and cursive font, which only purpose is to guide the Borrower/Beneficiary about the text that must be inserted in its place).***

Based on the Policy for the Procurement of Goods, Works, Services and Consulting Services with Resources of the Central American Bank for Economic Integration and Norms for its Application, this document is prepared with the standard guidelines for preparing the evaluation report of the economic offer and the selection of the most convenient Offer for the bid/contest process; it has been prepared following the procedure stipulated in the Standard Document of a Bid/Contest for Works, Goods, Services and Consulting Services.

When the Borrower/Beneficiary agrees a different procedure with the Bank, the pertinent adjustments must be made to this Standard Document, taking into consideration that such document must include the necessary information that verifies the application of the Policy and Norms of Application of the Bank within the evaluation process of the Offers.

This report will be prepared by the Executive Bid/Contest Committee, which must include the detail on the revision, analysis, evaluation and comparison of the offers, presenting when it corresponds, the precise reasons in which the prequalification of the bidders is based on.

In addition, it must contain the pertinent information about publications made, communications during the period of preparation and evaluation of proposals, amendments, consultations taken care of, clarifications and/or corrections requested and received, etc., and when it corresponds, it must be submitted to the consideration of the Country Division that is in charge of the operation so as to obtain a Non-Objection before notifying the results to the bidders.

The document is divided in four sections:

1. Presentation of the report
2. Evaluation of economic offer
3. Selection of the most convenient Offer
4. Annexes of the evaluation report

For all cases, section IV Annexes, must contain the documentation related to the contents of the report, including Non-Objections, clarification/corrections requests, communications received, acknowledgements of receipt, minutes, etc., duly organized.

The use of this standard document is mandatory for all bids and contests for contracting works, goods, consulting or services, totally or partially financed with resources of CABEI, promoted by the Borrowers/Beneficiaries.

This document is made publicly known through CABEI’s website and it is recommended that before using it, the user becomes familiar with the Base Document of the process and the Bank’s Procurement Policy and Norms that are in force.

It is important to consider that, if the Chief Country Officer that is responsible for the operation determines that the evaluation report does not comply with the provisions of this procurement process, it will abstain from granting the Non-Objection and shall immediately notify the Borrower/Beneficiary the reasons why the Non-Objection is not granted.

In case the Borrower/Beneficiary does not amend the indicated aspects, the Chief Country Officer responsible of the operation will determine that the procurement is not eligible for financing

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**Evaluation Report of Economic Offers and Selection of Most Convenient Offer**

**Process: *Detail the name of the process and the identification number***

# Presentation of Evaluation Report

This report has been prepared by the Executive Bid/Contest Committee, which includes the results of the evaluation of the economic offers and the selection of the most convenient Offer, among the ones presented in the process.

Said evaluation is strictly based on the provisions of the Base Document of the *Bid/Contest* that corresponds, in faith of which they submit this report

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **No.** | **Members of the Executive Bid/Contest Committee** | **Position** | **Signature** | **Date** |
| *1* | *Name* | *Position* | *Signature* | *Date*  |
| *2* |  |  |  |  |
| *n* |  |  |  |  |

*All pages of the report must be signed by the Executive Committee*

# Background

## Prequalified bidders and that obtained the minimum technical score

The starting point of this evaluation is the prequalification report of bidders and the evaluation report of technical offers, dated *(Indicate dates)* respectively, in which the Executive Committee recommends opening the economic offer of the following bidders:

|  |  |  |
| --- | --- | --- |
| **No.** | **Bidder** | **Technical Score** |
| *1* | *Name of Bidder* | *Insert: Complies / % obtained* |
| *2* |  |  |
| *n* |  |  |

## Relevant facts during the evaluation

*Describe relevant facts that could be for example expansions of the validity of the Offers or requested guarantees, changes in the Executive Committee, etc.*

*In case there are no relevant facts, please indicate “There are no other relevant facts”.*

## Communication of results

|  |  |  |
| --- | --- | --- |
| **No.** | **Bidder** | **Date of Communication** |
| *1* | *Name of Bidder* | *Date, means of communication* |
| *2* |  |  |
| *n* |  |  |

## Protests

*Describe and detail protests received and their resolution including in the annexes all related information.*

*In case there are no protests, please indicate “No protests were submitted”.*

## Summon to the opening of the Economic Offer

*Once protests are received and resolved, bidders that participated in the process will be summoned to a public meeting in which the economic offers will be opened.*

|  |  |  |
| --- | --- | --- |
| **No.** | **Bidder** | **Date of Summon** |
| *1* | *Name of Bidder* | *Date, means of communication* |
| *2* |  |  |
| *n* |  |  |

## Opening of the Economic Offer

*Write under this section a chronological description of the activity of opening the economic offer, during which the members of the Executive Committee must be present, and must contain:*

1. Date and time of opening activity: *Date and time*
2. Number of offers that were opened: *Number of offers*
3. Confirmation that the envelopes remained closed
4. List of information submitted in each one of the envelopes
5. Bidding amount

*Minutes will be prepared containing the details listed above.*

# Evaluation of the Economic Offers

##  Evaluation of bidders’ eligibility

|  |  |  |  |
| --- | --- | --- | --- |
| **Name of Bidder** | **Submitted Sworn Declaration** | **It is found in the List of Prohibited Counterparts of:** | **Evaluation** |
| **IADB** | **WB** | **UN** | **OFAC** |  |
| *Name of Bidder* | *Yes/No* | *Yes/No* | *Yes/No* | *Yes/No* | *Yes/No* | Complies / Does Not Comply |
|  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |

The list of prohibited counterparts where searches were made are:

* **OFAC:**

<https://sanctionssearch.ofac.treas.gov/>

* **IDB:**

<https://www.iadb.org/es/temas/transparencia/integridad-en-el-grupo-bid/empresas-y-personas-sancionadas%2C1293.html>

* **World Bank**

<https://projects-beta.worldbank.org/en/projects-operations/procurement/debarred-firms>

* **UN**

https://scsanctions.un.org/search/

##  Validity of the Offers

* Validity of the offer required in accordance with the Base Document: *Date*
* Validity of the Bid Security required in accordance with the Base Document: *Date*

|  |  |  |  |
| --- | --- | --- | --- |
| **Name of the Bidder** | **Date to which the offer is valid** | **Date to which the bid security is valid**  | **Evaluation** |
| *Name of Bidder* |  |  | Complies / Does Not Comply |
|  |  |  |  |
|  |  |  |  |

##  Evaluation of economic offers

A detailed analysis of the economic offers of prequalified bidders was carried out, for each one of the offers, which must indicate the following:

* + Results of the rationality of the revision of the presented costs
	+ Results of the arithmetic revision
	+ Corrections and/or clarifications requested
	+ Acceptance of arithmetic corrections
	+ Results of the revision after corrections and/or clarifications
	+ Order of priority of economic offers

This information will be submitted in the following manner:

**Details of the Evaluation of Economic Offers**

**Analysis of Costs Rationality**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Bidder** | **Bidding Amount in US $** | **Initial analysis of costs rationality** | **Clarifications requested** | **Analysis of cost rationality after clarifications** | **Rational Cost** |
| Name of Bidder | Amount | * + - * Indicate “Rational Cost”.
			* Otherwise, detail the reasons why the cost is not considered rational or reasonable
 | * + - * If no clarifications have been requested, indicate “Does Not Apply”
			* Detail clarifications in reference to requested costs.
 | * + - * If no clarifications have been requested, indicate “Does Not Apply”
			* Describe the analysis of clarifications received
 | **Yes / No** |
|  |  |  |  |  |  |
|  |  |  |  |  |  |

**Arithmetic Revision**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Bidder** | **Bidding Amount** | **Arithmetic Corrections** | **Corrected Amount** | **Bidder’s Acceptance of Corrected Amount** | **Priority Order**  |
| Name of Bidder | Amount | Amount | Amount | **Yes / No / Does Not Apply** |  |
|  |  |  |  |  |  |
|  |  |  |  |  |  |

## Combined Technical – Economic Evaluation

Applies only when technical – economic offers are weighed

The combined evaluation has been carried out in accordance to the selection method stipulated in the base documents of the contest

|  |  |  |
| --- | --- | --- |
| A: Weighed Percentage of economic offer = | ***%*** |  |
| B: Weighed Percentage of technical offer =  | ***%*** |  |
| **Total** | **100 %** |  |
| **Bidder** | **Technical Score** | **Weighed Technical Score** | **Economic Score** | **Total** |
| Bidder | C | D = B x C | E | F = D + E |
|  |  |  |  |  |
|  |  |  |  |  |

C: Score established in section 2.e of this report

D: Technical Score x Weighed Percentage of technical offer

E: Score established in section 3.f of this report

F: Bidder’s Total score

## Priority Order of Offers

1. *In case of technical – economic offers weight*

*The Executive Bid/Contest Committee after performing a detailed analysis of the documentation in reference to the technical – economic offer included in the bidders’ Offer, as well as the corrections and clarifications requested, recommends that:* ***In the process*** *“Name and number of process”* **the priority order of offers is as follows:**

|  |  |  |  |
| --- | --- | --- | --- |
| **Priority Order** | **Bidder** | **Total Score Obtained** | **Nationality** |
| *1* |  |  |  |
| *2* |  |  |  |
| *n* |  |  |  |

1. *When weighing the technical – economic offers is not required*

*The Executive Bid/Contest Committee after carrying out a detailed analysis of the documentation in reference to the economic offer included in the bidder’s Offer, as well as the corrections and clarifications received that were duly requested, recommends that:*  ***In the process*** *“Name and number of process”* **the priority order of offers is as follows:**

|  |  |  |
| --- | --- | --- |
| **Priority Order** | **Bidder** | **Nationality** |
| *1* |  |  |
| *2* |  |  |
| *n* |  |  |

#  Recommendation of the Executive Committee

The Borrower/Beneficiary in agreement with the priority order of the bidders, must select one of the following options:

1. *Applies only in international processes, in which the offer in the priority order holds position No. 1 comes from an offer from a country that is not a member of CABEI.*

*It will be verified if there is any offer, within the range of up to 15% score, submitted by one or more bidders from CABEI’s member countries.*

*If it is so, the Executive Committee will recommend:*

The Executive Committee after carrying out a detailed analysis of the documentation related to the offers submitted by bidders, recommends applying Art. 6.2 of Section II of the Base Document. l

1. *In case of national process or international processes, in which the in the priority order holds position No. 1 comes from an offer from a country that is a member of CABEI.*
	* *In the case of weighing technical – economic offers*

*The Executive Committee after carrying out a detailed analysis of the documentation related to the offers submitted by bidders, recommends that:* ***In the process “Name and number of process”* the corresponding contract is adjudicated to the bidder: (*Name) of bidder for the amount of (US$ Corrected Amount)***

Because it:

1. Complies with all the requirements for prequalification
2. The technical offer obtains at least the minimum stipulated score
3. Obtains the highest weighed score
	* *In case there is no weighing of technical – economic offers*

*The Executive Committee after carrying out a detailed analysis of the documentation related to the offers submitted by bidders, recommends that:* ***In the process “Name and number of process”* the corresponding contract is adjudicated to the bidder: (*Name) of bidder for the amount of (US$ Corrected Amount)***

Because it:

1. Complies with all prequalification requirements
2. The technical offer obtains at least the minimum established score
3. Submits the lowest economic offer

# Annexes of the Report

*The Borrower/Beneficiary must include under this section all annexes of the evaluation report that apply.*

## Annexes of the Economic Evaluation

1. Communication of prior results (prequalification and technical evaluation) to each of the bidders, with the acknowledgement of receipt of each one of them
2. Protest received
3. Definite resolution of each one of the protests
4. Minutes of the opening of economic offers
5. Form ECO-1 and ECO-2, for presenting the economic offer
6. Bidder’s requests for corrections and/or clarifications of the economic offer, with the acknowledgement of receipt by the bidder
7. Answers received, correction and/or clarification of the economic offer, submitted by bidders
8. Bidder’s acceptance request of arithmetic corrections
9. Acceptance of arithmetic corrections by the bidder

## Annexes of the recommendation of the most convenient offer

1. Proofs of search in the list of prohibited counterparts