

**Borrower/Beneficiary’s**

**Logo**

**Evaluation Report of Technical Offers**

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

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

**(Modality: *Co-qualification*)**

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

***Nº ------ (process number)***



**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 an evaluation report of the technical evaluation process of a bid/contest; 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 proposals.

This report will be prepared by the Executive Bid/Contest Committee, which must include the detail on the revision, analysis, evaluation and comparison of technical 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 Chief Country Officer 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 three sections:

1. Presentation of the report
2. Evaluation of technical offers
3. Annexes of the evaluation report

For all cases, Section III Annexes, must contain the documentation related to the contents of the report, among others: requests of clarification/corrections requested, communications received, 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 Technical Offers**

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

# Presentation of the Evaluation Report

This report has been prepared by the Executive Bid/Contest Committee, which includes the results of the evaluation of the technical offers submitted to 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

This evaluation has a starting point the prequalification report of bidders, date *(Indicate date)*, in which the Executive Committee recommends that the following bidders obtained the prequalification:

|  |  |
| --- | --- |
| **No.** | **Bidder** |
| *1* |  |
| *2* |  |
| *n* |  |

## Relevant facts during the evaluation

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

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

## Opening of Technical Offer

*Write under this section a chronological description of the activity of opening the technical 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

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

# Evaluation of Technical Offers

*Describe under this section the details of the technical offer, in which only technical offers of prequalified bidders will be evaluated, considering that only the evaluation criteria included under the technical evaluation section of the Base Document of the Bid/Contest will be utilized.*

## Beginning of the evaluation of Technical Offers

*Date*

## Validity of the Proposals

* Validity of the required proposal in agreement with the Base Document: *Date*
* Effectiveness of the Bid Security required in accordance with the Base Document: *Date*

|  |  |  |  |
| --- | --- | --- | --- |
| **Name of Bidder** | **Date until which the proposal is valid** | **Date until which the Bid Security is in force** | **Evaluation** |
| *Name of Bidder* |  |  | Complies/Does Not Comply |
|  |  |  |  |
|  |  |  |  |

## Evaluation system of technical offers

1. Weight of the offers

* Technical offer weight: *Select % or Does Not Apply*
* Economic offer weight: *Select % or Does Not Apply*
* Minimum Technical Score: *Select % or Does Not Apply*

1. In accordance to the Base Document, the evaluation system of technical offers, has the following conditions:

|  |  |  |
| --- | --- | --- |
| **Evaluation Criteria** | **Score** | **Maximum Score** |
| Evaluation Criteria | Complies/Does Not Comply/Score | *%* |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |

## Detailed evaluation of bidders

A detailed evaluation of the technical offers for those prequalified bidders was carried out, and for each one the following must be indicated:

* + Results of the initial revision of the technical offer
  + Corrections and/or clarifications that were requested
  + Results of the revision after corrections and/or clarifications were made

This information will be submitted in the following manner:

**Details of the Technical Offers Evaluation**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Bidder 1: *Name of the Bidder*** | | | | |
| **Evaluation**  **Criteria** | **Observations of the Initial Revision** | **Requested corrections and/or clarifications** | **Received corrections, clarifications** | **Evaluation after correction and/or clarification** |
| *Criteria 1* | *Indicate if documentation was adjusted to the request or corrections and/or clarifications were requested* | *List of corrections and/or clarifications requested* | *Contents of corrections and/or clarifications received* | *Complies / Does Not Comply* |
| *Criteria 2* |  |  |  |  |
| *Criteria n* |  |  |  |  |

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Bidder 2: *Name of the Bidder*** | | | | |
| **Evaluation**  **Criteria** | **Observations of the Initial Revision** | **Requested corrections and/or clarifications** | **Received corrections, clarifications** | **Evaluation after correction and/or clarification** |
| *Criteria 1* | *Indicate if documentation was adjusted to the request or corrections and/or clarifications were requested* | *List of corrections and/or clarifications requested* | *Contents of corrections and/or clarifications received* | *Complies / Does Not Comply* |
| *Criteria 2* |  |  |  |  |
| *Criteria n* |  |  |  |  |

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Bidder N: *Name of the Bidder*** | | | | |
| **Evaluation**  **Criteria** | **Observations of the Initial Revision** | **Requested corrections and/or clarifications** | **Received corrections, clarifications** | **Evaluation after correction and/or clarification** |
| *Criteria 1* | *Indicate if documentation was adjusted to the request or corrections and/or clarifications were requested* | *List of corrections and/or clarifications requested* | *Contents of corrections and/or clarifications received* | *Complies / Does Not Comply* |
| *Criteria 2* |  |  |  |  |
| *Criteria n* |  |  |  |  |

## Summary of the Evaluation

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
| **No.** | **Bidder** | **Criteria No.1** | **Criteria No.2** | **Criteria No.3** | **Criteria No.4** | **Criteria No.5** | **Total** |
| *1* | *Name of bidder* | *Complies / Does Not Comply / %* | *Complies / Does Not Comply / %* | *Complies / Does Not Comply / %* | *Complies / Does Not Comply / %* | *Complies / Does Not Comply / %* | *Complies / Does Not Comply / % Total* |
| *2* |  |  |  |  |  |  |  |
| *n* |  |  |  |  |  |  |  |

## Recommendation of the Bidder’s Technical Score

*The Executive Bid/Contest Committee after conducting a detailed analysis of the documentation relating to the technical offer contained in the bidders' proposal, as well as the corrections and clarifications received that were duly requested, recommends the following evaluation of the technical offers and indicates that: bidders whose technical offer meets all the minimum conditions requested and therefore meet the conditions required to move to the offer evaluation phase which is summarized in the table below*:

|  |  |  |  |
| --- | --- | --- | --- |
| **No.** | **Bidder** | **Technical Score** | **Moves to the Economic Evaluation Phase** |
| *1* | *Name of bidder* | *Indicate:*  *Complies / Does Not Comply / %* | *Yes / No* |
| *2* |  |  |  |
| *n* |  |  |  |

# Annexes of the Report

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

## Modifications during the evaluation

1. Changes in the Executive Committee
2. Expansions on the validity of the proposals
3. Expansions of bid security
4. Others

## Prequalification Report

Non-Objection to the prequalification report in case of not sending it simultaneously with the technical evaluation.

## Annexes of the Technical Evaluation

1. Minutes of opening activity of technical offers
2. Requests of bidders for corrections and/clarifications of the technical offer, with acknowledgement of receipt by the bidder.
3. Answers received, corrections and/clarifications of technical offer, submitted by bidders.