

**The OPEC Fund for International Development**

**Standard BID EVALUATION FORM for**

**Procurment of goods, works, and non-consulting Services**

***DRAFT no. 1***

December 2024

Information for Users

This Standard Bid Evaluation Template has been prepared by the OPEC Fund for use by the Beneficiaries and their implementing agencies in the evaluation of bids, in accordance with the OPEC Fund’s Principles and Procedures for Procurement of Goods, Works and Non-Consulting Services.

This document is intended specifically for assisting in the evaluation of bids procured through “open” International Competitive Bidding (ICB), and National Competitive Bidding (NCB).

Upon notification of contract award to the successful bidder by the Beneficiary, and in accordance with the General Conditions of the Financing Agreement, the OPEC Fund is authorized to publish a description of the contract, the name and nationality of the bidder to whom the contract was awarded, and the contract price.

Users of this evaluation report template are invited to submit comments on their experience with the document to:

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How to use these Forms

This **Bid Evaluation Report (BER)** Template has been prepared by the OPEC Fund for use by Beneficiaries. The BER Template provides step-by-step procedures for the evaluation of bids solicited through International Competitive Bidding (ICB) and is consistent with the OPEC Fund’s *Principles* *for Procurement of Goods, Works, and Services (“Principles”)* and *Procedures for Procurement of Goods, Works and Non-Consulting Services* (“*Procedures*”) under OPEC Fund Project Financing.

Users should note that evaluation and the resulting report need not necessarily be lengthy. Procurement of off-the-shelf goods without domestic preference can usually be quickly and easily evaluated. In general, the complexity of evaluation lies with larger works and with the supply and installation of industrial plant and equipment. The forms should invariably accompany the evaluation report, but they may be adapted to suit specific requirements of the bidding documents. The report should include a number of attachments to explain details of bid evaluation or to show specific controversial wording or numbers in a bid. Cross-referencing should be used extensively, as well as references to pertinent clauses in the bidding documents.

Special mention should be made of contracts that group together (“package”) smaller contracts (“lots”—also called “slices,” or “items”), which may be awarded as a package to one bidder, or as sub-packages of one or more lots to several bidders. In such instances the bid evaluation is to be done separately, including any allowances for domestic preference, for each lot, subject to any cross-discounting (see Appendix I). Only *Tables 1, 2,* and *3* will be common to all.

Beneficiaries should study these evaluation forms and guide during project preparation, in order to properly assess the managerial and administrative conditions needed for bid evaluation. Fund staff are available to explain the procedures, including any modifications necessary for evaluation using bidding documents other than those Standard Bidding Documents (SBDs) presently available. The Fund encourages the employment of experienced consultants to help in evaluations for complex contracts. Consultant fees can be paid from Fund financing, if allowed for in the Financing Agreement.

*Note*: The tables and forms in this template may be locally edited to incorporate additional space for the requested information, logos or branding, or additional requirements as deemed necessary.

Letter of Transmittal

The bid evaluation report should be attached with a Letter of Transmittal from the Beneficiary ministry, department, or agency responsible for communications with the Fund.

The letter should highlight conclusions and offer any additional information that would help to expedite review by the Fund. In addition, any unresolved or potentially contentious issues should be highlighted.

**Bid EVALUATION REPORT**

**and**

**Recommandation for award of contract**

Title of Contract: [insert title]

RFP No.: *[insert reference number]*

Project Name*: [insert project name]*

Executing Agency*: [insert name of the implementing agency]*

Financier*: [insert name of the financing Institution]*

Date of submission*: [insert date]*

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# **General Information**

**Background**

* *[Provide Brief description of project and contract.]*

**Summary of evaluation process**

* *[Key dates.]*
* *[Issues encountered.]*
* *[Application / Bids/Proposals.]*
* *[Any complaints and their resolution.]*

**Environmental and Social** *[if applicable.]*

* *[Provide a summary of ES issues and risks, findings and recommendations.]*

**Recommendation**

* *[Provide a summary of findings, conclusions, and key recommendations.]*

**Attachments**

* *[Any other relevant information or document, please list here.]*

# **Tables**

## **Table 1. Identification**

|  |  |
| --- | --- |
| * 1. Name of Beneficiary
 |   |
| * 1. Fund Financing number
 |   |
| * 1. Date of effectiveness
 |   |
| * 1. Closing date:
1. Original
2. revised
 |    |
| * 1. Name of project
 |   |
| * 1. Purchaser (or Employer)
1. name
2. address
 |    |
| * 1. Contract number (identification)
 |   |
| * 1. Contract description
 |   |
| * 1. Cost estimate1
 |   |
| * 1. Method of procurement (check one)
 | ICB NCB  |
| * 1. Member Country Preference (Goods)?
 | Yes No  |
| * 1. Domestic preference (Works)?
 | Yes No  |
| * 1. Fixed price contract
 | Yes No  |
| * 1. Cofinancing, if any:
1. agency name
2. percent financed by agency
 |    |
| 1 Cite source and date if other than Appraisal Report. |

## **Table 2. Bidding Process**

|  |  |
| --- | --- |
| * 1. General Procurement Notice issue date
 |  |
| * 1. Prequalification, if required
1. number of firms prequalified
2. date of Fund’s no-objection
 |    |
| * 1. Specific procurement notice
1. name of Beneficiary website
2. issue date
3. name of international publication
4. Fund Website date
5. issue date
 |       |
| * 1. Bidding Document
1. title, publication date
2. date of Fund’s no-objection
3. date of issue to bidders
 |     |
| * 1. Number of firms issued documents
 |   |
| * 1. Amendments to documents, if any
1. list all issue dates
2. date(s) of Fund’s no-objection
 | 1. 2. 3. 1. 2. 3.  |
| * 1. Date of pre-bid conference, if any
 |   |
| * 1. Date minutes of conference sent to bidders and Fund
 |   |

## **Table 3. Bid Submission and Opening**

|  |  |
| --- | --- |
| * 1. Bid submission deadline
1. original date, time
2. extensions, if any
 |    |
| * 1. Bid opening date, time
 |   |
| * 1. Record of bid opening, date sent to Fund
 |   |
| * 1. Number of bids submitted
 |   |
| * 1. Bid validity period (days or weeks)
1. originally specified
2. extensions, if any
3. date of Fund’s no-objection, if required[[1]](#footnote-1)
 |     |
|  |

## **Table 4. Bid Prices (as Read Out)**

|  |  |  |
| --- | --- | --- |
| **Bidder Identification** | **Read-out Bid Price(s)[[2]](#footnote-2)** | **Modifications or** |
| **Name** | **City/State or Province** | **Country** | **Currency(ies)** | **Amount(s) or %** | **Comments[[3]](#footnote-3)** |
| ***(a)*** | ***(b)*** | ***(c)*** | ***(d)*** | ***(e)*** | ***(f)*** |
|  |  |  |  |  |  |
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| etc. |  |  |  |  |  |
|  |

## **Table 5A. Preliminary Examination**

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| **Bidder** | **Verification** | **Eligibility** | **Bid Security** | **Completeness of Bid** | **Substantial Responsiveness** | **Acceptance for Detailed Examination** |
| ***(a)*** | ***(b)*** | ***(c)*** | ***(d)*** | ***(e)*** | ***(f)*** | ***(g)*** |
|  |  |  |  |  |  |  |
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|  |  |  |  |  |  |  |
| etc. |  |  |  |  |  |  |
| **Note**: For explanations of headings, see Annex I, para. 5 herein. Additional columns may be needed, such as for responsiveness to technical conditions. See example in Annex IV. |

## **Table 5B. Preliminary Examination (Technical Responsiveness)**

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| Bidder(a) | Technical Specs. 1 (indicateprovisions in Bid Doc)[[4]](#footnote-4)(b) | Technical Specs. 2(indicate Provisions in Bid Doc)(c) | Technical Specs. 3(indicate provisions in Bid Doc)(d) | Technical Specs. 4(indicate provisions in Bid Doc)(e) | SubstantialTechnical Responsiveness[[5]](#footnote-5)(f) | Acceptance for Detailed Examination(g) etc. |
|  |  |  |  |  |  |  |
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|  |

## **Table 6. Corrections and Unconditional Discounts**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Bidder | Read-out Bid Price(s) | Corrections | Corrected Bid Price(s) | Unconditional Discounts[[6]](#footnote-6) | Corrected/Discounted Bid Price(s)[[7]](#footnote-7) |
|  | Currency(ies) | Amount(s) | Computational Errors[[8]](#footnote-8) | Provisional Sums |  | Percent | Amount(s) |  |
| *(a)* | *(b)* | *(c)* | *(d)* | *(e)* | *(f) = (c) + (d) - (e)* | *(g)* | *(h)* | *(i) = (f) – (h)* |
|  |  |  |  |  |  |  |  |  |
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|  |  |  |  |  |  |  |  |  |
| etc. |  |  |  |  |  |  |  |  |
| **Note**: Only bids accepted for preliminary examination (Table 5, column *g*) should be included in this and subsequent tables. Columns *a*, *b*, and *c* are from Table 4 (columns *a*, *d*, and *e*, respectively). |

## **Table 7. Exchange Rates**

Currency Used for Bid Evaluation:

Effective Date of Exchange Rate:

Authority or Publication Specified for Exchange Rate:

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

## **Table 8. Currency Conversion (Multiple Currencies)**

Specify Evaluation Currency:

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Bidder | Currency(ies) of Bid | Corrected/Discounted | Applicable | Evaluation Currency |
|  |  | Bid Price(s) | Exchange Rate(s)[[9]](#footnote-9) | Bid Price(s) | Total Bid Price[[10]](#footnote-10) |
| *(a)* | *(b)* | *(c)* | *(d)* | *(e) = (c) x (d)* | *(f)* |
|  |  |  |  |  |  |
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|  |  |  |  |  |  |
|  |  |  |  |  |  |
| etc. |  |  |  |  |  |

## **Table 9. Currency Conversion (Single Currency)**

Specify Evaluation Currency:

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| Bidder | Corrected/Discounted | Payment Composition | Exchange | Amounts in | Exchange | Evaluation Currency |
|  | Bid Price(in specified currency) | Currency of Payment | Percent of Total Bid | Amount in Evaluation Currency | Rate Used by Bidder | Currency of Payment | Rate for Evaluation | Bid Prices | Total |
| *(a)* | *(b)* | *(c)* | *(d)* | *(e) = (b) x (d)* | *(f)* | *(g) = (e) x (f)* | *(h)* | *(i) = (g) x (h)* | *(j)* |
|  |  |  |  |  |  |  |  |  |  |
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| etc. |  |  |  |  |  |  |  |  |  |
|  |

## **Table 10. Additions, Adjustments, and Priced Deviations**

Specify Evaluation Currency:

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Bidder | Corrected/Discounted Bid Price[[11]](#footnote-11) | Additions[[12]](#footnote-12) | Adjustments | Priced Deviations | Total Price |
| *(a)* | *(b)* | *(c)* | *(d)* | *(e)* | *(f) = (b) + (c) + (d) + (e)* |
|  |  |  |  |  |  |
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|  |  |  |  |  |  |
| etc. |  |  |  |  |  |

## **Table 11 A. Domestic Preference for Goods & Related Services**

Specify Evaluation Currency: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
| Bidder | Preference Group[[13]](#footnote-13) | Total Price[[14]](#footnote-14) | Exclusions for Preference[[15]](#footnote-15) | Revised Total | MC Preference[[16]](#footnote-16) (%) | Preference Price[[17]](#footnote-17) | Total Comparison Price |
| *(a)* | *(b)* | *(c)* | *(d)* | *(e) = (c) – (d)* | *(f)* | *(g)* | *(h) = (c) + (g)* |
|  |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |
| etc. |  |  |  |  |  |  |  |

## **Table 11 B. Domestic Preference for Works**

Specify Evaluation Currency: \_\_\_\_\_\_\_\_\_\_\_

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| Bidder | Preference Group[[18]](#footnote-18) | Total Price[[19]](#footnote-19) | Exclusions for Preference[[20]](#footnote-20) | Revised Total | Preference[[21]](#footnote-21) | Total Comparison Price |
| *(a)* | *(b)* | *(c)* | *(d)* | *(e) = (c) – (d)* | *(f)* | *(g) = (c) + (f)* |
|  |  |  |  |  |  |  |
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|   |

## **Table 12. Proposed Contract Award**

|  |  |
| --- | --- |
| 1. Bidder offering the most Value for Money (proposed for contract award).1. Name
2. Address
 |    |
| 2. If bid submitted by agent, list actual supplier.1. Name
2. Address
 |    |
| 3. If bid from joint venture, list all partners, nationalities, and estimated shares of contract. |   |
| 4. Principle country (ies) of origin of goods/materials. |   |
| 5. Estimated date (month, year) of contract signing. |   |
| 6. Estimated delivery to project site/completion period. |   |
|  | Currency(ies) | Amount(s) or % |
| 7. Bid Price(s) (Read-out)[[22]](#footnote-22) |  |  |
| 8. Corrections for Errors[[23]](#footnote-23) |  |  |
| 9. Discounts[[24]](#footnote-24) |  |  |
| 10. Other Adjustments[[25]](#footnote-25) |  |  |
| 11. Proposed Award[[26]](#footnote-26) |  |  |
| 12. Disbursement Category[[27]](#footnote-27) |   |

# **Appendices**

## **Appendix I: Bid Evaluation Guide**

*[Executing Agencies are responsible for preparing Bid Evaluation Report for every procurement package. The evaluation report shall record entire events of procurement process supported by additional information using the templates provided in the form of Tables and Annexes.*

*Users of this templates are advised to note that the text contained in the BER template are in the form of guidance note and each user should modify the text as appropriately to suit the specific needs. The Evaluation Report should broadly cover the following aspects of bidding procedures].*

**Identification, Bidding Process, and Bid Submission**

Tables 1, 2, and 3 provides for the filing of basic information on the procurement process. This information is necessary to monitor compliance with the Financing Agreement.

**Bid Opening**

All bidders or their representatives are invited to attend the bid opening, where bids are read out and recorded, along with a list of attendees. The record is prepared for prompt transmittal to the Fund. Copies should be sent to all bidders and if available, upload it on the Executing Agencies’ website. Bid opening procedures are described in the Instructions to Bidders (ITB). To assist in carrying out the opening and preparing of the record, a checklist is provided in Appendix II. The checklist should preferably be filled out for each bid during the actual reading out at the meeting including complaints and discounts, if any. The reading should be from the original version of each bid, the actual amounts, and other key details readout should be circled for later verification. If bids are expressed in a single currency, other currency needs expressed as a percentage should be recorded. It may also be desirable to read out exchange rates used by bidders (Appendix).

Any envelopes containing substitutions, modifications, or withdrawals must be subject to the same level of scrutiny, including the reading out of critical details, such as price changes. Failure to read out such information and include it in the written record my result in denial of its inclusion in bid evaluation. If a bid has been withdrawn, it should nonetheless be read out and should not be returned to the bidder until the authenticity of the withdrawal notice has been confirmed.

As stated in the ITBs, ***no bids shall be rejected at the bid opening except those received after the deadline for receipt of bids***. Such bids shall be returned unopened to the bidder. A summary of the read-out bid prices should be provided in *Table 4*.

**Bid Validity**

The duration of the validity of each bid should be as required in the ITB and should be confirmed in the signed Form 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. Extensions to the validity of bid security should also be requested of bidders, if necessary[[28]](#footnote-28) and such extensions should be recorded in *Table 3*.

Note that a no-objection by the Fund is necessary for extensions longer than forty-five (45) calendar days (except as otherwise agreed) and for any subsequent extensions.

**Principles of Evaluation**

After the public opening of bids, information relating to the examination, clarification, and evaluation of bids shall not be disclosed to bidders or other persons not officially concerned with this process until the Notification of Intention to Award the Contract is notified to all bidders by the Beneficiary (or Implementing Agency). The Fund recommends appointment by the Beneficiary of an evaluation committee, consisting of a minimum of three qualified members who should work in a secure office where all bidding documents can be kept. There may be considerable benefit to appointing to the evaluation committee some members who have participated in the preparation of the bidding documents, as they would be familiar with the same.

On occasion, the Beneficiary may request clarification from bidders concerning ambiguities or inconsistencies in the bid. As required in the ITBs, such requests shall be in writing, and no change in the price or scope of the originally offered goods, works, or services shall be sought or accepted, except for the correction of arithmetic error. The responses from bidders shall also be in writing. No circumstances shall justify meetings or conversation between the Beneficiary (or its consultants) and bidders during the bid evaluation process.

Bidders frequently attempt to contact the Beneficiary during bid evaluation, directly or indirectly, to query progress of evaluation, to offer unsolicited clarifications, or to provide criticisms of their competitors. Receipt of such information should be acknowledged as to receipt only. On occasion, bidders approach the Fund with information. The Fund’s policy is to acknowledge the correspondence and usually pass it on to the Beneficiary for its consideration. Beneficiaries must evaluate bids on the basis of the information provided in the respective bids. However, additional information provided may be useful in improving the accuracy, speed, or fairness of the evaluation. ***Nonetheless, no changes in the bid price or substance are allowed after the deadline for Bid submission*.**

**Preliminary Examination of Bids**

The evaluation process should begin immediately after bid opening. The purpose of preliminary examination is to identify and reject bids that are incomplete, invalid, or substantially nonresponsive to the bidding documents and therefore, are not to be considered further (*Table 5A*). The following checks should be applied:

1. ***Verification***: Attention should be directed toward deficiencies that, if accepted, would provide unfair advantages to the bidder. Sound judgment must be used: for example, simple omissions or mistakes arguably occasioned by human error should not be grounds for rejection of the bid. Rarely is a bid perfect in all respects. However, the validity of the bid itself, for example, its signatures, must not be in question. If the bidder is a joint venture, the joint venture agreement (or a letter of intent to enter in a JV) must be submitted; if the bidder is an agent, an authorization from the supplier or manufacturer must be provided in addition to any documentation required of the supplier or manufacturer itself. All copies of the bid should be compared with the original and corrected accordingly, if necessary. Thereafter, the original should be kept in a safe location, and only copies should be used in evaluation.
2. ***Eligibility***: The bidder must be a national or a juridic entity from an eligible source country. All partners to a joint venture shall be from an eligible source country, and the joint venture shall be registered in jurisdiction of an eligible source country. All goods and services shall originate from eligible source countries. In the case of plant and equipment, this eligibility test is applied only to the finished product offered in the bid and to its major and clearly identifiable components. If prequalification has taken place, only bids from prequalified bidders can be considered.[[29]](#footnote-29) The bidder (including all members of a joint venture and subcontractors) may be disqualified if affiliated with a firm that has provided related consulting services on the project, or if the bidder has a conflict of interest, or if the bidder is a publicly owned enterprise from the Beneficiary’s country, lacking legal and financial autonomy (See the ITB for details.). Use Appendix III to perform Eligibility test and confirm all qualified bidders meet the eligibility criteria.
3. ***Bid Security***: The bidding document may require submission of a bid security or bid bond as the case may be. If so, specified in the Bid Document, the bid security must conform to the requirements of the ITB, and it must accompany the bid. If the bid security is issued as a bank guarantee, it must be consistent with the wording of the Bid Security Form provided in the bidding document. Submission of a copy of the security or submission of a counter guarantee naming the Beneficiary’s bank instead of the Beneficiary is unacceptable. Furthermore, securities for an amount smaller or for a period shorter than the one specified in the ITB are not acceptable. The security for a bid submitted by a joint venture should be in the name of all of the partners of the joint venture (i.e. it should secure the bid from the JV, and not a bid from one of its partners, as such bid does not exist).
4. ***Completeness of Bid***: Unless the bidding documents have specifically allowed partial bids (permitting bidders to quote for only select items or for only partial quantities of a particular item), bids not offering all of the required items should ordinarily be considered nonresponsive. However, under works contracts, missing prices for occasional work items are considered to be included in prices for closely related items elsewhere (see ITB). If any erasures, interlineations, additions, or other changes have been made, they should be initialed by the bidder. They may be acceptable if they are corrective, editorial, or explanatory. If they are not, they should be treated as deviations and should be analyzed as per para. 5.1 (e) below. Missing pages in the original copy of the bid may be a cause for rejection of the bid, as may contradictions in model numbers or other designations of critical supply items.
5. ***Substantial Responsiveness***: Major deviations to the commercial requirements and technical specifications are a basis for the rejection of bids. As a general rule, major deviations are those that, if accepted, would not fulfill the purposes for which the bid is requested, or would prevent a fair comparison with bids that are properly compliant with the bidding documents. Examples of major deviations include:
6. stipulating price adjustment when fixed price bids were called for;
7. failing to respond to specifications by offering instead a different design or product that does not offer substantial equivalence in critical performance parameters or in other requirements;
8. phasing of contract start-up, delivery, installation, or construction not conforming to required critical dates or progress markers;
9. subcontracting in a substantially different amount or manner than that permitted;
10. refusing to bear important responsibilities and liabilities allocated in the bidding documents, such as performance guarantees and insurance coverage;
11. taking exception to critical provisions such as applicable law, taxes and duties, and dispute resolution procedures;
12. those deviations that are specified in the ITB as requiring rejection of the bid (such as, in the case of works, participating in the submission of another’s bid other than as a subcontractor).

Bids that offer deviations may be considered substantially responsive (at least as to the issue of fairness) if the deviations can be assigned a monetary value that would be added as a penalty during the detailed evaluation process and if such deviations would be acceptable in the eventual contract.

The results of preliminary examination should be presented in *Table 5A*. If the bid fails preliminary acceptance, the reasons must be clearly explained in footnotes or in an attachment, as necessary. An example is shown in Appendix IV. The Executing Agency may find it useful to include additional tables for itemization of responsiveness to a list of technical or commercial specifications. These should be attached to *Table 5)*.

**Detailed Examination of Bids**

Only those bids surviving preliminary examination need to be examined in this phase.

1. ***Corrections for Errors***: The methodology for correction of computational errors is described in the ITB. The read-out bid prices including discounts, (if any) and their corrections should be noted in *Table 6*. The corrections are considered binding on the bidder. Unusual or large corrections that could affect the comparative ranking of bids should be explained in footnotes.
2. ***Corrections for Provisional Sums***: Bids may contain provisional sums set by the Beneficiary for contingencies or for nominated subcontractors, etc. As these sums are the same for all bids, they should be subtracted from the read-out prices in *Table 6*, to allow for a proper comparison of bids in subsequent steps. However, those provisional sums set aside for Daywork, where priced competitively, should not be included in the deductions.
3. ***Modifications and Discounts***: In accordance with the ITB, bidders are allowed to submit, prior to bid opening, modifications to their original bid. The impact of modifications should be fully reflected in the examination and evaluation of the bids. These modifications may include either increases or discounts to the bid amounts that reflect last-minute business decisions. Accordingly, the original bid prices should be modified at this point in the evaluation. Discounts offered in accordance with the ITB that are conditional on the simultaneous award of other contracts or lots of the contract package (cross-discounts) shall not be incorporated until the completion of all other evaluation steps. The effect of unconditional discounts (or alternatively, increases) should be shown as in *Table 6*. Any discount expressed in percent must be applied to the appropriate base specified in the bid (i.e., check to see if it applies to any provisional sums).
4. ***Evaluation Currency***: The remaining bids as corrected for computational errors and as adjusted for discounts should be converted to a common evaluation currency, as described in the ITB. The exchange rates to be used in the calculations are to be listed in *Table 7*. Where exchange rates for a particular currency are not available from the specified authority or publication, identify the secondary source, as well as any necessary conversion calculations.
5. ***Additions***: Omissions to the bid should be compensated for by adding the estimated cost for remedying the deficiency. Where items missing in some bids are present in others, an average of quoted prices or the highest quoted price (as indicated in the BDS) would be used to compare competitors’ bids. Alternatively, external sources, such as published price lists, freight tariff schedules, etc., may be appropriate. Cost determined should be expressed in the evaluation currency and shown in *Table 10*.
6. **Adjustments**: The ITB specifies that, if any, performance or service factors will be considered in the bid evaluation. The methodology used in evaluation of these factors should be precisely described in the bid evaluation report and should be fully consistent with the ITB provisions. Bonuses or additional credits that reduce the evaluated bid price will not be given in the bid evaluation for features that exceed the requirements stated in the bidding documents, unless specifically provided for in the ITB[[30]](#footnote-30). The value of adjustments will be expressed in terms of cost, for all works and most goods contracts, and should be shown in *Table 10* and expressed in the evaluation currency[[31]](#footnote-31).
7. ***Priced Deviations***: As discussed, bids with minor deviations may be considered substantially responsive if their further consideration assigns a monetary cost or penalty to the bid for the purpose of bid comparison.
8. Request for deviations that are expressed by the bidder in vague terms, such as “*we would like an increase in the amount of mobilization advance*” or “*we wish to discuss changes in the completion schedule*” should ordinarily be ignored in bid evaluation. However, a categorical statement by the bidders taking exception to a requirement in the bidding documents should be treated as a deviation.
9. If a bid requires a faster payment stream than specified in the bidding documents, the penalty is based on the prospective benefit to the bidder.
This situation assumes use of a discounted cash flow using the prevailing commercial bank charge rates for the currencies of the bid, unless the ITB foresees the eventuality and specifies a rate.
10. If a bid provides for delivery or completion beyond the date specified in the bidding documents but that is nonetheless technically acceptable to the Beneficiary, the time advantage given should be assessed based on a penalty specified in the ITB or, if one is not provided, based on the rate of liquidated damages specified in the bidding documents. The deviations should be priced in the evaluation currency in *Table 10*.
11. ***Abnormally low bids***: An abnormally low Bid (typically in Works contracts) is one in which the Bid price (in combination with other elements of the Bid) appears so low that it raises material concerns of the Beneficiary as to the capability of the Bidder to perform the contract for the offered price. The Beneficiary shall seek written clarifications from the Bidder where the Beneficiary identifies a potential abnormally low Bid, including detailed price analyses of its Bid price in relation to the subject matter of the contract, scope, proposed methodology, schedule, allocation of risks and responsibilities and any other requirements of the Bidding Documents. If, after evaluating the Bidder’s price analyses, the Beneficiary determines that the Bidder has failed to demonstrate its capability to deliver the contract for the offered price, the Beneficiary, if provided for in the Bidding Documents may reject the Bid subject to Fund’s No-objection (if applicable). In such situation, the Evaluation Committee must carry out due diligence and document its findings and recommendations in the Bid Evaluation Report (*Table 6*).

**Determination of Award**

In the comparison of bids for works and for most goods, the corrected and discounted bid prices, together with adjustments for omissions, deviations, and specified evaluation factors, have been noted in *Table 10*. The bidder with the lowest total is the bidder offering the most Value for Money (VfM) at this stage, unless other factors are considered to determine what is the Most Economically Advantageous Bid, subject to:

1. application of any discounts, contingent on the simultaneous award of multiple contracts or lots;
2. post-qualification evaluation, or, if prequalification has occurred, confirmation of prequalification information;
3. ***Margin of Preference***: If margin of preference is allowed in bid evaluation, the ITB will so state and provide detailed procedures to be used in determining the eligibility for preference and the amounts.
4. with respect to goods contracts, eligibility of goods for preference must be examined according to the criteria described in the ITB. The calculations for determining the bidder offering the most VfM are based on a two-step process. In the second step, if needed, the preference margin is added (like a tariff) to the Cost Insurance Freight (CIF) or Carriage and Insurance Paid To (CIP) bid prices of the goods offered from non-preference countries. Care should be taken to separate these prices from the overall bid prices, which may include the costs of in-country transportation, related freight insurance, installation, training, and other costs incurred within the Beneficiary’s country. Such costs are not to be adjusted for the preference. The CIF or CIP bid prices used will reflect corrections for errors and discounts and will be adjusted for omissions pertaining to the CIF or CIP prices (such as insufficient spare parts). They will not reflect adjustments for deviations or specified evaluation factors. The preference tariff calculated will be added to the corrected, discounted, and adjusted total prices tabulated in *Table 11A*. All calculations involved in assessing preference should be clearly shown in *Table 11A*, together with accompanying explanations as necessary. The bidder offering the most Value for Money would be the bidder with the lowest price total in column (h), unless footnote 2 of *Table 11A* applies.
5. any preference eligibility allowed under works contracts is dependent on ownership criteria. The preference is provided by adding 7.5% (percent) to the corrected and discounted bid prices of bidders not eligible for preference. The ITB excludes preference application to any provisional sums, as well as to adjustments or priced deviations. The lowest evaluated bidder is the bidder with the lowest total in column (g) of *Table 11B*.
6. ***Cross-Discounts***: These are conditional discounts offered in the event that more than one contract or lot will be awarded to the same bidder. Bid evaluation in such cases can be quite complicated, particularly for goods contracts where domestic preference may apply. The sizes of cross-discounts offered by each bidder may vary with the potential number of contracts awarded. The ITB may also limit the number or total value of awards to a bidder on the basis of its financial and technical capacity[[32]](#footnote-32).Thus, a bidder offering the lowest evaluated bid on a particular contract may be denied award because of such a restriction. The Beneficiary shall select the optimum combination of awards on the basis of least overall cost of the total contract package, consistent with the qualification criteria. ***Presentations of the calculations should be made on an attachment to the report, which should include the bid evaluation(s) for the other contracts, if they have been evaluated separately***.
7. ***Qualification***: If prequalification was conducted, the bidder whose bid is the lowest evaluated should receive the award, unless after the bids were launched the bidder’s qualifications have materially deteriorated or the bidder has received additional work that over-stresses its capacity. The Beneficiary should satisfy itself fully on both accounts. ***Where pre-qualification has not occurred, the bidder who would be selected for the award should be subjected to post-qualification, the procedures for which are described in the ITB***.
8. If the lowest evaluated bidder fails during post-qualification, its bid should be rejected, and the next ranked bidder should then be subject to post-qualification examination. If successful, this bidder should receive the award. If not, the process continues. The rejection of a bid for reasons of qualification requires substantial justification, which should be clearly documented in attachments to the report. A history of poor performance may be considered a substantial justification (provided, it is supported by documentary evidence).
9. ***Alternative Bids***: The ITB may request or allow bidders to submit alternative bids under the stipulation that only the alternative submitted by the lowest evaluated bidder and conforming to the bidding documents will be considered.
10. for works, the ITBs may allow alternative technical solutions and/or alternative times for completion.
11. for goods, the ITB may allow for submission of alternative payment schedule. The same ITB may also require bidders to submit, in addition to any CIF or CIP bids, similar bids, less transport or insurance, such as Free Carrier (FCA), Cost and Freight (CFR), and other definitions found in the International Commercial Terms of Sale (INCOTERMS) 2020. The Beneficiary, if it is willing to accept the alternative bid offered by the lowest evaluated bidder, should provide justification for doing so[[33]](#footnote-33). Calculations for the evaluation of alternatives should be provided in an attachment to the report.
12. ***Proposed Award***: The amount of the proposed award shall be the bid price as submitted by the winning bidder and adjusted as described in the ITB for corrections, any discounts (including cross-discounts), and acceptance by the Beneficiary of alternative offers from the lowest evaluated bidder. Adjustments to the final price and scope of the contract to correct for acceptable omissions and quantity variations in the bid may be negotiated with the lowest evaluated bidder. Prior concurrence or no-objection of the Fund with the proposed award is required before such negotiations may be entered into, unless post review procedures are applicable. *Table 11* should be filled out to establish the actual amount of the contract award.
13. The Beneficiary may consider rejection of **ALL Bids** (with prior concurrence from the Fund) if: (a) none of the bids are found to be responsive; (b) bids are unreasonably high in price compared with earlier estimates, or (c) none of the bidders are qualified.
14. **Report Submission**
15. ***Prior Review***: In accordance with the Financing Agreement, the Beneficiary must submit the completed bid evaluation report containing the required summary to the Fund as soon as possible after bid opening, preferably no later than three (3) weeks prior to the expiration of the bid validity period. The report should include the appropriate items listed in this BER template. *Beneficiaries are encouraged to request assistance as needed from the Fund in explaining the evaluation procedures. However, the Fund will not participate in the evaluation itself*.
16. ***Post Review***: The Financing Agreement may provide that for contracts up to an amount to be specified in the Financing Agreement or Procurement Plan, the Beneficiary may proceed with the appropriate procurement procedure without the prior review of the Fund. Where Post Reviews apply, the Beneficiary shall retain all procurement documentation with respect to each contract not governed by Prior Review. This includes: (a) all Bidding Documents; (b) records of selection of Contractors; (c) documentation relating to project implementation, and all records up to two (2) years after the closing of the Financing Agreement or as determined by the Financing Agreement. The Fund may subsequently carry out a Post Review of the documentation to determine whether the contracts were awarded in compliance with the agreed Procedures and the Financing Agreement.
17. ***Prior Review by the Fund*:** All contracts subject to Prior Review will be reviewed by the Fund before contract award. Beneficiaries may be requested to provide additional information and justification for the recommendations for contract award. The Fund will not contact bidders. However, it may request the Beneficiary to do so for necessary clarifications. When the Fund is satisfied with the evaluation of bids and recommendations of award, a “no-objection” written communication will be issued by the Fund official designated for such correspondence.
18. Beneficiaries should ensure that all correspondence received from bidders concerning evaluation has been considered. The Fund does not finance contracts that have not been procured in accordance with the Financing Agreement[[34]](#footnote-34).

**Recommendation of Contract Award**

Following the detailed evaluation of the bids, the Bid Evaluation Report (BER) should be submitted to the Fund for no-objection along with the Project Vendor Integrity Due Diligence (IDD) Form. The BER shall make a clear recommendation for the award of the Contract, with full name of the recommended bidder including their JV members, country of origin, contract amount and the currency of the contract. The IDD will be performed only for the recommended Bidder using the checklist (Appendix IV). In case of JV, the evaluation committee is required to perform IDD check on every JV member.

Upon receipt of no-objection, the Beneficiary will sign the contract and publish Contract Award Notice on an appropriate platform. The Beneficiary is also required to submit a copy of signed Contract along with Contract Award Notice to the OPEC Fund. The OPEC Fund will publish the Contract Award Notice on OPEC Fund’s external website and other platforms as appropriately. The Bid Securities of unsuccessful bidders may be returned as promptly as possible. If the effectiveness of contract is contingent on the receipt of a performance security or other conditions, the Beneficiary may consider seeking an appropriate extension of time for the bid validity and the accompanying bid security of the next two lowest bidders. All information related to Bids including BER should be held in confidence. Unsuccessful bidders may seek debriefing hereafter.

## **Appendix II: Bid Opening Checklist**

(To be filled out for each bid as it is read out)

Contract Reference:

Bid Opening Date: Time:

Name of Bidder:

1. Is outer envelope of bid sealed?
2. Is bid form completed and signed?
3. Expiration date of bid:
4. Is documentary authority for signing enclosed?
5. Amount of bid security (if required): (state currency)
6. Presence of Bid Securing Declaration (if required):
7. Describe any “Substitution,” “Withdrawal,” or “Modification” submitted
8. Describe any alternative bid made:
9. Describe any discounts or modifications offered:
10. Additional comments:[[35]](#footnote-35)
11. Name of bidder or representative present:
12. Total bid price: (list currencies and amounts or percentages)[[36]](#footnote-36)

Signature of responsible official: Date:

## **Appendix III: Eligibility for provision of Goods, Works and Services in Fund-Financed Procurement**

The Fund’s *Principles for Procurement of Goods, Works and Services*provides the following in paragraph:

**I. Eligibility**

1. **OPEC Fund Requirements**: Eligibility of an individual, firm or other entity for participation in a procurement process for acquisition of goods, works and/or services will be determined in accordance with the specific eligibility requirements of OPEC Fund, including the application of any national or similar preference or weighting, as the case may be, pursuant to the terms of paragraph K of these Principles.
2. **Exclusions**: A Bidder or Proposer from a country may be excluded if:
3. as a matter of law or official regulation, the Beneficiary’s country prohibits commercial relations with that country; or
4. by an act of compliance with a decision of the United Nations Security Council taken under Chapter VII of the Charter of the United Nations the beneficiary’s country prohibits any imports of Goods from, or payments to, a particular country, person or entity; or
5. there is a breach of requirements/prohibited practices as listed in the OPEC Fund Business Partner Code of Conduct, Compliance Policy, Business Integrity – Know Your Customer Governance Documents, paragraph F, G, H and L of these Principles, including related Procedures or Guidance Notes; or
6. such exclusion is in accordance with *Sanctions Guidelines* of OPEC Fund, or the Co-financiers as elaborated under (C) below.
7. **Sanctions**: An individual, firm or other entity declared ineligible by the Co-financiers in accordance with the *Sanctions* *Guidelines* shall be ineligible to be awarded a contract, or to materially benefit therefrom, financed by one or more Co-financier during the period of time determined by the Co-financier as applicable to such sanctioned individual, firm or entity.
8. **Withholding Eligibility Information**: In cases of withholding of information to evade disqualification on account of any eligibility requirement, the Beneficiary will have the right to cancel the contract at any time and also to penalize the withholding bidder or proposer, and claim compensation for losses incurred by the Beneficiary and/or such OPEC Fund, as a consequence thereof. OPEC Fund reserves the right not to finance any contract if the supplier, contractor, and/or consultant involved is found to be ineligible based on the applicable eligibility requirements required under the policies and procedures of OPEC Fund and as set forth herein.
9. **State Owned Enterprises (SOEs)**: SOEs in the Beneficiary’s country may participate only if they can establish that they:
10. are legally and financially autonomous of the beneficiary;
11. operate under commercial law; and
12. are not dependent on the budget of the beneficiary’s government.

While preparing the BER, the Beneficiary or Executing Agency is required to check eligibility requirements of the Bidders considering the factors mentioned in paragraph A to E above. The BER shall confirm that all qualified Bidders meet the eligibility criteria (Table 5).

## **Appendix IV: Project Vendor Integrity Due Diligence (IDD) Form**

**Introduction:** It is the primary responsibility of Executing Agencies (EA) to manage integrity risks related to projects being financed by the OPEC Fund for International Development (OPEC Fund). Integrity risks include fraud, corruption, money laundering, terrorism financing, and payment risks tied to financial sanctions. In this context, the EA is responsible for conducting adequate IDD on project vendors, that are providing goods or services related to OPEC Fund financed projects. This IDD Form is to be completed by EA and submitted to the OPEC Fund, as part of the No Objection request for the recommended bidder (prospective Contractor). If the recommended bidder is a JV, IDD will be performed on all the JV members.

1. **Reference Checks:** A minimum of 3 reference checks are to be conducted with prior project Executing Agencies for projects that have been provided as relevant project experience by the prospective project vendor tender winner.

**Confirmation check was completed:** Yes □ No □

**Results of check:** No issues identified □ Issue Identified □ (if so, provide summary below)

**Summary of Issue Identified:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

1. **Adverse Media Checks:** Google search prospective project vendor tender winner, coupled with key words such as “Fraud” and “Corruption” and “Sanctions” (checking specifically news articles).

**Confirmation check was completed:** Yes □ No □

**Results of check:** No issues identified □ Issue Identified □ (if so, provide summary below)

**Summary of Issue Identified:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

1. **UN Sanctions Check :** Click on UN sanctions web site (<https://main.un.org/securitycouncil/en/content/un-sc-consolidated-list>). Select PDF format

 On PDF format, click either option A. Individuals or B. Entities and Other Groups, as appropriate. Type ’Control + F’ and type the prospective project vendors name, to search for matches.

**Confirmation check was completed:** Yes □ No □

**Results of check:** No matches identified□ Matches Identified□ (if so, provide summary below)

**Summary of Matches Identified**: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

1. **US OFAC Sanctions Payment Risk Check:** Click on US OFAC sanctions web site (<https://sanctionssearch.ofac.treas.gov/>). Set “Minimum “Name Score” to “90”. Type the prospective project vendors name in the “Name” field, and add the “Country”, “City”, and “Address” details if known. Click “Search”, to search for matches.

**Confirmation check was completed:** Yes □ No □

**Results of check:** No matches identified □ Matches Identified□ (if so, provide summary below)

**Summary of Matches Identified:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

1. **EU Sanctions Payment Risk Check:** Click on EU sanctions web site (<https://www.sanctionsmap.eu/#/main>). Type the prospective project vendor’s name in the ‘Search’ field. Click ‘Search’, to search for matches.

**Confirmation check was completed:** Yes □ No □

**Results of check:** No matches identified□ Matches Identified□ (if so, provide summary below)

**Summary of Matches Identified:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

1. **UK Sanctions Payment Risk Check:** Click on UK sanctions web site (<https://sanctionssearchapp.ofsi.hmtreasury.gov.uk/>). Type the prospective project vendors name in the ‘Search For’ field. Click 'Fuzzy Search'. ‘Search’, to search for matches.

**Confirmation check was completed:** Yes □ No □

**Results of check:** No matches identified □ Matches Identified□ (if so, provide summary below)

**Summary of Matches Identified:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

## **Appendix V: Preliminary Examination of Bids (sample)**

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| Bidder | Verification | Eligibility | Bid Security | Completeness of Bid | Substantial Responsiveness | Acceptance for Detailed Examination |
| Bidder A | Yes | Yes[[37]](#footnote-37) | Yes | Yes | Yes | Yes |
| Bidder B | No[[38]](#footnote-38) | Yes | Yes | Yes | Yes[[39]](#footnote-39) | No |
| Bidder C | Yes[[40]](#footnote-40) | Yes | Yes | Yes | Yes | Yes |
| Bidder D | Yes | Yes | No[[41]](#footnote-41) | No[[42]](#footnote-42) | Yes | No |
| Bidder E | Yes | No[[43]](#footnote-43) | No[[44]](#footnote-44) | Yes | Yes | No |
| Bidder F | Yes | Yes | Yes | Yes | Yes | Yes |
| Bidder G | Yes | Yes | Yes | Yes | Yes | Yes |
| Bidder H | Yes | Yes | Yes | Yes | Yes[[45]](#footnote-45) | Yes |

## **Appendix VI: Bid Evaluation Summery Checklist**

1. Attach bid opening record, if not previously submitted.
2. Explain any inconsistencies between prices and modifications to prices read out at bid opening (and written into the record) and presented in Table 4.
3. Provide details on eliminating any bids during preliminary examination (Table 5). Copy select pages from bids, as desirable, to show examples of objectionable features.
4. If provisional sums in Table 6 vary among bidders, explain. Explain any substantial corrections for computational errors that may affect the ranking of bidders.
5. Provide a copy of the rates requested for Table 7 and used in Tables 8 or 9.
6. The additions, adjustments, and priced deviations in Table 10 require detailed explanations where they may affect the ranking of bidders.
7. Explain any cross-discount (para. 7(b)) not read out and recorded at bid opening. In addition, attach copies of any evaluation reports for the other related contracts awarded to the same bidder.
8. Provide detailed reasons for refusing to award a contract to a party other than the lowest evaluated bidder (para. 7(c)).
9. If an alternative bid is accepted, provide a detailed explanation of the reasons for its acceptance, addressing issues of timeliness, performance, and cost implications (para. 7(d)).
10. An attachment to Table 11 should explain adjustments to the price provided on line 10. Explain any changes to scope of bid and contract conditions.
11. Provide evidence of alternative insurance.
12. Attach copies of any correspondence from bidders that raise objections or complaint to the bidding and evaluation process, together with detailed responses.
13. Attach copies of any letters to bidders requesting clarifications. Provide copies of responses.
14. Submit bid evaluation with separate evaluation report from consultant, if one was commissioned.
15. Ensure that the bid evaluation report is double-checked, paginated, and complete, and includes a Letter of Transmittal. The Fund will only review reports that are sent to it by the proper authorities.
16. Send by courier or by other swift means such as electronic transmission.

**Any other relevant information**

1. Contract under two-stage bidding will require the information requested for each stage to be filled out [↑](#footnote-ref-1)
2. For single currency option (see Annex I, Paragraph 6(d) (ii), secondary currencies are expressed in column (e) as a percentage of the total bid price. [↑](#footnote-ref-2)
3. Describe any modifications to the read-out bid, such as discounts offered, withdrawals, and alternative bids. Note also the absence of any required bid security or other critical items. Refer also to Annex I, para. 2 herein. [↑](#footnote-ref-3)
4. List here all the conditions provided in the Bidding Documents which bidders must comply for their bids to be considered technically responsive. [↑](#footnote-ref-4)
5. No major technical deviations. [↑](#footnote-ref-5)
6. If the discount is offered as a percent, column *h* is normally the product of the amounts in columns *f* and *g*. Refer to para. 6(c). If the discount is provided as an amount, it is entered directly in column *h*. A price increase is a negative discount. [↑](#footnote-ref-6)
7. In case of abnormally low bid, document any due diligence carried out during evaluation (Refer to para 6 (g). [↑](#footnote-ref-7)
8. Corrections in column d may be positive or negative [↑](#footnote-ref-8)
9. Column d is from Table 7 [↑](#footnote-ref-9)
10. Column f is the sum of bid prices in column e for each bidder [↑](#footnote-ref-10)
11. Column b is from either Table 8, column f or Table 9, column j [↑](#footnote-ref-11)
12. Each insertion in columns *c*, *d*, or *e* should be footnoted and explained in adequate detail, accompanied by calculations. Refer to paras. 6(e), 6(f), and 6(g) respectively of Annex I [↑](#footnote-ref-12)
13. Column *b* refers to Groups A, or B, as indicated by bidder, subject to verification by Beneficiary. [↑](#footnote-ref-13)
14. Column *c* is from Table 10, column *f*. If the lowest total price is from a Group A bidder, it is the lowest evaluated cost bidder, and the remainder of the table need not be filled out. Columns *d* through *g* need to be filled out only for Group B bids. [↑](#footnote-ref-14)
15. Column *d* is the sum of costs in columns *d* and *e* from Table 10 plus other costs incurred within the Beneficiary’s country. Footnotes should be provided to explain the significant components of column *d*. [↑](#footnote-ref-15)
16. Column *g* will be 15 percent. [↑](#footnote-ref-16)
17. Column g for Group A bidders is zero. For Group B bidders, column *g* is the product of columns *e* and *f*. [↑](#footnote-ref-17)
18. Column *b* refers to Group A (preference eligible bidders) or Group B (others) as indicated by bidder, subject to verification by Beneficiary [↑](#footnote-ref-18)
19. Column *c* is from Table 10, column *f*. If the lowest priced bid is from a Group A bidder, it is the lowest evaluated cost bidder, and the remainder of the table need not be filled out. [↑](#footnote-ref-19)
20. Column *d* is the sum of costs in columns *d* and *e* from Table 10. An attachment should be provided to explain the significant components of column *d*. Columns *d* and *e* may be left blank for Group A bidders [↑](#footnote-ref-20)
21. Column *f* for Group A bidders is zero. For Group B bidders, column *f* is 10 percent of column *e*. [↑](#footnote-ref-21)
22. From Table 6, columns *b* and *c*. [↑](#footnote-ref-22)
23. From Table 6, column *d*. [↑](#footnote-ref-23)
24. From Table 6, column *h*. Include any cross-discounts. See Annex I, para. 7(b). [↑](#footnote-ref-24)
25. All adjustments should be explained in detail. [↑](#footnote-ref-25)
26. Sum of the prices in Items 7–10. For single currency bids, express secondary currency amounts as percentages. [↑](#footnote-ref-26)
27. From the Financing Agreement. [↑](#footnote-ref-27)
28. Particular care must be taken in cases where the deadline for submission (or for opening) of bids can be extended, as the duration of bid security is frequently provided in terms of an expiration date. In contrast, bid validity is specified in terms of an interval after the deadline for receipt or the date of bid opening. [↑](#footnote-ref-28)
29. The juridic entities of the prequalified bidders may not be modified in the submission of bids. [↑](#footnote-ref-29)
30. Similarly, a bid offering a choice of different product models is evaluated on the basis of the lowest price offered by the bidder from among the models meeting the requirements of the bidding document [↑](#footnote-ref-30)
31. The ITB on occasion may allow the use of the Merit Point System (MPS) for the purchase of goods. If so, the adjustments will be expressed in points. MPS is generally used for the purchase of IT-related goods and services. [↑](#footnote-ref-31)
32. This restriction may originate with prequalification. [↑](#footnote-ref-32)
33. If the contract is signed without insurance coverage, the Beneficiary must provide the Fund with evidence of alternative insurance payable in a freely usable currency to replace or repair such goods. [↑](#footnote-ref-33)
34. If the disbursement has already been taken place, the Fund may seek reimbursement [↑](#footnote-ref-34)
35. For example, read out and record model numbers of equipment. [↑](#footnote-ref-35)
36. If bid is for a package of contracts, the price for each lot or item should be read out. [↑](#footnote-ref-36)
37. Bidder is partly owned by government (of Beneficiary). It operates under commercial law and is financially and managerially independent of government. [↑](#footnote-ref-37)
38. Joint venture agreement missing. [↑](#footnote-ref-38)
39. Requires 25 percent mobilization advance; bid document states maximum of 15 percent. Deviation is minor and can be accepted. [↑](#footnote-ref-39)
40. Bidder prequalified as local agent; bid is joint obligation with parent company. Bid deemed acceptable because increase in financial backing results. [↑](#footnote-ref-40)
41. Bid security not in freely convertible currency. [↑](#footnote-ref-41)
42. Does not include cost for required disposal of hazardous wastes found at the site. [↑](#footnote-ref-42)
43. Source of plant from non-eligible country. [↑](#footnote-ref-43)
44. Required validity period of security not met (8 weeks instead of 12 weeks). [↑](#footnote-ref-44)
45. Contains several initialed changes substituting ISO standards in the specifications with DIN standards. This is acceptable to the Engineer-in-Charge [↑](#footnote-ref-45)