

ANNEX VIII a

STANDARD FORMATS AND TEMPLATES

STANDARD BID EVALUATION FORMAT

FOR

THE PROCUREMENT OF GOODS

Preface

1. This standard tender evaluation format for the procurement of Goods has been prepared for use by Procuring Entities in the application of the evaluation criteria in the open tendering procedure. The procedures and practices they convey have been developed through international best practice. The document sets out the format of a sample evaluation report. It is mandatory for Procuring Entities to use in order to facilitate the evaluation of suppliers' Bids and the subsequent review of these Bids by the Tender Evaluation Committee.
2. The evaluation forms and guidelines contained in this document provide step-by-step procedures for the evaluation of the Procurement of Goods under the Open Tendering procedure. In all instances, the bidding and evaluation procedures described in the Instructions to Bidders (ITB) of the actual Bidding documents used should be followed, as well as in the Bid Data Sheet, which follows the ITB and provides contract-specific information.
3. Procuring Entities should note that the evaluation and resulting report need not necessarily be lengthy. Procurement of off-the-shelf goods can usually be quickly and easily evaluated. The standard forms should invariably accompany the evaluation report, but they may be adapted to suit specific requirements of the Bidding documents. The evaluation report should include a number of attachments to explain details of the 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.
4. 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 or as sub-packages of one or more lots to several suppliers. In such instances, the Bid evaluation is to be done separately, including any allowances, for each lot, subject to any cross-discounting.

BID EVALUATION REPORT

AND

RECOMMENDATION FOR AWARD OF CONTRACT

Procuring Entity Name: _____

Contract Name: _____

Contract Number: _____

Date of Submission: _____

Table of Contents

1. Identification, Bidding Process, and Bid Submission Identification	5
2. Bid Submission	5
3. Tender Opening.....	Error! Bookmark not defined.
4. Tenders Evaluation Committee.....	7
5. Preliminary Examination of Bids	7
5.1. Completeness of Bid	7
5.2. Bid Validity and Bid Securing Declaration.....	8
5.3. Compliance with Technical Specifications.....	8
6. Substantial Responsiveness.....	9
7. Detailed Examination of Bids	11
7.1. Bids for Detailed Evaluation	11
7.2. Discounts and Corrections	11
7.3. Additional Adjustments, and Price Deviations	11
7.4. Examination of Possible Collusion	12
7.5. Clarifications	12
8. Determination of Award	12
8.1. Qualification Evaluation.....	12
8.2. Recommendation for Award.....	15
9. Bid Evaluation Summary Checklist	15
Appendix.....	17
Appendix 1: Procurement Notice	17
Appendix 2: List of Purchasers of Bid Documents.....	18
Appendix 3: Record of Submission of Bids	19
Appendix 3a: Record of Amendments to Bid Documents.....	20
Appendix 4: Minutes of Bid Opening	21
Appendix 5: Compliance with Technical Specifications	22
Appendix 6: Correspondences on Clarifications.....	23
Appendix 7: Statement on Ethical Conduct and Fraud and Corruption.....	24
Appendix 8. Evaluation Guide	25

1. Identification, Bidding Process, and Bid Submission Identification

The relevant procurement package details are provided in Table 1 below

TABLE 1: IDENTIFICATION

Name of Purchaser	
Name of Contract	
Contract ending Date a) original b) revised	
Contract Number (identification)	
Contract Description	
Cost Estimate	
Method of Procurement	
Date of Approval of the Bidding Documents by the Tenders Committee	

- 1.1. The Bidding Documents** were prepared using the Standard Bidding Documents for Open Tendering for Procurement of Goods as mandated under the Government of Belize, Public Procurement Procedures Handbook. The Tenders Committee provided approval _____ *[insert date]*.
- 1.2.** The Invitation for Bids was advertised in _____ *[insert name of newspaper(s)]* newspaper(s) on _____ *[insert date]*, and the Government of Belize website _____ *[insert date]*.
- 1.3. Appendix 1: Procurement Notice as advertised.**
- 1.4.** _____ *[insert number]* bidders purchased the bidding documents before the deadline for submission of bids. The list of Purchasers is shown in Appendix 2. No amendment to the bidding documents was issued *[if any amendments were issued, state the numbers and dates of issue and attached these as a separate Appendix 3 a]*.

2. Bid Submission

- 2.1.** The deadline for the submission of bids was set at _____ *[insert time and date]*.
- 2.2.** There was no extension of the deadline for bid submission/The deadline for bid submission was extended to..... *[Delete which is not applicable]*. The Bids were submitted on or before the deadline at _____ *[insert time]* on _____ *[insert day]*

and date]. _____ [insert number] bidders submitted the bids before the submission deadline. The Record of Submission of Bids is attached as Appendix 3.

2.3. The data of bid submission and opening are summarized in Table 2 below:

TABLE 2: BID SUBMISSION AND OPENING

1. Bid submission deadline (a) original date, time (b) extensions, if any	
2. Bid opening date, time	
3. Venue of Bid opening	
4. Number of Bids submitted [lots] a) Lot 1 b) Lot 2	
5. Bid validity period (90 days) (a) originally specified (b) extensions, if any	
6. Submission of Minutes of Opening to Tenders Committee and Bidders	

3. Bid Opening

3.1. The Bids were opened in accordance with ITB Clause 19.1 in the presence of the Bidders' representatives and others who chose to attend at _____ [state venue, date and time].

3.2. All Bids were opened, prices read out and details recorded one by one and relevant pages initialed by the Bid Opening Committee, chaired by _____ [give name of chairperson]. There were no clarifications or query sought by any attendee/the clarifications and queries sought by the attendees are provided in the Minutes of the Bid Opening [Delete which is not applicable]. The Minutes of Bid Opening were signed by all members of the Bid Opening Committee. Copies of the Minutes were distributed to the attendees on _____ [date of opening or give date when this was sent to them]. The Minutes are provided in Appendix 4: Minutes of Bid Opening, which include the record of Bid Prices as Read Out and signed by bidders' representatives who attended the bid opening.

Table 3 below provides the bid prices and other relevant details as read out during the Bid Opening.

TABLE 3: SUMMARY OF TENDER PRICES (AS READ OUT)

No	Name of Bidder		Read Out Bid Price (by Lot if more than one Lot)			Bid Securing Declaration	Modifications Discounts Comments
			Lot 1	Lot 2	Lot 3		
	Name						
1						Yes/No	
2						Yes/No	
3						Yes/No	
4						Yes/No	

4. Tender Evaluation Committee

4.1. The submitted bids were evaluated by the Tender Evaluation Committee comprising of:

Give Name and Designation, Chair [insert]

Give Name and Designation, Member [insert]

Give Name and Designation, Member [insert]

4.2. The Tender Evaluation Committee was assisted by Departmental Officers in carrying out the evaluation of bids and their comments have been considered, as appropriate, by the Committee in preparing this report. *[Delete if there were no Departmental Officers called upon for expert advice]*

4.3. All the members of the Committee signed the Statement of Ethical Conduct and Fraud and Corruption which is attached to this report in Appendix 7.

5. Preliminary Examination of Bids

At the first step, a preliminary examination of bids was undertaken to determine whether they:

- (a) were signed (in original) Bid Forms;
- (b) included a Bid Security or Bid Securing Declaration;
- (c) included The Price Schedule;
- (d) included written confirmation of authorisation to commit the Bidder, and;
- (e) included a Manufacturer's Authorisation if required in accordance with ITB 14.2(b).

5.1. Completeness of Bid

(a) Bid Submission Form

[State here whether the bidders signed the form properly. In case of non-compliant bids, give the name(s) and the deviations]

(b) Statement of Ethical Conduct and Fraud and Corruption

[State here whether the bidders signed and submitted the statement. In case of non-compliant bids, give name(s) of bidders and the deviations]

(c) Price Schedule

[State here whether the bidders have submitted and signed the Price Schedule, in accordance with ITB 13.1. In case of non-compliant bids, give name(s) and deviation]

(d) Eligibility

[State here if the bidders meet the eligibility:

- (i) Conflict of Interest*
- (ii) Barred or sanctioned by the Government of Belize, in accordance with ITB Clause 4]*

5.2. Bid Validity and Bid Securing Declaration

- (a) The bid validity period specified in ITB Clause 18 is _____ *[number of calendar days]* after the bid submission deadline date of _____ *[date from Table 2 above]*. The examination revealed that *[chose one of the following]:*

The bid validity of all _____ bidders is compliant with the requirement as specified in the Bidding document.

The bid validity of _____ *[give name]* bidders is not compliant with the requirement as specified in the Bidding document because _____ *[give details of the deviation for requirements]*

- (b) The submission of a **Bid Securing Declaration** using the form included in Section VII, Bidding Forms as specified in ITB Clause 19 was a mandatory requirement. All bidders submitted the Bid Securing Declaration in the form and substance as specified. *[if any bidder has not complied with this requirement, then list the bidders and the deviation from the requirement]*

The summary of compliance is shown below in **Table 4: Preliminary Examination Results**

5.3. Compliance with Technical Specifications

The technical examination of the bids was undertaken to evaluate that the technical aspects comply with the requirements under Section V, Technical Specification and Section VI, Schedule of Requirements of the Bidding document. The evaluation summary is shown in **Appendix 5: Compliance with Technical Specifications**.

[State here if any bids deviations, giving name of bidders and the details of deviations.

Classify them as minor or major and rejecting as non-responsive those bids that have major deviations.

In case of minor deviations, state if any monetary adjustments will be made in the evaluation of the bids.]

6. Substantial Responsiveness

Based on the preliminary evaluation carried out and explained in Para 5 above, the list of non-responsive and substantially responsive Bidders is as follows:

a) Non-Responsive Bidders

1 _____

2 _____

3 _____

b) Substantially Responsive Bidders

1 _____

2 _____

3 _____

TABLE 4: PRELIMINARY EXAMINATION RESULTS

No.	Name of Bidder	Signed in original Bid Form	Price Schedule	Bid Validity and Bid Securing Declaration	Completeness of Bid	Eligibility	Written confirmation of authorisation to commit Bidder	Statement of Ethical Conduct & Fraud & Corruption	Manufacturer's Authorisation	Substantial Responsiveness
	(a)	(b)	(c)	(d)	(e)	(f)	(g)	(h)	(i)	(j)
1	Bidder 1	Yes/No	Yes/No	Yes/No	Yes/No	Yes/No	Yes/No	Yes/No	Yes/No	Yes/No
2	Bidder 2	Yes/No	Yes/No	Yes/No	Yes/No	Yes/No	Yes/No	Yes/No	Yes/No	Yes/No
3	Bidder 3	Yes/No	Yes/No	Yes/No	Yes/No	Yes/No	Yes/No	Yes/No	Yes/No	Yes/No
4	Bidder 4	Yes/No	Yes/No	Yes/No	Yes/No	Yes/No	Yes/No	Yes/No	Yes/No	Yes/No

7. Detailed Examination of Bids

7.1. Bids for Detailed Evaluation

Only the bids that passed the preliminary examination were subjected to detailed evaluation.

7.2. Discounts and Corrections

Those bids were examined for corrections (arithmetic) and corrected in accordance with ITB Clause 27. Each price schedule of these bids was checked for arithmetic errors and omissions.

[State here, for each Bid, the arithmetic corrections as well as corrections for omissions. Give the calculations of the corrections.]

If no corrections were needed for any bid, then state this.

State if any discounts were offered giving the amount and methodology for its application and if these were unconditional and read out in the Bid Opening. Conditional discounts cannot be considered for evaluation.]

The summary of corrections and unconditional discounts, if any are given in Table 5 below:

TABLE 5: CORRECTIONS (ARITHMETIC) AND UNCONDITIONAL DISCOUNTS

No.	Bidder	Read-Out Bid Price	Correction of Computational errors	Corrected Bid Price	Unconditional Discounts		Corrected/ Discounted Bid Price
					Percent	Amount	
		(1)	(2)	(3)=(1)+ (2)	(4)	(5)	(6)= (3)-(5)

7.3. Additional Adjustments, and Price Deviations

[State here, if any, adjustments were made for omission, minor deviations, etc.]

List each adjustment made for the bidder and provide calculations.

(a) Omission

(b) Priced Deviations]

The summary of the adjustments, if any, and ranking of the Bidders are provided in Table 6 below.

TABLE 6: ADDITIONS, ADJUSTMENTS, AND PRICE DEVIATIONS

No.	Bidder	Corrected/ Discounted Bid Price	Addition for Omission	Priced cost of minor deviation	Final Evaluated Bid Price	Ranking
		(6) from Table 5	(7)	(8)	(6) + (7) + (8)	

7.4. Examination of Possible Collusion

[Examine the all submitted bids for similarities that may point to possible collusion among the bidders.

Do a price analysis to determine if there are any indications of collusive behavior.

If there are none, state this.

In case the Report determines there may be some indicators of collusion, these must be pointed out with a recommendation that the Tenders Committee consider the evidence and decide on any action, as necessary.]

7.5. Clarifications

[State the clarifications, if any, that were sought from bidders.]

Copies of the correspondences with bidders and their responses are shown in Appendix 5.

8. Determination of Award

8.1. Qualification Evaluation

The qualifications of the lowest evaluated Bidder who submitted a substantially responsive bid, namely _____ *[name of bidder]*, evaluated in accordance with Post-Qualification Requirements specified in ITB Clause 29, are as follows:

- (a) Experience

[State the experience of the 1st ranked bidder and compare with the requirements.]

- (b) Financial Capacity

[State the financial capacity of the 1st ranked bidder and compare with the

requirements.]

(c) Others

[State compliance with other requirements, like submission of Manufacturers Authorisation, any litigation/ongoing disputes, etc.]

(d) Clarifications

[State any clarifications sought. Copies should be included in Appendix 6.]

The summary of the results of the post-qualification is shown in Table 7 below.

TABLE 7: SUMMARY OF POST QUALIFICATION EVALUATION

Bidder: _____		
Post-Qualification Requirement	Bidder's submit documentary evidence	Compliance
<p>ITB 14.2 (c) (i)</p> <p>That the Bidder has satisfactorily completed at least one contract for supply of similar goods in the preceding three years of not less than __% <i>[insert percentage]</i> of the bid price, which will be the cumulative bid price if bidder bids for more than one.</p>		
<p>ITB 14.2 (b)</p> <p>That the bidder is required to submit the following documentary evidence with the bid in the format provided in Section VII:</p> <p>Manufacturer's Authorisation in the form provided in Section VII of the Bidding document, or a general certificate issued by authorised distributor of the manufactured goods that the bidder is authorised of Dealer/Agent.</p>		
<p>ITB 14.2 (c)(iii)</p> <p>That the Bidder has availability of liquid assets through either:</p> <ul style="list-style-type: none"> - access to a line of credit or cash in bank account of an amount at least __% <i>[insert percentage]</i> of the bid price, net of other contractual commitments; OR - credit terms with vendors specifically for the goods to be supplied under the contract, and valid for at least __ months <i>[insert figure]</i> after the deadline date for submission of bids specified in ITB Clause 21. 		

[Note: If the 1st ranked bidder does not meet the qualifications, then carry out same steps for 2nd ranked bidder, and go on until the qualified bidder is found.]

8.2. Recommendation for Award

The Tender Evaluation Committee (TEC) submits this report to the Tenders Committee for review and consideration of the our recommendation to award the contract to [*name of Bidder*], who has been determined to have submitted the lowest evaluated substantially responsive Bid, for a contract price of _____ [*insert the bid price in figures and in words*].

[In case the TEC has found possible indicators of collusive behavior, this must also be stated here and submitted for review of evidence by the Tenders Committee and for determination of any actions, if required.]

Signature

Chair of TEC Member Member

Name and Designation Name and Designation Name and Designation

Date Date Date

9. Bid Evaluation Summary 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 3.
3. Provide details on eliminating any Bids during preliminary examination (Table 4). Copy select pages from Bids, as desirable, to show examples of objectionable features.
4. If provisional sums in Table 5 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 6.
6. The additions, adjustments, and priced deviations in Table 6 require detailed explanations where they may affect the ranking of Bidders.
7. Explain any cross-discount (para. 7.2) 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. 8.).

9. Attach copies of any correspondence from Bidders that raised objections to the bidding and evaluation process, together with detailed responses.
10. Attach copies of any letters to Bidders requesting clarifications. Provide copies of responses.
11. Submit Bid evaluation with separate evaluation report from consultant, if one was commissioned.
12. Ensure that the Bid evaluation report is double-checked, paginated, and complete, and includes a Letter of Transmittal to the Tenders Committee.

Appendixes

Appendix 1: Procurement Notice

[Insert Advertisement of Invitation for Bid]

[Faint, diagonal watermark text, possibly reading "CONFIDENTIAL" or similar, is visible across the page.]

Appendix 2: List of Purchasers of Bid Documents

Name	Address	Date of Purchase	Receipt No.

Appendix 3: Record of Submission of Bids

Procuring Entity:

Contract Name:

Contract Number:

Opening Date and Time:

Procurement Method:

[Insert Original Document]

No.	Name of Bidder	Delivery Mode	Date	Time	Delivered (Name)	Signature
		<i>[Hand/Courier/Postage]</i>				<i>[Signed By Bidder's Representative]</i>

Appendix 3a: Record of Amendments to Bid Documents

[Insert Documents]

Appendix 4: Minutes of Bid Opening

Minutes of Bid Opening

Contract Name:

Contract Number:

Submission Deadline and Bid Opening:

Venue of Bid Opening:

[Insert original Document]

Seq No.	Name of Bidder	Bid Sealed	Withdrawal/ Modification	Bid Form Completed and Signed	Bid Securing Declaration	Read Out Bid Price in Bid Form	Unconditional Discount	Additional Comment	Bidder	
									Name	Signature

Agenda

1. Opening Remarks by Chairman declaring the closure of Bid submission and Opening of the Bids
2. Clarification/Questions Raised
3. Closing Remarks

Signature: Members of Bid Opening Committee

Chair Member Member Member

Name _____

Appendix 5: Compliance with Technical Specifications

TECHNICAL REQUIREMENT	Bidders' Specification Offered			
	Bidder No. 1	Bidder No. 2	Bidder No 3	Bidder No. 4
<i>[insert technical specifications]</i>				
Delivery Period				
Warranty				
Minor Deviations				
Major Deviations				
Substantially Compliant	Yes/No	Yes/No	Yes/No	Yes/No

Appendix 6: Correspondences on Clarifications

[Insert Documents]

Appendix 7: Statement on Ethical Conduct and Fraud and Corruption

We the undersigned confirm that:

1. During the procurement process and the evaluation of bids and proposals, that we have adhered to the ethical standards set out in the Government of Belize Public Procurement Procedure Handbook for Goods, Works and Services.
2. We have gained in the execution of our duties, no benefit either monetary or in kind from any outside agency, bidder or consultant other than the official remuneration that we have received as public servants
3. To the best of our knowledge that no colleague, associate or relative has received any benefit monetary or in kind from any outside agency, bidder or consultant other than official remuneration.
4. We are unaware of any fraudulent, corrupt, collusive or coercive practices that have taken place during this procurement process and fully understand our moral and ethical obligation to report such should we be aware of it.
5. No conflict of interest exists either on our part or the part of the bidder or consultant recommended for an award of contract, or as far as we are aware the part of our immediate colleagues, associates and relatives.

Name	Position	Signature	Date

Appendix 8: Evaluation Guide

- 1. Identification Bidding Process, and Bid Submission** Tables 1 and 2 provide for the filling of basic information on the procurement process.
- 2. 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. Copies should be sent to all Bidders. Bid opening procedures are described in the ITB.
- 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 may result in denial of its inclusion in Bid evaluation. If a Bid has been withdrawn (in written format), 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 should be rejected at the Bid opening except those received after the deadline for receipt of Bids. Such Bids shall be returned unopened to the Bidders. A summary of the read-out Bid prices should be provided in Table 3.
- 3. Bid Validity** The duration of the validity of each Bid should be the one specified 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.
- 4. 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 successful Bidder is notified of the award of contract. The Tender Evaluation Committee, consisting of a minimum of three qualified members, should work in a secure office where all Bid documents can be kept. There may be a considerable advantage if the same members participated in the preparation of the Bid documents.
- On occasion, the Purchaser may request clarifications of Bidders concerning ambiguities or inconsistencies in the Bid. As required in the ITB, such requests shall be in writing, and no change in the price or scope of the originally offered goods 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 conversations between the Purchaser and Bidders during the Bid evaluation process.
- Bidders frequently attempt to contact the Purchaser during Bid evaluation, directly or indirectly, to query progress of evaluation, to offer unsolicited clarifications, or to provide criticisms of their

competition. Receipt of such information should be acknowledged as to receipt only. The Purchaser 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.

5. 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 non-responsive to the Bidding Documents and therefore are not to be considered further. The following checks should be applied:

- (a) 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 must be submitted; if the Bidder is an agent, an authorisation 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.
- (b) Eligibility: All partners to a joint venture shall be eligible according to the laws of Belize, and the joint venture shall be a registered company. All goods and services shall be eligible according to the laws of Belize. If pre-qualification has taken place, only Bids from pre-qualified Bidders can be considered. 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 contract, or if the Bidder is a publicly owned enterprise from Belize, lacking legal and financial autonomy. (See the ITB for details.)
- (c) Bid Security: The Bidding document may require submission of a Bid security. If so, the Bid security must conform to the requirements of the ITB, and 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 Purchaser's bank instead of the Purchaser 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.
- (d) 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 non-responsive. 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 analysed as per para. 5(e) below. Missing pages in the original copy of the Bid may be cause for rejection of the Bid, as may contradictions in model numbers or other designations of critical supply items.

- (e) 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 Bid Documents. Examples of major deviations include:
- (i) Stipulating price adjustment when fixed price Bids were called for;
 - (ii) 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;
 - (iii) Phasing of contract start-up, delivery or installation not conforming to required critical dates or progress markers;
 - (iv) Subcontracting in a substantially different amount or manner than that permitted;
 - (v) Refusing to bear important responsibilities and liabilities allocated in the Bid Documents, such as performance guarantees and insurance coverage;
 - (vi) Taking exception to critical provisions such as applicable law, taxes and duties, and dispute resolution procedures;
 - (vii) Those deviations that are specified in the ITB as requiring rejection of the Bid.

The results of preliminary examination should be presented in Table 4. If the Bid fails preliminary acceptance, the reasons must be clearly explained in footnotes or in an attachment, as necessary. The Procuring Entity may find it useful to include additional tables for itemisation of responsiveness to a list of technical or commercial specifications. These should be attached to Table 4.

6. Detailed Examination of Bids

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

- (a) Corrections for Errors: The methodology for correction of computational errors is described in the ITB. The read-out Bid prices and their corrections should be noted in Table 5.

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.

- (b) Corrections for Provisional Sums: Bids may contain provisional sums set by the Purchaser 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 5, to allow for a proper comparison of Bids in subsequent steps.
- (c) 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).
- (d) Evaluation Currency: The remaining Bids as corrected for computational errors and as adjusted for discounts, in Belize Dollars, as described in the ITB.
- (e) Additions: Omissions to the Bid should be compensated for by adding the estimated costs for remedying the deficiency. Where items missing in some Bids are present in others, an average of quoted prices could be used to compare competitors' Bids. Alternatively, external sources, such as published price lists, freight tariff schedules, etc., may be appropriate. The cost determined should be expressed in Belize Dollars.
- (f) Adjustments: The ITB specifies which, if any, performance or service factors will be taken into account in the Bid. 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 Bid Documents, unless specifically provided for in the ITB. The value of adjustments will be expressed in terms of cost and should be shown in Table 6.
- (g) Priced Deviations: As discussed under para. 5(e), Bids with minor deviations may be considered substantially responsive.

7. Determination of Award

In the comparison of Bids, the corrected and discounted Bid prices, together with adjustments for omissions, deviations, and specified evaluation factors, have been noted in Table 6. The Bidder with the lowest total is the lowest evaluated cost Bidder at this stage, subject to:

- Application of any discounts, contingent on the simultaneous award of multiple contracts or lots; and
 - Post-qualification evaluation, or, if prequalification has occurred, confirmation of prequalification information.
- (a) 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. Thus, a Bidder offering the lowest evaluated Bid on a particular contract may be denied award because of such a restriction. The Purchaser 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.
- (b) Qualification: If pre-qualification was conducted, the Bidder whose Bid is the lowest evaluated should receive the award, unless the Bidder's qualifications have since materially deteriorated or the Bidder has since received additional work that overstresses its capacity. The Purchaser should satisfy itself fully on both accounts.

Where pre-qualification has not occurred, the prospective awardee should be subjected to post-qualification, the procedures for which are described in the ITB.

If the lowest evaluated Bidder fails 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.

- (c) Alternative Bids: The ITB may request or allow the Procuring Entity to accept alternative Bids under the stipulation that only the alternative submitted by the lowest evaluated Bidder and conforming to the Bid Documents will

be considered. The ITB may allow for submission of an alternative payment schedule. The Procuring Entity, if it is willing to accept the alternative Bid offered by the lowest evaluated Bidder, should provide justification for doing so.

Calculations for the evaluation of alternatives should be provided in an attachment to the report.

- (d) 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 Procuring Entity 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.

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, the Procuring Entity may consider rejection of all Bids.